

## NEW AGENT CHECKLIST

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### STEP 1 – CONTRACTING

- Complete the Contracting Packet sent via DocuSign by your manager. **Text your manager as soon as it's completed**
- Sign contracting emails (see instructions in Step 1 on the website)
- Print the Carrier Contracting Check List, fill it out and **send to your manager** as soon as you sign contracting emails

### STEP 2 – SCHEDULE & TRAINING CALLS

- Review Profitability Calculators and set weekly appointment/income goal
- Print Promotional guidelines
- Join the Theodore Group email list
- Join **ONLY** your Regional Manager GroupME
- Review Regional Manager Team Lead Bonus & Incentives
- Review and add Training Calls to your phone
- Review upcoming training events with your manager

### STEP 3 – DIAL TRAINING & SCRIPTS

- Print IVR Script
- Print overcoming objections
- Watch video on how to increase your show rate
- Print 10 copies of dial tracker
- Register your phone number to not show as spam

**JOIN NEXT TRAINING CALL TO GO OVER STEPS 2 & 3 ON MONDAY @ 12PM EST or WEDNESDAY @ 1PM EST**

### STEP 4 – QUOTERS & PRODUCTS

- Save Quoting tools as shortcuts on your phone's home screen
- Edit Living Benefit Grid with your information – Print in color & laminate
- Print Product Tables in color and laminate front & back

### STEP 5 – LEADS

- Log into Lead Center Account (must have contracting packet approved and completed contracting emails)
- Set up your MailCo Account (you do NOT need to have completed contracting emails)

**JOIN NEXT TRAINING CALL TO GO OVER STEPS 4 & 5 ON TUESDAY @ 12PM EST OR THURSDAY AT 1PM EST**

### STEP 6 – Sales Tools

- Print 10 copies of Needs Analysis Worksheet
- Set up free whereby account and set up email signature
- Download & Print appointment tools

### STEP 7 – Appointment Success

- Watch Needs Analysis Training
- Watch appointment videos
- Text a picture of UPDATED carrier contracting checklist to your manager

### Sales Manager Opportunity

- Text your manager if you are interested in the Sales Manager Opportunity

**JOIN NEXT TRAINING CALL TO GO OVER STEPS 6 & 7 ON WEDNESDAY @ 12 PM EST OR FRIDAY @ 1PM EST**