

NEW AGENT TELESALES CHECKLIST

- ☐ Complete New Agent In-take Form
- ☐ Send a photo of the front and back of your Driver's License
- ☐ Complete Anti-Money Laundering Training
- ☐ Purchase Errors & Omissions Insurance Certificate
- ☐ Have Zoom Onboarding/Contracting Call
- ☐ Register for HCMS and Complete NPN Verification
- ☐ Submit contracting to 4 carriers Via Next Level Contracting (NLC)
 - *4 Carriers: Americo, Mutual of Omaha, Corebridge and American Amicable*
- ☐ Complete New Agent Boot Camp
- ☐ Create Your Agent Back Offices for all 4 carriers (Americo, Mutual of Omaha, Corebridge and American Amicable)
- ☐ Complete Solidity Agency Training:
- ☐ Review Tools of the Trade Videos
- ☐ Review Mindset and Phone Training
- ☐ Review Telesales Sales Process Training
- ☐ Listen to 10 Presentations Live on the Zoom Dial Team
- ☐ Practice Saying Your 1 Call Close Script out loud 20 times
- ☐ Do a Mock Presentation for 3 of your Family/Friends
- ☐ Have a Release Presentation with Your Manager
- ☐ Purchase Leads
- ☐ Dial Live on the Zoom Live Dial Team for 1 Hour on Your First Dial Day

