

New Agent Checklist

Welcome to the Team! Please complete the following steps to ensure a successful onboarding process and strong start in the business.

Step 1: Get Connected

- Register for Slack
- Subscribe to the Solidity YouTube Channel
- Register for Integrity Connect
- Register for Legacy Safeguard

Step 2: Complete Contracting & Carrier Setup

- Submit your contracting to each carrier
- Register with each carrier and create all carrier logins
- Create a Google Sheet to track:
 - Carrier login information
 - Agent writing codes
 - Carrier usernames/passwords
 - Carrier website

Step 3: Print & Review Dialing Materials

- Print the Objections & Rebuttals Guide
- Print the One Call Close Aged Veteran Script
- Purchase the Client Assessment Book

Step 4: Complete Training

- Attend a New Agent Orientation on Zoom
- Complete all required onboarding and sales training
- Listen to **5 full client presentations** live on Zoom
- Practice the Intro to the Script out loud **30 times**
- Complete **3 mock presentations** with your friends/family

Step 5: Practice Applications

- Complete a practice application with **Americo**
- Complete a practice application with **Aetna**

Step 6: Build Your Success Plan

- Write out your weekly schedule
- Write out your personal, financial and business goals
- Determine your lead budget and register for Goat Leads

Step 7: Schedule Your Release Presentation

- Schedule your Release Presentation with your Manager/Up-line

Release Presentation Agenda:

- Review goals
- Review schedule
- Review the One Call Close Telesales Script
- Create a Lead strategy and purchase leads
- Final preparation for dialing live on Zoom

Once your Release Presentation is complete, you will be ready to begin dialing live in the Virtual Office with the Team!