Agent FastStart System Procedures

A quick reference guide to the basic steps and procedures used with agents in the Agent FastStart System.

v 1.30 / Updated May 2016

Agent FastStart System

On-boarding Process & Evolution

Value Proposition

Recruiting Campaigns,
Opportunity Meetings,
eMail Blasts, etc.

Licensed Agents

Unlicensed Agents

Personal Recruiting Link

FS System (Dashboard)

Licensed Agents

Screening Interview

Unlicensed Agents

- Send FastStart Materials eMail & Review w/Agent
- Commit Agent to sending you paperwork within 48 hours
- Schedule FAP Appt 2 days out

Send Licensing Instructions eMail & Review w/Agent

Licensing Exam

Licensing Portal

- Receive Agent Agreement & Contracting Packet - Quick Review
- ***Forward paperwork to Contracting***
- Activate UWU Access (up to 24 hrs.)

FAP Appointment

- Review Fin Action Plan w/Agent
- Assign UWU Campus/Scripts
- Send Website Overview eMail
- Agent ID, Biz Cards, LL Website, etc.
- Assign Training Calls/Webinars
- Schedule Role Play Appt 7 days out
- Select Upline, Level, and Carriers

Role Play Appointment

- Role Play Prospecting/In-Home Pres
- Assign Carrier Product Learning
- Field Train Agent (where possible)
- Have Agent Complete App on Self
- Assign Prospecting Power Pyramid
- Lead Plan for Agent (if applicable)

- Ensure Agent Receives 1st Leads
- Agent Supplies - Apps/Forms
- Knows to "Call from the Table"

- Review Agent Report each week
- Mon/Wed/Fri Calls to Agent
- Ongoing Leads/Prospecting

Success for All Involved

Coach & Mentor

Personal Producer

Time in Field

Leads / Prospecting Plan

Agent Writes Biz

FeV

Additional Sales from FeV

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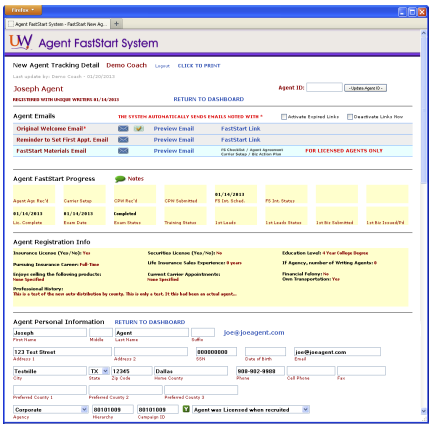
Online Registration System

Step 1 - Agent Signup Process

Agents will complete an online registration process to "sign up" to become agents with us. There are a few things you should be aware of as a coach/manager.

(1) Agents will provide quite a bit of personal and professional information during the registration process. This data is sensitive and must be kept in the strictest of confidence. The agent also answers a number of questions that will provide insight into their background, insurance experience, and the type of products they have sold in the past. They are asked to provide their professional history or upload their resume. All of this information can be viewed on the Agent Detail page of the Agent FastStart System. This is where a number of other functions may be carried out as well, such as sending system pre-formatted eMails which will be detailed later. You may view the Agent Detail page by clicking an agent's first or last name on the Dashboard.



(2) Immediately upon completing the online registration, the agent is taken* to their Agent FastStart System "Next Steps" page where they are greeted by Mike Passaglia (audio) that also walks them through the process and the various steps they will follow to get up and running with us. A Welcome eMail is also sent* to the agent that includes a unique link to their personalized "Next Steps" page, so they may easily return there as needed. The system automatically sends the Welcome eMail*, but it may also be re-sent manually from the Agent Detail page. You may preview any agent's "Next Steps" page by clicking the FastStart Link next to the Welcome eMail on the Agent Detail page.

The agent is asked to complete one specific task on their FastStart System "Next Steps" page.

- Schedule a one-on-one appointment with you, their coach. This is for their Screening Interview (SI).

Note: If an agent registers using your personal recruiting link, they will not be taken to the "Next Steps" page nor will they receive any system eMails automatically.

Note: Agents that you receive on your Dashboard may have already completed a Screening Interview (review Dashboard Notes.) These may be Licensed or Unlicensed Agents. Also, you may have recruited and completed a Screening Inverview with an "unlicensed agent" and then handed them off to an "unlicensed" specialist to walk the agent through the licensing process. Once they pass their state insurance exam and get their license, you will take these "Newly Licensed Agents" through the same process as any other licensed agent.

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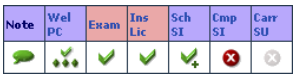
Initial Interviews

Step 2a - Welcome Phone Call

When an agent is added to your Dashboard, you will receive an eMail notification alerting you that you have a new agent. You should immediately check your Dashboard to determine your next step with the agent. Check your Dashboard daily regardless of eMail notifications.

- ☐ If the prospective agent has not scheduled an appointment*, a Welcome Phone Call (Wel PC) should be made to the agent to welcome them and then schedule a Screening Interview (SI). Let the prospective agent know that you are following up on the position they applied for, and schedule an SI with them, or proceed to complete the SI as part of the Wel PC if your schedule, and that of the agent, allows. Answer questions as needed. If the agent does not pick up when you call, leave a VM message with your information. Enter your detailed Notes in the Note column, and set the Welcome Phone Call status as indicated below. ***Note: agents that register with your personal recruiting link will not have received any eMails nor will they have had the opportunity to schedule an appointment.***

  (1) Update the status of the Wel PC column as appropriate.



- ☐ When you make the call and find it necessary to leave a voice mail, or if you are unable to leave a message, set the status accordingly. Once you actually speak to the agent, set a ranking from 1 to 5 "Diamonds" based on your impression of the agent and their potential for success with us. Setting a "5 Diamond" status will also generate a request to Mike Passaglia to call the agent to personally welcome them. The "No Further Contact" status should only be set if you are absolutely, positively sure that we would never want to contact the agent again... for any reason! The ranking may be updated as you move forward through the process with the agent.

  Alive & Breathing Average Above Average Outstanding Walks on Water

Step 2b - Screening Interview (1st Appointment)

- ☐ Complete a Screening Interview (SI) with the prospective agent. Answer their questions. Your goal should be to determine if they have the potential to be successful with us. Take copious notes in the system and get to know the agent and learn their objectives. Cover these major points during the SI.

  (a) Their professional history. Where they are coming from and why they are leaving that organization, opportunity or relationship.

  (b) What are they looking for in a relationship with Legacy Life? Are they looking for a full-time business opportunity, or a part-time income?

  (c) Ascertain their level of commitment both personally and professionally.

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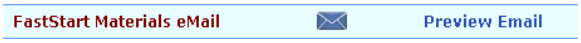
Initial Interviews

Step 2b - Screening Interview (continued)

- ☐ Send the agent the FastStart Materials eMail from the Agent Detail page by clicking the small blue envelope icon. This eMail contains the FastStart Checklist (instructions to the agent for completing the necessary paperwork, registering on the website, etc.), Producer Setup Packet (carrier contracting setup,) Agent Agreement, and a Financial Action Plan (goals/income planner.)



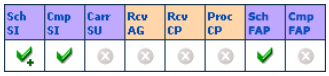
  The SI should end with clear instructions to the agent on their next steps. The agent will typically leave the interview with one key assignment in addition to the other steps detailed in the FastStart Checklist.

  (1) The agent will need to complete their Agent Agreement and Producer Setup Packet and return them to you in 24-48 hours. They should complete the Financial Action Plan and determine why they really want to do this (their "Why") and also their financial goals. They should primarily focus on determining how much they want to earn, so you can help them formulate a plan to achieve their goals during the Financial Action Plan (FAP) appointment.

- ☐ Before you end the SI, be sure to schedule the next appointment with the agent (the FAP appointment.) Schedule that appointment to occur in 2 business days. Let the agent know that they will need to be in front of their computer for your next session.

- ☐ Enter your notes in the Note column.

- ☐ Check off the Cmp SI column indicating the SI has been completed, and the Sch FAP column indicating the FAP is scheduled. Don't forget to enter the appointment in your calendar if you have not already done so.

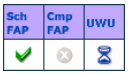


- ☐ Select the appropriate Sales Division in the Sales Div column for the agent.

Step 3 - Receive Contracting Paperwork / Activate UWU

- ☐ When you receive the completed Agent Agreement, Producer Setup Packet, and Business Action Plan from the agent, quickly review for any obvious errors or missing documents, and then forward to the contracting department for processing. Contracting will upload completed copies of these documents to your Dashboard and begin the contracting process once you select Carriers for the agent. Contracting will also return a fully executed copy of the Agent Agreement (AG) to the agent for their files. You may eMail the materials to contracting@uniquewriters.com or fax them to 1-888-812-1565.

- ☐ Initiate the activation of the agent's access to UWU by clicking the UWU column and setting "Activate UWU Access" in the popup. Once contracting verifies and executes the AG, the agent will have access to UWU (typically 24-48 business hours later.)



  ✳ **Be sure to eMail or Fax all completed contracting paperwork to the contracting department**

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2nd Appointment

Step 4 - Financial Action Plan (FAP) Appointment

(1) Conduct the FAP using the "Financial Action Plan" goal sheet the agent has filled out.

- ☐ Begin this appointment by reviewing the previous assignments given to the agent and ensure that all requirements have been completed and turned in.

- ☐ Work through the Financial Action Plan goal sheet with the agent. Help them determine exactly what they need to do to achieve the income they desire, and formulate an action plan (how many appointments they need to set each week) to realize their goal. You must help them hold themselves accountable to the income goals they have set for the agent to achieve lasting success with you.

(2) UWU Orientation and Assignments (Screen Share).

- ☐ Make an assignment to the agent to get into UWU and begin their studies there as soon as they are activated. Guide them through the website and UWU, giving them specific instructions to start at the top, Section 1, and then work their way down through the various sections, printing out the PDFs, and following along with the video and audio training segments.

- ☐ Send the agent the Website Overview eMail and instruct them to use the link in the eMail to watch a recording of a training overview of the Website and UWU, to help prepare them to begin their studies in UWU. Let them know that if not already activated, they should expect to receive access to UWU in the next 24 hours (provided they have returned their completed Agent Agreement and Producer Setup Packet.)

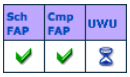
- ☐ If you are utilizing Legacy Life branding and materials, show the agent (via the screen share) where in UWU they can go to order their ID Badge, Business Cards, Legacy Life Agent Website & eMail Address.

- ☐ If applicable, show the agent the Campus Calendar and point out the webinars and calls they should begin attending. Make sure the agent has the dial-in information for the National Sales Training Call.

  - Remind the agent to create a profile on the website (for UWU access) if not already completed.

- ☐ Schedule your next appointment (Role Play Appointment) with the agent for 7 days out. This gives them time to complete the next set of tasks you have assigned them. Don't forget to enter the appointment in your calendar.

- ☐ Check off that the FAP is complete in the Cmp FAP column



- ☐ Select Default Upline, Contract Level, and choose the Carriers to be contracted for agent (see next page)

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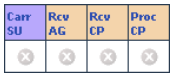
Agent Contracting Setup

Step 4a - New Agent Carrier Contracting Setup

- ☐ Complete the Carrier Contracting Setup

  - Click the Carr SU column to open the popup window.



  - Select the agent's Default Upline. This is yourself if a personal recruit, or another recruiting agent in your downline.

  - Select the Default Core UW Level for the agent. Refer to your Carrier Contract Levels grid.

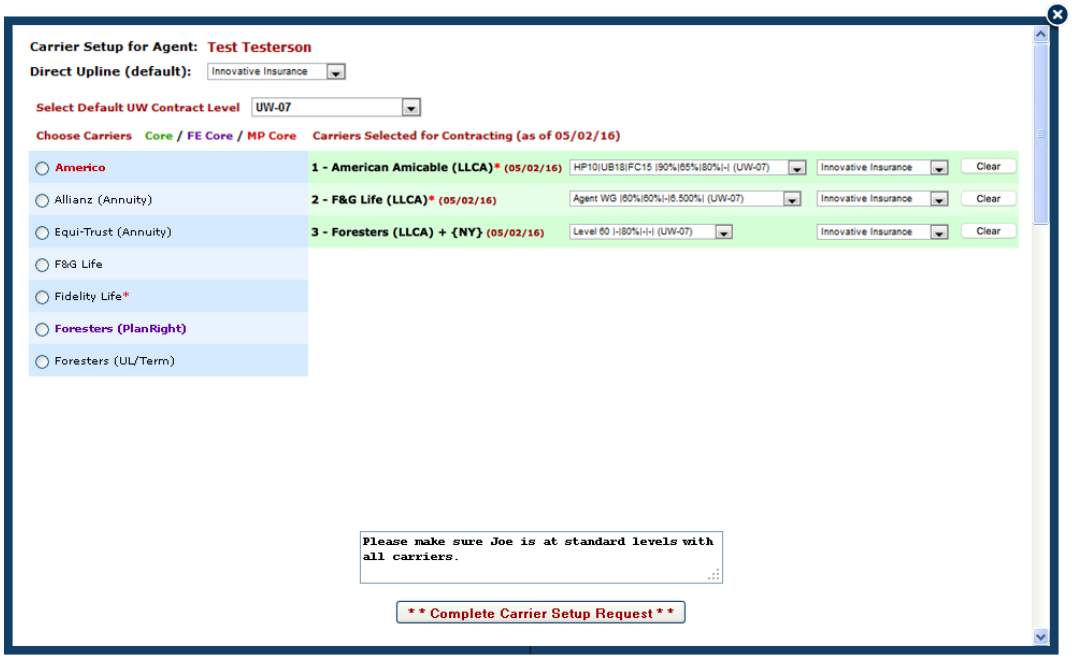
    Click the carriers in the left (blue) column that the agent is to be contracted with. These will move over to the right (green) column as you add them. Agents should only be contracted with a few core carriers to get started. Others may be added as the agent gains proficiency with their core carriers.

    To remove a selected carrier from the list, click the Clear button next to the carrier name.

    Confirm the Upline and Contract Level for each Carrier selected. Make any changes using the drop-down boxes as needed.

    After choosing the agent's initial group of carriers, scroll to the bottom of the window and enter any special instructions or other information in the contracting notes.

    Click the "Complete Carrier Setup Request" button to submit the request to the contracting dept.



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Agent Contracting Setup

Step 4a - New Agent Carrier Contracting Setup (continued)

The contracting department will check off the Rcv AG column confirming that the agent's Agent Agreement (AG) has been received and executed.

The Rcv CP column will be checked off by the contracting department when all necessary Contracting Paperwork (CPW) has been received from you for the new agent. Everything needed is detailed in the Producer Setup Packet.

If you see a ⚠ in the Rcv CP column, this warning symbol indicates missing or incomplete CPW. The Dashboard Note column will contain details on missing requirements. The contracting department will contact the agent for missing requirements and copy you on the correspondence. As you talk with the agent, encourage them to take care of the missing requirements right away. You have the relationship with the agent and are in the best position to help ensure that they complete the contracting requirements in a timely manner.

Once the CPW is complete , the contracting department will check off the Rcv CP column.

As the contracting process progresses, you may view the individual contracting status for an agent's carriers by clicking the Proc CP column. You will also receive eMail notices as agent contracting is submitted to the carriers and as carrier contracting approvals and agent numbers are received by the contracting dept.

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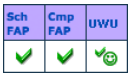
3rd Appointment

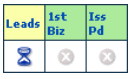
Step 5 - Role Play Appointment

This third appointment is where all the study and practice by the agent come together. The agent should be able to deliver the phone script, and handle basic objections. Then the agent should be able to give you the in-home presentation script, and deliver it from memory as scripted.

- ☐ Role play with the agent... increasing the difficulty of the objections as they gain confidence in what they are delivering to you. They must be flawless in the phone script before they ever begin to call live leads.
- ☐ Once the agent has demonstrated satisfactory mastery of the scripts and concepts, and you have completed sufficient role play with the agent to the point where you feel they fare ready to receive leads and start calling new prospects, you can set "Ready For Leads" in the UWU column.



- ☐ Assign the agent specific carriers and products to study and learn in UWU or on the carrier(s) website(s).
- ☐ Field Train the agent (where possible.) Going on a few appointments with you or another experienced producer will bolster the agent's confidence and help them put theory in practice.
- ☐ Have the agent complete an application on himself/herself for each carrier they will be writing so they are already familiar with the forms and know where to add in the Financial eValuator.
- ☐ Have them print out the Prospecting Power Pyramid from UWU, and help them to understand and commit to a goal of setting 15 appointments each week. This will virtually guarantee success!
- ☐ If applicable, arrange for the agent's first lead order and any ongoing lead program. Set "Leads in Process" in the Leads column



  - The lead department will check off the Leads column once the agent's first leads are actually sent to them. You may also check off this item if you know it's completed.

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Final Preparation

Step 6 - Prepare Agent for First Appointments

The time an agent spends in training before being ready to get leads and run business, will vary from a few days to a couple of weeks depending on their skill level when they are first recruited. You will need to encourage them regularly, and be there to answer questions, overcome fears and role play with them both on setting appointments and their in-home presentation. Whenever possible, a new agent should accompany you (or another experienced producer) into the field on a few appointments as part of their training. This will help them put into action what they have studied. It is essential that you (or a trainer) deliver the presentation in the home as scripted... as they have learned and practiced and role played with you.

- ☐ Confirm with the agent that they have received their first order of Leads (if applicable), and determine the times they will be prospecting so you can follow up and review their results with them.
- ☐ Make sure Agent has printed all necessary applications and forms. Confirm that any Carrier Software (if used) is loaded and working. Ensure they have all needed supplies (black pens, biz cards, ID badge, etc.)
- ☐ Instruct Agent on the procedure to reach you from the table in a client's home when they are running appointments. Teach them how to make that call so that it instills confidence in them and their clients. Your agents should never leave a home because they did not have the answers they needed to write a client. Let them know that you will be there for them.

Once the agent has mastered the basics and has completed their initial training, they will need to visit UWU on a regular basis to brush up on skills they have learned, and also to begin learning new products, concepts and skills that will greatly enhance their business. Encourage them to take advantage of the wealth of training opportunities made available to them, and to always be learning something new to enhance their business. Have them download the MP3 files of the various training topics and listen to them as they drive to appointments. They will be amazed at how quickly they will absorb and master these concepts.

Your investment in time and training with an agent will pay off with huge dividends down the road. Each time an agent interacts with you, they learn a bit more and leave your sessions more confident, knowledgeable, and capable of succeeding on their own. This will translate to long-term success for the agent...
and for you.

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End Game

Step 7 - Monitor Agent Progress / Manage Success

Once an agent completes his first appointments, it is crucial that you "debrief" with him/her and talk about what went right, and what needs to be better. This is an ongoing process that will take many weeks or months to fully complete. After that, regular calls, mentoring and support will help ensure your agent's long term success.

- ☐ Review Agent Production Reports each week.
- ☐ Complete your Monday/Wednesday/Friday Calls to all Agents.
- ☐ Ensure lead orders are in place (if applicable) and agent is receiving leads as ordered.

Step 7 - Wrapping Up the FastStart Process

- ☐ You may check off the 1st Biz column once the agent's first written business has been reviewed by you and submitted to the Carrier for processing.

- ☐ The Agent Support Center new business specialist will check off the Iss Pd column when the agent has their first Issued/Paid business. You may check this off as well if you know it has been completed.

The FastStart Process effectively ends when the agent has their first issued/paid business. The entire row for the agent should then display green check marks all the way across.

The agent can then be moved to the FastStart Complete section by clicking on the ✅ to the far right of the Dashboard.

The system is designed to allow you to manage agents in three separate sections -- the Active Records (normal) section, the FastStart Complete section, and the Hidden section (for agents you no longer plan to work with and want to move off your normal/active screen so you can better focus on those you are currently working with.) Agents can always be returned to the Active Records screen with the click of a button.

To hide an agent, click the ❌ to the far right of the Dashboard.

To unhide an agent (returning them to the Active Records screen,) click the 🔼 to the far right of the Dashboard when in the Hidden or FastStart Complete sections.

Note that if an agent discontinues their association with us, they should be moved to the Hidden section immediately. This will automatically flag them in the system to be removed from eMail lists and also remove their access to UWU resources. Returning an agent from the Hidden to the Active Records or FastStart Complete sections will automatically flag them in the system to have their access restored.

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