Legacy Life Career Agent
On-boarding Process & Evolution

ONE LIFE

- **Establish your Value Proposition in Recruiting Campaigns, Opportunity Meetings, eMails, etc.**

1. ***Use your Personal Recruiting Link to have candidates register directly to your Dashboard***
2. ***Hold a Screening Interview with the candidate***
   a. ***Unlicensed Candidates***
   Send Unlicensed Candidates the Licensing Instructions eMail and review with them. Their first step is to get an insurance license before you do anything else with them.
   b. ***Licensed Candidates***
   For Licensed Candidates, send them the FastStart Materials eMail and review the FastStart Checklist in that eMail with them. Commit Agent to completing and returning the paperwork within 48 hours so you can continue with their FastStart process. Schedule your next appointment (the FAP Appointment) for 2 days out.
3. ***Receive the completed Agent Agreement, Producer Setup Packet, and the Financial Action Plan***
   a. Give paperwork a quick once over to check for obvious errors or missing items.
   b. Forward all paperwork to **contracting@uniquewriters.com** or fax to **1-888-812-1565**
   c. Activate Agent's UWU access from your Dashboard. It may take up to 24 businss hours for their access to be activated. Agents will receive an email from the system when that has happened.
4. ***Hold your next appointment with the Agent (FAP Appointment)***
   a. Review their Financial Action Plan and make sure they have established realistic goals. Help them identify their true "why" and their "one thing." Calculate and show them how many appointments they will need to set each week to reach their financial goals. This is crucial!
   b. Assign them to go into UWU and view the MP Campus as soon as they are activated. Have them specifically learn the Prospecting and In-Home Presentation Scripts for your next meeting.
   c. Send them the Website Overview eMail and instruct them to watch the video to prepare for UWU.
   d. Direct them to the website and have them order their Agent ID Badge, Business Cards, and Legacy Life Agent Website & eMail Address.
   e. Assign them any training webinars/calls to attend. Give them the weekly National Call dial-in info.
   f. Schedule your next appointment for 7 days out, and remind them you will be role playing the Prospecting and the In-Home Presentation scripts at that next appointment.
   g. Select Upline, Default Contract Level, and Carriers for Agent so that contracting work can begin.
5. ***Hold your next appointment with the Agent (Role Play Appointment)***
   a. Role Play with them using the Prospecting and In-Home Presentation Scripts.
   b. Assign them specific Carrier(s) and Products to study and learn in UWU or on carrier website(s).
   c. Field Train Agent (where possible.) Going on a few appointments will bolster Agent's confidence.
   d. Have the Agent complete an application on himself/herself for each carrier they will be writing.
   e. 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!
   f. Order the Agent's First A- / B / PA Leads. Tell them they will receive leads the following Friday.
6. ***Prepare Agent for First Appointments***
   a. Ensure Agent receives 1st order of Leads. Review w/Agent and answer any questions.
   b. Make sure Agent has printed all necessary applications and forms. Confirm that any Carrier Software (if used) is loaded and working. Other supplies (black pens, biz cards, ID badge, etc.)
   c. Instruct Agent on the procedure to "Call from the Table" so you can help them close their first sales.
7. ***Monitor Agent Progress / Manage Success***
   a. Review Agent Production Reports each Monday.
   b. Complete your Monday/Wednesday/Friday Calls to all Agents.
   c. Place weekly Lead Orders on Wednesday for Friday Lead Distribution.

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