



Legacy

GROUP

AGENT NAME



Protect 1 Family, Inc.



PRE-SALES ACADEMY

- ❑ Send them the audio recording of “Phases of Your Career” by Rob Alkema to prep for the Pre-Sales Academy PC
- ❑ Schedule and Complete Pre-Sales Academy PC (follow outline on next page)
- ❑ Schedule your Weekly Business Review in both of your calendars for week 2 (to review week 1 progress)

“One of the key aspects of your role as a leader is to help the people you work with develop and stick to a schedule that is going to help them meet and exceed their goals.” – Peter Ferre

PRE-SALES ACADEMY PERSONAL CONFERENCE

In the week leading up to one of your recruits coming to sales academy you should have a meeting with them to set proper expectations for the week of training and to help them enter the first phase of their career with the correct perspective on what is expected of them and what it will take to build a success business.

You can also listen to an audio recording on the Legacy website of Aaron Schafer role playing this personal conference.

1. Everything ready for Sales Academy?

- a. Go through “Preparing for Sales Academy” and make sure they have done everything they need to do. Is all their paperwork done? Have they applied for their insurance license?
- b. Answer any questions they have.
- c. Sales Talk - If they have not already memorized their sales presentation, help them come up with a game plan over the next several days to get this done. You need to be part of this plan on a daily basis inspecting what you expect. Holding them accountable to their goals through holding them accountable to their action steps will be a big part of their success here and you can set the right tone from the beginning by making sure they have done everything they said they would leading up to Sales Academy. If you do not hold them accountable, the opposite will happen and they will learn that they do not need to do what they say because no one is checking in.
- d. Schedule for 1st Week in the Field – complete a blank WGP with them, and explain the process of “Vision – Plan – Follow Through.” They will be successful if they set a goal that gets them closer to their destination, they make a plan to reach that goal, and then they work their plan. A good schedule consists of 3 things:
 - i. Their “life stuff” – Bible study/devotions, exercise, family time, errands, etc. and planning that in first
 - ii. Their personal improvement time – this is more important than their field time, since this is where they sharpen their saw before they go to cut down trees for the day. This includes B2B CT audios, conference calls, studying their sales presentation, stat calls on days they aren’t with a trainer, etc.
 - iii. Their field time – they can simply block off when they start/stop work. Review their plan, and be sure their plan matches what it will take to hit their goals.

2. Discuss Rob Alkema’s audio

- a. Take away - What did you take away from the audio?
- b. Habits - Emphasize the point that the first 6 months the only thing that matter is the habits they form in terms of their work habits and attitude. If they do a great job with these, success is only a matter of time in this career.
- c. Challenging - What will be the most challenging part of the first phase for you personally? Discuss.
- d. How do you like to be coached? How can I help you most effectively while you are getting up the learning curve in the first phase of building your business?

3. The challenge of Sales - This will be for folks that never sold books and are doing outside sales for the first time. Many people incorrectly think that they have “been in sales forever” if they have worked in retail or inside sales. Helping them realize the challenges that exist when you are going to others instead of them coming to you will be critical in helping them emotionally handle the first 3 months in their career. If someone either sold books or has done some other extensive outside sales in the past, we will cover this through a slightly different angle.

- a. Sales people are the happiest – Whenever you meet people who have done sales for 5+ years they are some of the happiest people you meet and will pitch you on sales being the best job ever. So why do you think it is that people in their first year of sales use language like, “sales is a grind” or “sales is a tough gig”?
- b. Placing meaning on the no – The biggest difference is that experienced sales people have learned not to place extra meaning on the word no. They realize that sales is purely a numbers game and if they talk to enough prospects, great things will happen. They enjoy spending the day meeting new people, hearing their stories, becoming part of the community, and connecting. First year sales reps have a tendency to make the no mean more. The most common misplaced meanings are:

- i. Making it about themselves – You can always grow and improve, but being overly hard on yourself is counter-productive. Learn to constantly strive to get better, but enjoy the process.
 - ii. Believing objections – If you hear any particular objection enough it is easy to start to believe it and expect it. Don't fall into this trap. Learn to answer objections confidently every time and good things will happen.
 - iii. Blaming “the system” – We want you to do well. We are going to train you in a system that has been proven to work over and over again. We are going to put you in a territory where you can be successful. It doesn't help either of us if we were to do otherwise. However, while you are on your learning curve it can easily feel like “this doesn't work” or maybe “this doesn't work in my turf”. If you are learning to shoot a basketball and really trying to do it the way it is taught by a shooting coach, it still takes a while to actually start making a high percentage of your shots. Starting out in sales is no different. Focus on improving within the system as opposed to changing the system and down the line you will be incredibly grateful for it!
- c. Be honest with us the entire time with what you are going through and we will help you every step of the way!

4. This will present a new and unique challenge - This is what to cover instead of the above portion for SW alum or people with extensive outside sales experience in the past.

- a. Guard your habits – The biggest mistake people make when coming to us with previous experience is thinking that they are just going to hit the ground running and are not as diligent with guarding their habits. What habits have you found most important for you in the past when you were selling at a high level? If they do not reference unconditional commitment to their schedule, working by the goal period, and self talk; you should emphasize these. The reality is that it is impossible to fail in sales if you always work when you say you will, stay present by working one goal period at a time, and have amazing self talk.
- b. Come in humble and hungry – You should approach this as if you are a rookie in sales and want to soak up every single bit of knowledge possible. Listen to audios daily, review your sales talk, read claims, learn how to answer objections with confidence, follow people who are jamming, and determine that you will outwork the competition these first 6 months.
- c. Specifically for book kids – Remember that this is now a career and not a 12 week blitz. The great part about this is that you can have an awesome life outside of your job. There is balance, time off, and flexibility. The challenge is that while you are having a tough week there is no saying, “I only have 5 more weeks of this!” The biggest thing that separates the top people in this job that come from Southwestern is that they approach this job as an adult. Adults do not go to a job, have a tough week, and then question “Am I really passionate about this? Is this really for me? Did I make a mistake?” SW alumni who do this within their first job, not just Family Heritage, end up bouncing around between 4-5 jobs after they leave books. The problem is they are still acting like a college kid. They don't commit to any one thing. If you treat this like a career you are going to build an unbelievable life for yourself. That starts by going to battle when you are having a down week. That is what it means to be emotionally mature and to be an adult.
- d. Why did you choose Family Heritage in the first place?
 - i. End on a note of building confidence
 - ii. “I am excited to help you build something amazing here! Can I count on you going to battle when there are bumps in the road? Awesome. I am excited to being your battle partner!”

5. What is required? vs What does it take?

- a. Single biggest differentiator between successful entrepreneurs, which is what we are in this business, and average entrepreneurs is mindset. Average people ask “What is required? Do I have to work nights ever? Am I required to work a Saturday? Do I have to...” Successful people ask, “What does it take?”
- b. Your first 6 months, you have to have a “What does it take?” mindset. If you make the decision to commit to doing whatever it takes to protect at least 2-3 families a week, you will have an amazing career here.
- c. Think you can do that? What are the biggest ways you can see making that happen personally?
- d. Well if you will do this, you are going to be awesome at this!

SALES ACADEMY WEEK

- Daily check-in call at the end of Sales Academy each day
 - What did they like about the day?
 - What did they learn?

- Share good news from your group mid-way through the week in an e-mail, a voxer message, or a phone call

"What you get by achieving your goals is not as important as what you become by achieving your goals." – Peter Ferre

WEEK 1

- ❑ Work with the new agent 4 full days (8+ hours) in the field, with a minimum of 2 days in their territory

Recommended Schedule:

- Monday: new agent follows all day
 - Tuesday: new agent follows 75% or more of the approaches for the day
 - Wednesday: trainer shadows new agent in the new agent's territory
 - Thursday: the new agent works alone
 - Friday: trainer shadows the new agent in their territory (new agent does 75% or more of the approaches)
- ❑ Give the new agent the first application sold as soon as you sell it.
It is crucial that they have the confidence of knowing they will make a paycheck their 1st week. They also need to see an abundance mentality – you know there are plenty of sales coming and are generous to help them get started.
 - ❑ Daily check-in phone call or voicemail message where the new agent recaps their takeaways from their morning study time (B2B CT audios, Sales Talk, Conference Call, or other Legacy Audio training)
 - ❑ Complete a Weekly Business Review after week 1 is over Recommendation: set the WBR meeting for Monday morning. Budget ~1 hour for the meeting.
 - ❑ On Thursday or Friday, send off new business and show them how to complete a New Business Transmittal

"The more connected we are with the numbers of our business, the more influence we can have on the success of our business." – Peter Ferre

NEW AGENT WEEKLY REVIEW

Week 1

- Completed and turned in a WGP by Sunday night
- Used a goal card every day/worked each day by goal periods
- Hit daily start & stop times (from WGP) every day
- Read something positive daily – what I read (book title):
- Listened to motivational or sales training audios daily
- Worked 9-10 hours Mon-Fri
- Did 25-30+ demos this week
- Called my trainer daily with questions or to share good news
- Protected 3+ families this week or did my best to get families protected (50+ hrs/25+ demos)
- Positive self-talk daily throughout the day
- Plugged into at least 3 conference calls
- Reported my stats every night when I finished for the day

GRADE FOR THE WEEK:

- A+ = 12
- A = 11
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- C = 7-8
- D = 5-6
- F = 4 or less

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What were 5 good things about this past week?

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- Where did I make progress this week?
- What was the most valuable lesson I learned this past week?
- What one area can I work on that will have the biggest positive impact this week?
- This is a great career because....

*Figure profit for the week – if appropriate ($GAP \times \text{commission \%} \times 0.82 \text{ annual retention} = \text{net profit}$)

*Look at where they are in relation to the first 100 demo's and goal set when to accomplish that by

*Log into the FHL website and talk with them about what to review each and every week

*Set specific goals for next week

* Log into Legacy website and show them how to enter stats and navigate the Tools section

WEEK 2

- ❑ Work with the new agent 2 full (8+ hours) days in the field:
 - ❑ 1 full day in their territory
 - ❑ 1 full day in your territory

- ❑ Do stat calls at the end of the work day on the days when you're not working with the new agent
 - What were their stats and how did their stats compare to the goals they set for the day?
 - How was their day?
 - What was the part of their day that they feel the best about?
 - What is the one area that they can work on tomorrow that they feel would make the biggest impact?

- ❑ Complete Weekly Business Review outside of income-producing hours (very beginning or very end of the day) Recommendation: turn in a copy of the completed New Agent Weekly Review document to the Sales Director

- ❑ Daily check-in phone call or voicemail message where the new agent recaps their takeaways from their morning study time (B2B CT audios, Sales Talk, Conference Call, or other Legacy Audio training)

"Outstanding leaders go out of their way to boost the self-esteem of their team. If people believe in themselves, it's amazing what they can accomplish." – Peter Ferre

NEW AGENT WEEKLY REVIEW

Week 2

- Completed and turned in a WGP by Sunday night
- Used a goal card every day/worked each day by goal periods
- Hit daily start & stop times (from WGP) every day
- Read something positive daily – what I read (book title):
- Listened to motivational or sales training audios daily
- Worked 9-10 hours Mon-Fri
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*Look at where they are in relation to the first 100 demo's and goal set when to accomplish that by

*Log into the FHL website and talk with them about what to review each and every week

*Set specific goals for next week

* Log into Legacy website and show them how to enter stats and navigate the Tools section

WEEK 3

- ❑ Work with the new agent 2 full (8+ hours) days in the field:

Recommendation: have them shadow you if necessary (i.e. they are struggling with their sales talk or attitude)

- ❑ Do stat calls at the end of the work day on Monday, Wednesday, and Friday
 - What were their stats and how did their stats compare to the goals they set for the day?
 - How was their day?
 - What was the part of their day that they feel the best about?
 - What is the one area that they can work on tomorrow that they feel would make the biggest impact?

- ❑ Complete Weekly Business Review outside of income-producing hours (very beginning or very end of the day) Recommendation: turn in a copy of the completed New Agent Weekly Review document to the Sales Director

- ❑ Daily check-in phone call or voicemail message where the new agent recaps their takeaways from their morning study time (B2B CT audios, Sales Talk, Conference Call, or other Legacy Audio training)

- ❑ Give them a copy of their homework assignment to fill out in preparation for their 30-day Business Review next week (see blank copy below). This can be given to them as a printed hard copy or e-mailed to them as a soft copy.

"People tend to stay motivated when they see the value to them of the things they are asked to do." – Peter Ferre

30 Day Business Review Preparation

If you haven't already, choose a name for your business and write it here:

Name of Your Business: _____

Qualitative

- Overall how would you say that you are doing personally and professionally? Why?
- On a scale of 1-10 how is your effort? Why?
- On a scale of 1-10 how is your attitude? Why?
- On a scale of 1-10 how committed have you been? Why?
- What are you most proud of?
- In what area do you feel that you need the most improvement?
- How can we best support you?

"People tend to stay motivated when they see the value to them of the things they are asked to do." – Peter Ferre

NEW AGENT WEEKLY REVIEW

Week 3

- Completed and turned in a WGP by Sunday night
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- What one area can I work on that will have the biggest positive impact this week?
- This is a great career because....

WEEK 4

- ❑ Complete a 30-day PC with them (follow and complete the outline on the next page).

- ❑ Implement the 2-day blank rule: if they go 2 full days without a sale, they follow on the 3rd day
Recommendation: if possible, follow them for at least a half day; have them follow for at least a half day

- ❑ Do stat calls at the end of the work day on Monday, Wednesday, and Friday
 - What were their stats and how did their stats compare to the goals they set for the day?
 - How was their day?
 - What was the part of their day that they feel the best about?
 - What is the one area that they can work on tomorrow that they feel would make the biggest impact?

- ❑ Complete Weekly Business Review outside of income-producing hours (very beginning or very end of the day) Recommendation: turn in a copy of the completed New Agent Weekly Review document to the Sales Director

- ❑ Daily check-in phone call or voicemail message where the new agent recaps their takeaways from their morning study time (B2B CT audios, Sales Talk, Conference Call, or other Legacy Audio training)

"People create their own success by learning what they need to learn and then by practicing it until they become proficient at it." – Peter Ferre

30 Day Business Review

Review their business name with them

- Discuss the importance of naming your business in having an ownership mindset.
- Ask why the name they chose is meaningful and important to them.

Qualitative (this is the portion they should have completed prior to your meeting):

- Overall how would you say that you are doing personally and professionally? Why?
- On a scale of 1-10 how is your effort? Why?
- On a scale of 1-10 how is your attitude? Why?
- On a scale of 1-10 how committed have you been? Why?
- What are you most proud of?
- In what area do you feel that you need the most improvement?
- How can we best support you?

Review expectations

The keys to being successful:

1. 2 out of 3
2. wgp
3. system/sales talk

Look at their canvassing chart (printed copy before the meeting) -- “Stats Reports” on the Legacy website

1. Work Stats

Review Hours

Review Calls

Review Demos (Progress of first 100 demos *This is where breakthroughs happen)

How many 2 out of 3 days in last 4 weeks?

2. Review WGP

How many done?

How has it been going?

How have you been using it?

3. Sales Talk--watch them do a demo and review
 (Remind them of the tools available)
 Continual Training audios/Legacy website "Tools" section
 Success Manual
 Conference Calls
 Other Agents (phone, follow, etc)
 FHL website--Eagles, IRAs
 Positive books, self talk

Observations and Discuss strategies to achieve goals

Review the financial opportunity (Have canvassing chart from legacy website handy)

Their average cash flow per sale (package size x commission x .6)

1st year commission per sale (NAP x commission % x 0.82)

Total commission per sale (NAP x 1st Yr % x 0.82 + Renew % x .06)

Show what working consistently & greening out 48wks/yr looks like for them

$48 \times 5,000 = 240,000 \text{ GAP} \times .82 \text{ (avg. retention)} = 196,800 \text{ NAP}$

$196,800 \text{ NAP} \times \text{commission \%} = \text{1st yr earnings}$

$196,800 \text{ NAP} \times \text{renewal \%} \times 0.06 = \text{future lifetime renewal earning}$

What is the next benchmark (Action Step) that you want to achieve?

- Why is that important (i.e. how does that benchmark tie in to their long-term goals/vision)?
- When will you achieve that by?
- How can we best support you?

NEW AGENT WEEKLY REVIEW

Week 4

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- Hit daily start & stop times (from WGP) every day
- Read something positive daily – what I read (book title):
- Listened to motivational or sales training audios daily
- Worked 9-10 hours Mon-Fri
- Did 25-30+ demos this week
- Called my trainer daily with questions or to share good news
- Protected 3+ families this week or did my best to get families protected (50+ hrs/25+ demos)
- Positive self-talk daily throughout the day
- Plugged into at least 3 conference calls
- Reported my stats every night when I finished for the day

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What were 5 good things about this past week?

1.

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- Where did I make progress this week?
- What was the most valuable lesson I learned this past week?
- What one area can I work on that will have the biggest positive impact this week?
- This is a great career because....

NEW AGENT WEEKLY REVIEW

Week 5

- Completed and turned in a WGP by Sunday night
- Used a goal card every day/worked each day by goal periods
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- Where did I make progress this week?
- What was the most valuable lesson I learned this past week?
- What one area can I work on that will have the biggest positive impact this week?
- This is a great career because....

NEW AGENT WEEKLY REVIEW

Week 6

- Completed and turned in a WGP by Sunday night
- Used a goal card every day/worked each day by goal periods
- Hit daily start & stop times (from WGP) every day
- Read something positive daily – what I read (book title):
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- Worked 9-10 hours Mon-Fri
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- This is a great career because....

NEW AGENT WEEKLY REVIEW

Week 7

- Completed and turned in a WGP by Sunday night
- Used a goal card every day/worked each day by goal periods
- Hit daily start & stop times (from WGP) every day
- Read something positive daily – what I read (book title):
- Listened to motivational or sales training audios daily
- Worked 9-10 hours Mon-Fri
- Did 25-30+ demos this week
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NEW AGENT WEEKLY REVIEW

Week 8

- Completed and turned in a WGP by Sunday night
- Used a goal card every day/worked each day by goal periods
- Hit daily start & stop times (from WGP) every day
- Read something positive daily – what I read (book title):
- Listened to motivational or sales training audios daily
- Worked 9-10 hours Mon-Fri
- Did 25-30+ demos this week
- Called my trainer daily with questions or to share good news
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NEW AGENT WEEKLY REVIEW

Week 9

- Completed and turned in a WGP by Sunday night
- Used a goal card every day/worked each day by goal periods
- Hit daily start & stop times (from WGP) every day
- Read something positive daily – what I read (book title):
- Listened to motivational or sales training audios daily
- Worked 9-10 hours Mon-Fri
- Did 25-30+ demos this week
- Called my trainer daily with questions or to share good news
- Protected 3+ families this week or did my best to get families protected (50+ hrs/25+ demos)
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NEW AGENT WEEKLY REVIEW

Week 10

- Completed and turned in a WGP by Sunday night
- Used a goal card every day/worked each day by goal periods
- Hit daily start & stop times (from WGP) every day
- Read something positive daily – what I read (book title):
- Listened to motivational or sales training audios daily
- Worked 9-10 hours Mon-Fri
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NEW AGENT WEEKLY REVIEW

Week 11

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- Worked 9-10 hours Mon-Fri
- Did 25-30+ demos this week
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- Positive self-talk daily throughout the day
- Plugged into at least 3 conference calls
- Reported my stats every night when I finished for the day

GRADE FOR THE WEEK:

- A+ = 12
- A = 11
- B = 9-10
- C = 7-8
- D = 5-6
- F = 4 or less

CONTINUED ON NEXT PAGE

What were 5 good things about this past week?

1.

2.

3.

4.

5.

- Where did I make progress this week?
- What was the most valuable lesson I learned this past week?
- What one area can I work on that will have the biggest positive impact this week?
- This is a great career because....

NEW AGENT WEEKLY REVIEW

Week 12

- Completed and turned in a WGP by Sunday night
- Used a goal card every day/worked each day by goal periods
- Hit daily start & stop times (from WGP) every day
- Read something positive daily – what I read (book title):
- Listened to motivational or sales training audios daily
- Worked 9-10 hours Mon-Fri
- Did 25-30+ demos this week
- Called my trainer daily with questions or to share good news
- Protected 3+ families this week or did my best to get families protected (50+ hrs/25+ demos)
- Positive self-talk daily throughout the day
- Plugged into at least 3 conference calls
- Reported my stats every night when I finished for the day

GRADE FOR THE WEEK:

- A+ = 12
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