

New Agent Checklist

We are so excited to have you join our agency! This is a checklist of things you will do, to move you seamlessly through the onboarding process. We highly suggest printing this and checking off steps/tasks as they are completed. You can find more information and downloads on our team site, agenttraining.info.

- CREATE EMAIL ADDRESS:** We HIGHLY suggest that you create a new G-Mail account. You will be getting loads of new emails and it's better to stay organized this way.
 - Use firstname.quility@gmail.com
 - *If first name is taken, then use your lastname.quility@gmail.com*
 - With your New Email, send an email to your hiring agent so we have your contact information!

- PRE-LICENSING COURSE + EXAM:**
 - Registering for Course
 - Create your account using your G-mail account!
 - Go to "<https://www.xcelsolutions.com/insurance-license/>"
 - Follow the prompts
 - Select your state
 - Select Life AND Health
 - Enter manager's code for discount: **sfgsmith**

 - Scheduled Test: Date of test: _____
 - Note: Test date should be within 10 days of registration.
****Please text your hiring agent with the date of your test.

- NEW AGENT WELCOME CALL:** Mondays 12pm CST, This is a one time call for YOU, but we offer it each Monday. You will want to make sure to make one of these New Agent Video Calls, as soon as possible.
 - <https://us02web.zoom.us/j/8429071427>

- ADD THE CALL SCHEDULE TO YOUR CALENDAR:** agenttraining.info

- **BUILDERS**: It's important to have running buddies to challenge and support you in this business. Don't do this alone! Create a list of the 20 sharpest people that you know. **Do not reach out to them**, we'll talk about the what, why, and hows first!

- **GROUP PLATFORMS**: This is where we communicate as an agency, do training, share resources, and celebrate each other! If notifications are too much for you, please mute the threads but check in regularly!
 - Telegram (how to): [Telegram Instructions](#)

- **5 Voices Assessment**: It's imperative that we live the team mentality. We are going to be playing on the same field and working together. By knowing ourselves and knowing others, we are going to be able to know HOW to communicate and help each other!
 - [5 Voices](#)
 - Post to our group-chat thread "5 Voices" with your results.

- **HEADSHOT**: Email a headshot to your hiring agent to be used when you are being celebrated!
- **PASS STATE EXAM- YEAH!!**
 - Be sure and let your mentor know!

- **APPLY FOR LICENSE**:
 - Instructions for your state can be found on the NIPR website at nipr.com
 - Apply for Resident License.
 - Each state has their own requirements; some states will require you to be fingerprinted. Be sure you follow the appropriate licensing process for your resident state: <https://prepare2pass.com/requirements>

- **AML TRAINING**: while you wait for license approval, please complete AML training. This training will be needed in the near future when we begin carrier contracting.
 - [AML Training](#)
 - Leave NPN Blank (select: unlicensed)
 - Leave Agent Number Blank
 - It's not possible to "fail" this test so feel free to keep failing
 - Download and SAVE the PDF

- E&O INSURANCE:** While you wait for license approval please obtain E&O insurance. Though it isn't required, **we highly recommend it!** Some carrier's that we work with require E&O, and you will not be able to do business with those carriers without it.
 - [NEXT Insurance](#)
 - [Visual Aid of Steps —> Click Here!](#)

- LICENSE APPROVAL:** Once you receive your state license approval you will want to be on the lookout for your NPN number. This number is needed for your SFG application and can be found online within 24-48 hours of receiving your state license number.
 - State License #:
 - NPN Number (<https://nopr.com/help/look-up-your-npn>):
 - TEXT Hiring Agent that you have received both

- SFG APPLICATION:** You will receive an email from Symmetry Onboarding with a link to create an account with our onboarding system, as well as an invitation to complete your SFG application. Please fill this out as soon as possible and from a desktop - not a mobile device
 - **This is time sensitive**

- SFG APPROVAL:** Once your application is approved by Symmetry, you will receive an email welcoming you as a new agent. This email will include how to access Quility HQ (our agent portal), as well as a login to our CRM (OPT!) which is the lead system.

- SureLC EMAIL:** Check your inbox + spam frequently for an email from SureLC. You will receive instructions on how to create a profile and start the contracting process.
 - **This is where our carrier contracting is handled and should be done ASAP**

- SUBMIT FIRST APPLICATION:** We recommend all new agents write an application on themselves, spouse, or child as soon as they get OPT login credentials. This can be a large or small policy - it does not matter! What matters is that you experience the process. Doing so, will familiarize you with our quoting tools, the e-application process, and give you an idea of what the client experience is like. It is also a great time to work out any kinks you may have on your end before writing on a lead or warm market client. Please connect with your hiring agent to begin this process.

NEW AGENT TRAINING: Work through the training links below as you have time. This training will be super helpful in being successful here as an agent.

- **Agency Training Material:** More to come soon!
 - Dial Script
 - [Best script](#)
 - [COE](#)
 - Mortgage Protection
 - [Full Payoff](#)
 - [Critical Period](#)
 - Life Insurance
 - [Final Expense](#)
 - Digital Leads
 - Coming Soon
 - Live Example
 - [80% Close Ratio - Nate Auffort](#)
- **Get familiar with Virtual Mentor:** sfgvirtualmentor.com
- **Get familiar with :** [Carrier Cheat Sheet](#)
- **SUMMIT:** Found in HQ (little mountain icon top right)

PRACTICE APPOINTMENTS: We are transitioning from studying, which is Low Repetition and High Learning and transitioning into Low Learning and High Repetition. Our most experienced and successful agents run 10-15 practice appointments with friends and family to gain experience on the “how to’s” of running an appointment.

- Text your upline when you reach this step and you’ll go through the process together!

SEASONED NEW AGENT: Your first goal should be to reach SNA (seasoned new agent). This is achieved by writing 6 applications in 6 weeks (your timer starts as soon as you receive OPT! access). Agents that achieve this have a 95% increased probability for success!

- #1 app _____ **Congrats! New Writer!**
- #2 app _____
- #3 app _____
- #4 app _____
- #5 app _____
- #6 app _____ **Congrats! Seasoned New Agent!**

- **PROMOTION:** your first goal is to promote your commission level. You can do this one of two ways - as a producer or builder. Please talk with your hiring agent about the two track options. You can also earn a SLINGSHOT Bonus (details below).
 - [PROMOTION GUIDELINES](#)
 - [SLINGSHOT BONUS](#)