SENIOR SOLUTIONS AGENT CHECK LIST

1. AGENT CONTRACTING PROCESS

- ☐ Click on the e-contracting link **SuranceBay** and register by creating a log-in ID and pass word
- ☐ Complete the e-contracting by answering all questions and e-sign the document
- ☐ Upload or fax all required docs, Voided Check etc.
- ☐ Select each carrier you are wanting to be contracted with one-by-one
- ☐ Confirm e-contracting via e-contracting email confirmation
- ☐ Verify with manager e-contracting is completed and submitted to the carriers
- ☐ Receive writing numbers from each carrier
- ☐ Watch the New Agent Orientation video
- ☐ Welcome Email: Go through all training materials in the welcome email

2. ORDER YOUR LEADS

- ☐ Talk with your manager and discuss lead budget and strategy
- ☐ Order reoccurring "A" leads based on your investment budget and desire
- ☐ While waiting on your "A" leads to come in order B, A- and telemarketing leads
- ☐ Order Facebook leads

3. ORDER AGENT & CARRIER SUPPLIES

- ☐ Order New Agent Starter Kit
- ☐ Order Applications, Brochures, Folders and other needed supplies from each carrier
- ☐

4. AGENT TRAINING

- ☐ Read agent manual "The Magic Formula" cover to cover
- ☐ Memorize sales scripts In-Home presentation, Door Knock, Phone and Objections
- ☐ Review all training on agents websites www.SeniorSolutionsAgents.com
- ☐ Watch all training videos and recorded calls
- ☐ Attend all training webinars and conference calls
- ☐ Senior Solutions Friday Training Webinar 10:30 Central Time