

# Onboarding Workflow

September 2020

## A Recruiter Successfully Enters Their Candidate into The Onboarder's pipeline when the following steps have been completed:

1. Confirm that Candidate has PAID for Xcel pre-licensing course
  - a. ACTION: Mark the “**LICENSING COURSE**” field as Xcel
2. Confirm with Candidate an established Sales School class type & estimated date
  - a. ACTION: Once you know these, mark as such in their CATS profile
3. Fill out the following necessary CATS fields:
  - a. ACTION: Fill in - **Name / Phone / Email / State Selling In / Pay Plan / FHL Recruiter Credit**
4. Next, complete a proper baton pass to Michelle Bailey, using (623) 252-9601 or michelle@ibgfhl.com
  - a. ACTION: 3-way text, 3-way call OR 3-way email (choose one)
5. Once the baton pass is done, filter this person into the Onboarding queue via CATS
  - a. ACTION: Enter 'Michelle' in “**ONBOARDING**” field

The importance of the baton pass is to properly **EDIFY** the Onboarder & their role with this new recruit. From the hiring process, this new recruit knows you, the recruiter, the best at this point in time. Now for onboarding, you want to properly help this recruit feel fully taken care of as they are moved into the next stage of the process.

Please remember to **NOT** place a person in the Onboarder's pipeline until ALL steps above are complete

---

For links to further instruction or reference on any of the steps above:

**“CATS Onboarding Tutorial”**

*(Find these PDF instructions on your Agency websites' “Leadership Resources” page)*

Michelle Bailey  
**Onboarding Specialist**  
**(623) 252-9601**  
**michelle@ibgfhl.com**

#### BATON PASS SCRIPT

#### **3-Way Text (OR amend script for 3-way call)**

[Name], meet Michelle. Michelle, meet [Name].

[Name], Michelle is an absolute rockstar who has been great at all parts of our business. She will be partnering with you to develop as much as possible before next week's class. Please keep in mind, Liz Manning will be your go-to for paperwork, details and appointment. Michelle is going to coach you on how to hit the field at full speed.

Staying in consistent communication with her from now until Sales School is a REALLY good idea! Following her lead is THE best thing you can do to get ready for this career. Michelle will be in touch soon to get the two of you started in this next process – onboarding

Let me know if you have any questions. Thanks

#### **3-Way Email**

Hi [Name],

Now that your licensing process is under way, I want to introduce you to our Onboarding Specialist, Michelle Bailey. I have included her on this email, and her contact info is below:

Michelle Bailey  
(623) 252-9601  
michelle@ibgfhl.com

Her role over the coming weeks is to guide you through the licensing & appointment process. While Liz Manning will be the point person for all of your new agent paperwork, and handling your Sales Academy booking and correspondence. Michelle will introduce you to Liz further on as you proceed. As we have discussed throughout the hiring process, timely communication is *critical* to your success, and ultimately to getting you off to a fast start! If you miss a call or message from Michelle or Liz, please get back to them in a timely manner (within 12hrs). There are a lot of moving parts between licensing, training classes, hotel reservations and trainer availability, so we need to make sure everything is in order for you to have the smoothest transition possible. Have a great day!