

Onboarding Workflow

March 2022

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
 - b. ACTION: Mark the “**LICENSE TYPE**” that the new hire is studying for — it will either be **HEALTH ONLY** or **LIFE AND HEALTH**
2. Confirm with Candidate an established Sales School class type & **estimated date** (please don't promise a Sales School week to a candidate)
 - 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 / iPad / Agency Owner / FHL Recruiter Credit / Field Trainer**
4. Next, complete a proper baton pass (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: Type '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 link 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)

Role Reminders <i>During</i> Onboarding Process		
<u>Onboarder (Michelle)</u>	<u>Executive Admin (Liz)</u>	<u>Recruiter</u>
Helping through pre-licensing course	Paperwork and processing to FHL appointment	Completing steps above to start the baton pass over to the onboarding process
Preparing to pass the state exam	Check for miscellaneous extra forms that need to be cleared up (court charges, W9, fast cash, marketing agreements, etc)	Share good news stories from field
Becoming licensed with the state	Gathering SOAR numbers, getting mobile access, SAS forms, etc	Conversations about goals and vision for business
Sales Academy prep and logistical details	Send the final Sales School itinerary	Once Michelle has emailed out Core 4 — set up Zoom call with agent to help them practice the Core 4 <u>Word4Word</u> .
Core 4 memorization & accountability	Finalizing administrative activation of new agent	Conversations about expectations of communication, results, training
CATS updates on <i>appropriate</i> items	CATS updates on <i>appropriate</i> items	CATS updates on <i>appropriate</i> items
Xcel – Study Course details	FHL/AO paperwork	New agent success stories. Eagles & Testimonials
Pre-Licensing requirements per state	Background check requirements	Field Training schedule & expectations
Study tips	Background check extra documentation	Conversations about field training schedule and plan
Study accountability	Assistance with ordering business cards	First month goals/monthly cash bonus
Any/all changes to testing dates, study schedule	Sales Academy hotel reservations	First quarter goals/quarterly incentives
License application questions	FHL mobile app access	Canvassing charts/Importance of tracking, reporting, recording stats
Sales Academy flight	SOAR number administration	Overview Sales Rabbit
Sales Academy expectations / preparations	FHLconnect access	Share YOUR Story - If I knew now...
**Virtual Sales Academy Day 1 zoom call — practice approaches	Final activation	Spousal support & involvement
		Habits, Skills, Attitude. Overcoming fear & obstacles
		Agency core principles & values

BATON PASS SCRIPTS

March 2022

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

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 up with you to develop as much as possible before your Sales School week.

Please keep in mind, our Executive Admin, Liz Manning will be the one you go to for paperwork, details and appointment. Michelle is the one who is going to coach you on how to hit the field at full speed.

Staying in consistent communication with Michelle and Liz from now until Sales Academy is a REALLY good idea! Following their 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 the onboarding process.

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 Morales. I have included her on this email, and her contact info is below:

Michelle Morales
(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!

From this point on, here is everything the Onboarder completes for each new hire:

Onboarding Process Step-by-Step:

- **Automated Bomb-Bomb Video Campaign** - Once I receive a baton pass from a recruiter for a new candidate, I go on CATS and find their profile (only if my name has been typed in the 'Onboarding' field). I then copy and paste their email into the "[Michelle - Auto Onboarding](#)" automation campaign. This campaign has video messages done by Travis Wilson.
 1. "[Impact – Our Products](#)" – Sent 1 minute after onboarding begins
 2. "[Our People](#)" – Sent 1 day after onboarding, at 10:30 am
 3. "[Impact – Our People](#)" – Sent 2 days after onboarding, at 1:00 pm
 4. "[Impact – Work Hard, Study Hard, Be Coachable](#)" – Sent 2 days after onboarding, at 2:00 pm
 5. "[Impact – What You Will Someday Be You Are Now Becoming](#)" – Sent 3 days after onboarding, at 8:00 am
 6. "[Impact – Our Payoff](#)" – Sent 4 days after onboarding, at 10:30 am

- **Welcome Email / Intro to Onboarding Steps** -
 - After the candidate is added to Bomb-Bomb campaign, I then email the "[Michelle - FHL Welcome Package](#)" through CATS.
 - This includes: further introduction, state specific license instructions and coaching, onboarding checklist (distinguishing between Michelle and Liz items), and link to *The Elevators Podcast* done by Dillon and Courtney Buck.

- **Scheduling via text/email Welcome Call (1 day after Welcome Email is sent)** -
 - ◆ *Goal of texting candidate:* Making sure that they actually read / received the email before the Welcome Call and to set a time/date in calendar so they will most likely answer.
 - *"Kimberly, I look forward to connecting with you soon. Please reach out after you have read through the FULL onboarding email, and then we can schedule a time to chat on the phone. Thanks! — Michelle, Family Heritage"*
 - Once candidate responds that they have read the email (including both PDFs) I then schedule a time for a quick 10 minute Welcome Call the next day.
 - ***Sometimes the agent will respond to your Welcome Email with available times to connect. If that is the case, then you can skip the text message***

- **Welcome Call (1 or 2 days after Welcome Email is sent) - 7 minute call**

- ◆ *Goal of call:* official welcome to the onboarding process, understanding of my role vs. Liz's role, they have an exam date or at least a study plan set up, are aware of pre-requirements, we discuss potential SS weeks, and last, a verbal introduction to Liz.

"Hey _____, this is Michelle with Family Heritage. Now, this call will be quick but I just wanted to give you an official welcome call, explain the email I sent and then go ahead dive a little deeper into my role in all of this. _____(name)_____ it's my job to support you through the licensing process and your initial training until you arrive at sales school. So, really what that means is that from this point until you arrive at sales school, I will be your new go to person for any questions or updates when it comes to things like licensing and training. That's what I'm here for. Now after this phone call, I will be introducing you to our Executive Admin, Liz Manning. She will be assisting you in all of the new agent paperwork as well as any other administrative needs. Make sense?"

Perfect — now is your test scheduled and do you have a study plan set up {talk through this} ok:

When can you get that done? - email me that information once it's done

OR

Awesome! What is that information?

I can see your study progress and will be checking in to make sure studying is on track, so don't be surprised if you get texts from me complimenting you on your progress! {if their state has pre reqs talk about that} After you pass your test, I will give you a call to go over the next steps, which includes applying for your license, booking flights if needed and memorizing a Sales Talk.

Lastly, do you have an Apple iPad to use for Sales School?

Yes - Great!

OR

No - okay, no worries. We recommend iPads that have 32GB of storage or more.

A requirement is that the iPad must run on iOS 11.0+.

Any of the newer models are great - please let me know if you have any more questions about that.

Now in the Welcome Email there was a link to a podcast episode —were you able to listen to that?

Wonderful!! What did you take away from it?

OR

No - okay not a big deal. Do you think you could listen to that today and we follow up tomorrow about it? Great :)

After this phone call I am going to introduce you to Liz via text message and what she is going to do is email you a 20 minute application. As soon as you complete that application, it gets your background check started within the company, so make sure to look out for that email either today or tomorrow, okay?

Great, so I will check in with you next week, but if you have any questions in the meantime shoot me an email/text."

- **Baton Pass via text / email to Executive Admin - right after Welcome Call**

- "(First Name), I want to introduce you to our Executive Admin Liz! Along with managing the office, Liz brings 5 years of direct sales

experience and insight. Her role over the coming weeks is to guide you to get all of your new agent paperwork completed, handle your Sales Academy booking, as well as making sure you're appointed by Globe Life - Family Heritage Division and then registered. Liz, meet (First and Last Name)!"

- **Admin to Connect with New Agent and Send off E-onboard/new hire paperwork**

- Once new hire paperwork is complete, admin sends the corresponding pay plan DocHub paperwork for the agency.
- *(IN BACKGROUND)* - once new hire paperwork is submitted to Agent Licensing, Admin watches to see if background check clears for appointment or if anything is missing or needed to clear out.

****From this point with the *Admin* side of things, it is based on when the agent gets paperwork in / their background check**

- **After both sets of paperwork are completed**

- Email FAQ packet specific for their Sales School (**after** e-onboard paperwork is complete)
 - [MSP packet](#)
 - [Virtual packet](#)
 - [Regional packet](#)
- And after 3-4 business days (**this time period fluctuates*) after the new agent has submitted their new hire paperwork, admin will receive notifications if there are any issues with the background check OR miscellaneous extra forms that need to be cleared up (court charges, W9, fast cash, marketing agreements, etc).
 - ****IF court charges appear on the background check, Sales School date will need to be re-evaluated****
 - Once agent sends in ALL required documents, 2-3 business days are usually needed to give Licensing & Legal enough time to review and make their decision.
- *On the Monday* preceding the next week's Sales School class, admin to begin preparing the next week's class (checking paperwork, gathering SOAR numbers, getting mobile access, SAS forms, etc)
- *On Wednesday* admin will start to finalize hotel accommodations for those attending the next week's class
- *Thursday morning* - admin to send the final Sales School itinerary (GOAL: before noon on Thursday) to agents. Details include Sales School schedule, hotel & office directions, hotel check in information, dress code, what to bring, etc.

****From this point with the *Onboarder* side of things, it is based on the new agent and when they get their exam scheduled / SS week**

- **Check on Candidate**

- Checking study progress, making sure they got their exam and fingerprints (if state requires) scheduled, pre-requirement check in (20 hours, CERT, etc.), verifying iPad status.

- **Pre-Exam / Exam Time / Next Steps**

- The day before the exam (sometimes 2-3 if before a weekend) I send the '[Crush Your Exam](#)' email/video & confirm they have everything they need for the test
 - The email states to let them know to text me after they are done with the test.
- Once they have passed, I send the corresponding *Next Steps email* (*different emails for MSP B2B or Virtual Residential*).
 - This email explains how to apply for their Resident Producer License, has the links to the Core4 / full script
 - MSP B2B: [Link to Core 4](#)
 - Virtual Residential: [Link to Core 4](#)
- Next Steps Call:
 - Pump them up! Exam is passed!
 - Apply for license
 - Check on fingerprinting — if needed by state & not already completed
 - Verify iPad (iOS 11 or higher)
 - **MEMORIZE CORE 4**

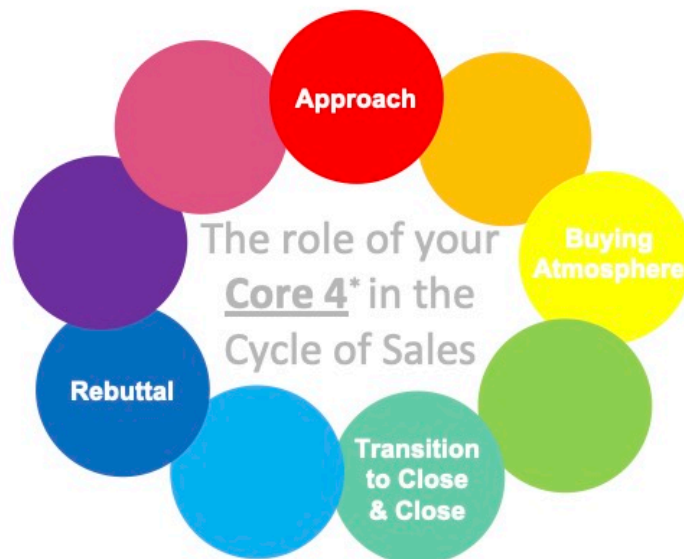
- **Booking Flights (if needed)**

- ◆ The rule of thumb is that if an agent has a drive to Sales School that is **7 hours or more**, then they can book a plane ticket and we will reimburse them *up to \$500*.
- I advise any new agent to not book their flights until they have a cleared background check from Agent Licensing and they have passed their state exam.
- Once both of those are complete, I then will call the agent to go over flights and how reimbursement works.
 - *“(Name), We are so excited to get you to Sales School! Now with flights, basically how it works is you will book the ticket and then we will refund you up to \$500 **the week after you complete Sales School**. Class starts on Monday at noon, meaning if you fly on Monday, the **LATEST** your flight can land is 10:30am. If that isn't possible or there are no flights that land early enough, then you can fly on Sunday evening. Thursday, class ends at 4pm. Meaning you will want to fly out of Minneapolis either at 5:30pm or after on THURSDAY. The*

*airport you'll be flying into is MSP. Some good sites to use are Kayak.com, google flights, and Southwest Airlines. **We don't reimburse for first class tickets so I would do economy only and you won't need a rental car. The hotel will provide a shuttle. Once you have these flights booked, please go ahead and email me the itinerary and receipt - thanks!"*

- **Prepare for Sales School**

- Periodically checking in on how memorizing the core 4 is coming along and go over any questions that may have come up since the last discussion
- Email out "[Michelle - Checking in - Core 4 Visual](#)"
 - ◆ This is emailed out to make sure they are working on memorizing the Core 4 and there is also an image attached (see below) that helps show the difference in the Core 4 / Full Script



*The circles that are NOT listed will be filled in by your FULL script.

- *"Hello (Name), First of all, I just wanted to check in today and see how Memorizing the Core 4 is coming along? Your Sales Academy is scheduled for next week (__/__), so I want to make sure you've had all of your questions answered about the sales script. Additionally, I went ahead and attached a visual to this email to show you how the Core 4 fits into the full sales script Please let me know if you have any more questions."*

- **Sales School Prep Call - Thursday before SS**
 - AFTER they've been approved by me & Liz for SS, then I will have a SS Prep call
 - Let them know how excited we are to meet them!
 - Make sure they don't have any more questions
 - Core 4 memorized (at least approaches)
 - iPad is verified (iOS 11 or higher)
 - Go over how to be prepared for SS (expectations)
 - Friends and Family discussion
 - *"One of the things you'll talk about in class is how to present this product to the people you're close to without being the awkward insurance sales person. There will be a time to set some appts with people with a strong suggestion to make a list of people you might want to reach out too. Now your success here isn't dependent upon presenting to your inner network, but if we believe in a product we should want to make sure the people closest to us know about it, and also it's the best way to get some reps in where there is a lot of room to make mistakes because they already care about you. A good filter for you to run your friends through is "hey, would I toss \$10 at a GoFundMe if I saw they were going through something our policies could protect against" or "if I saw they were battling cancer/had a stroke/had an accident, would I feel bad that I hadn't offered this to them"*
 - Admin emails Final SS itinerary email either on Thursday or Friday before Sales School
-
- **Sales School & Final Step**
 - Candidate successfully arrives in Sales School and is officially removed from my pipeline & into hands of Sales Trainer.

FAQ's

- At what point do they leave onboarding?
 - ◉ When they successfully arrive in Sales School
 - OR
 - ◉ When they have been uncommunicative for 7 consecutive days and I have reached out via call, text and email

- What happens if someone is removed from the pipeline & then comes back in?
 - ◉ To be reinstated into the onboarding process, it is important that the candidate speaks to the recruiter first, then notify the Onboarder again before being placed back into the pipeline

- What if the new hire signs up for the wrong course on Xcel Solutions? How do they fix that?
 - All the new hire needs to do is call Xcel Solutions customer service line and let them know that they accidentally signed up for the wrong course. Make sure the new hire knows EXACTLY what course they need to switch to before calling. They will either want HEALTH ONLY or LIFE AND HEALTH. Xcel Solution's phone number: **(904) 999-4923**
- What does completing the licensing process look like and when are we confident someone is ready for SS?

MICHELLE:

- Passed exam 5-7 days before SS date
- Has license application confirmation to you by the next day if possible (except IL)
- Core 4 - MB & agent have had conversation about purpose of Core 4
- iPad - have confirmed they have or know they need it by the start of SS
- Flights done by Friday at 2:00p

LIZ:

- New hire paperwork done 5 business days before SS date
- Background check passed by A/L
- DocHub completed
- Hotel - especially Sunday arrivals

****see checklist on next page to understand the things that Liz and I need before we both can approve someone for SS.**

Addendum A – Onboarding Checklist

GLOBE LIFE – FAMILY HERITAGE DIVISION Onboarding Checklist

Start to Finish – The Road to Arriving to Sales Academy as a Licensed Agent

This list is designed to be a helpful overview of everything we will all work through together.

Use this list to keep track of your progress!

Our goal here in onboarding is to make sure you are a licensed, appointed and active agent who is ready to write business as soon as you leave sales school!

MICHELLE BAILEY (Onboarder) helps you take care of:

- Schedule your State Exam**
- Schedule your Fingerprinting appointment** (*if your state requires this; see your pre-licensing doc*)
- Complete Proctored Exam for Certificate of Completion (*if your state requires this; see your pre-licensing doc*), and then **PRINT** this Certificate to bring to your state exam
- Pass your state exam!
- Apply for your Resident Producer's License** (email confirmation of application to Michelle)
- Memorize your Core 4 for Day 1 of Sales School (sent after you pass your state exam)
- Check that your iPad is ready and compatible (iOS 11.0 or above)
- Check that you have **received** and **read** through the Sales Academy FAQ packet Michelle sent you

LIZ MANNING (Admin) helps you take care of:

- Complete your FHD new hire paperwork within 24 hours of when it is sent (in your inbox, this will come from FHLNoReply@Globe.Life)
- Complete the DocHub (Agency) paperwork sent to you
- Order business cards (*optional*)
- Clear your schedule for the week following sales school (you'll discuss your first week of training with your field trainer during Sales School)
- Look for your final Sales Academy itinerary in your inbox by the **Friday** before your training week

To be finalized and approved for Sales School, have you:

- Had your final Sales Academy prep call with Michelle?
- Received your Sales Academy itinerary from Liz?

If both of these are not checked off, you have not been confirmed yet – contact us!