

NEW TEAM MEMBER ONBOARDING & TRAINING SCHEDULE

Complete the following onboarding plan once a P&C license is obtained

Day 1 - 2: Company Required Training To Get Binding Authority

Day 3: Insurance Made Simple

Day 4: Internal Systems Training

- Lead Management System
- Phone Systems
- Documenting Notes - Magical Chrome Extension
- Tremendous Gift Card Platform
- Lead Vendors Accounts

Day 5 - 6: Prepare Mock Quotes

- Auto (10 Quotes)
- Renters (10 Quotes)
- Homeowners (10 Quotes)
- Umbrella (5 Quotes)

Day 7 - 8: Insurance Sales Lab | One Call Close Masterclass

Day 9: Putting It All Together

Present five mock quotes via Loom going through the **6-Step Script To A One Call Close**

- 1) Outbound Auto + Renters
- 2) Inbound Auto + Renters
- 3) Outbound Auto + Homeowners
- 4) Inbound Auto + Homeowners
- 5) Outbound Homeowners + Auto
- 6) Inbound Homeowners + Auto

Day 10: Final Certification

Present Verbatim:

- Step 1: The Hook (*Versions: Auto Outbound, Homeowners Outbound, Auto Inbound*)
- Step 4: Cost Presentation (*Versions: Auto + Renters, Auto + Homeowners*)
- Step 5: Asking For The Sale

INSURANCE MADE SIMPLE

Explain the following terms in layman's terms so that a teenager could understand

Auto

- Liability
- Bodily injury
- Property damage
- Comprehensive coverage
- Collision coverage
- Underinsured Motorist
- Uninsured Motorist
- PIP (Personal Injury Protection)
- MedPay
- Emergency Roadside Service
- Rental Reimbursement

Key Terms

- Premium
- Deductible
- Endorsement
- Declaration Page
- Binder
- Named Insured
- First-Named Insured
- Mortgagee Clause
- SR-22
- At-fault
- Carrier
- EFT
- Insurer
- Insured
- Underwriting

Home

- Coverage A - Dwelling
- Coverage B - Other Structures
- Coverage C - Personal Property
- Coverage D - Loss of Use
- Coverage E - Personal Liability
- Coverage F - Medical Payments
- Replacement Cost Coverage
- Actual Cash Value
- Service line endorsement
- Back up of sewer and drain endorsement
- Extended replacement cost
- Limited matching roof and siding

Other Concepts

- Difference between Homeowners and Renters insurance
- Difference between Homeowners and Rental Dwelling Policy
- Time allotted for insured to add a newly purchased vehicle to their policy
- Minimum coverage for a financed car