

NEW TEAM MEMBER ONBOARDING & TRAINING SCHEDULE

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

Day 1: Company Required Training

Day 1: Insurance Made Simple

Day 2 - 3: Insurance Sales Lab | One Call Close Masterclass

Day 4: Internal Systems Training

- CRM
- Phone System

Day 4: Prepare Mock Quotes

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

Day 5: Complete 10 Live transfers to sales team

Day 6: Final Certification: Complete call from beginning to end with team lead

INSURANCE MADE SIMPLE

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

Auto

- Bodily Injury Liability
- Property Damage Liability
- 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
- Escrow

Home

- Coverage A - Dwelling Replacement
- Coverage B - Separate Structures
- Coverage C - Personal Property
- Coverage D - Loss of Use
- Coverage E - Personal Liability
- Coverage F - Medical Payments To Others
- Replacement Cost Coverage
- Actual Cash Value
- Scheduled Property
- Service Line endorsement
- Back up of sewer and drain endorsement
- Extended replacement cost
- Equipment breakdown endorsement
- Limited Leakage and Seepage
- Mold Coverage
- Roof Types (Hip/Gable)

Other Concepts

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