



## **PREP GUIDE: GET READY TO DIAL**

### **★ During Contracting Process**

- Download, print out and learn the Telesales Script
- Log Into Best Plan Pro; practice using the underwriting & quoting features
- Sign up for SAVVY CRM; review [tutorial videos](#) and explore the platform
- As each of your carrier writing numbers arrive:
  - Create your carrier portal log-in
  - Navigate to their E-App & practice filling it out
- Download these apps:
  - Notability: Where you will store carrier documents
  - Turboscan: Where you will store all of your applications
  - GroupMe: Where you will communicate with ORCA
  - Outlook: Where you will have your ORCA email

### **★ Purchase Leads**

- Reference Lead Guide

### **★ Your Workspace**

- Dial in a quiet, distraction-free area
- Keep your desk/work table as clean/clear as possible
- Purchase a headset or use reliable headphones for high sound quality
- Open, log-in and prepare your web tools in browser tabs:
  - Leads spreadsheet and/or CRM
  - Underwriting Toolkit
  - Carrier E-Apps
  - Email

**Follow the Script!**