

THE SYSTEM MANUAL



Inspiring Families To Dream Again!

BUILDING PHASES

PHASE 1

RECRUITING VOLUME

Prospect → Trainee

PHASE 2

THE NEW ERA SYSTEM

Trainee → Trainer

PHASE 3

LEADERSHIP DEVELOPMENT

Trainer → EMD

NEW ERA SYSTEM PHASES

PHASE 1

- Client Experience
- Start Building An Agency
- Fully Licensed
- Set 10 Field Training Appointments

PHASE 2

- Complete 10 Field Training Appointments
- Net License
- Promoted to Associate or Senior Associate

PHASE 3

- CFT In Progress (Must Complete 10 Field Trainings)
- Certified Field Trainer

PHASE 4

- Marketing Director
- \$50,000 Watch

PHASE 5

- \$100,000 Ring
- Executive Marketing Director

PHASE 1 SCHEDULE

(Avg. Hours: 4)

Week 1:

- Complete Week 1 Onboarding
- Schedule Test Date
- Complete Client Experience
- Attend Fast Start School With Camera On

(Avg. Hours: 4)

Week 2:

- Complete Week 2 Onboarding
- Top 3 Potential Business Partners
- Business Partner Marketing Plan
- Pass Life License Exam
- Finger Printing & Apply For Life License

Week 2 Onboarding must be completed by an MD & Above

(Avg. Hours: 4)

Week 3:

- Complete Week 3 Onboarding
- ETHOR Script Training
- Set 10 Qualified Field Training Appointments

PHASE 1 GOAL:

Client Experience

- Client Experience

Licensed & Appointed

Licensed & Fully Appointed

- Pre Licensing Courses
- Schedule Life Quiz Test Date
- Fingerprinting
- Apply To The State For Your License
- Submit License To GFI
- Complete Success CE Courses
- Errors & Omissions
- Become Fully Appointed With Companies
- Setup Direct Deposit

Promotion Guidelines

Start Working Towards Associate Promotion

3 Directs

- Business Partner 1
- Business Partner 2
- Business Partner 3

3 Clients

- Client Helped 1
- Client Helped 2
- Client Helped 3

We Will Focus On Building You An Agency Within Your First 30 Days & Then Work On The 3 Families Helped Once You Are Licensed

PHASE 2 - 5 SCHEDULE

PHASE 2:

(MONTH 2)

- Complete 10 Qualified Field Training Appointments
- Earn Your Associate Promotion or Senior Associate Promotion
- Become a Net License

PHASE 3:

(MONTH 3)

- Become a Certified Field Trainer
- Master Top 5 Products

PHASE 4:

(MONTH 4 - 6)

- Earn Your Marketing Director Promotion
- Earn Your \$50,000 Watch

PHASE 5:

(MONTH 7- 12)

- Earn Your \$100,000 Ring
- Earn Your Executive Marketing Director Promotion

PHASE 2

Complete Training Appointments

Required:

- MACHO 1
- MACHO 2
- MACHO 3
- MACHO 4
- MACHO 5
- MACHO 6
- MACHO 7
- MACHO 8
- MACHO 9
- MACHO 10

Bonus:

- MACHO 11
- MACHO 12
- MACHO 13
- MACHO 14
- MACHO 15
- MACHO 16
- MACHO 17
- MACHO 18
- MACHO 19
- MACHO 20

NET LICENSE

- Make Your 1st \$1,000

Complete Associate Promotion

3 Directs

- Business Partner 1
- Business Partner 2
- Business Partner 3

3 Clients

- Client Helped 1
- Client Helped 2
- Client Helped 3

PHASE 3

CERTIFIED FIELD TRAINER

CERTIFIED FIELD TRAINER CHECKLIST

- Licensed & Appointed
- 10 Training Appointments
- Associate Promotion
- Do Presentation For Best Friend Or Spouse 10x
- Get Signed Off By Your Trainer
- Get Signed Off By 3 CFT's On 1st Appointment
- Get Signed Off By 3 CFT's On 2nd Appointment
- Get Signed Off By EMD & Above

WHAT YOU SHOULD KNOW

- Client 1st Appointment
- Client 2nd Appointment (Illustrations)
- Top 5 Products
- System
- Recruiting Interview
- Phone Scripts



PHASE 4

MD PLAN TO FOCUS

**45,000 POINTS
(3 Months)**

**5 Licensed
Agents**

45,000 Points

MONTH 1:

- \$1,250 In Premium

MONTH 2:

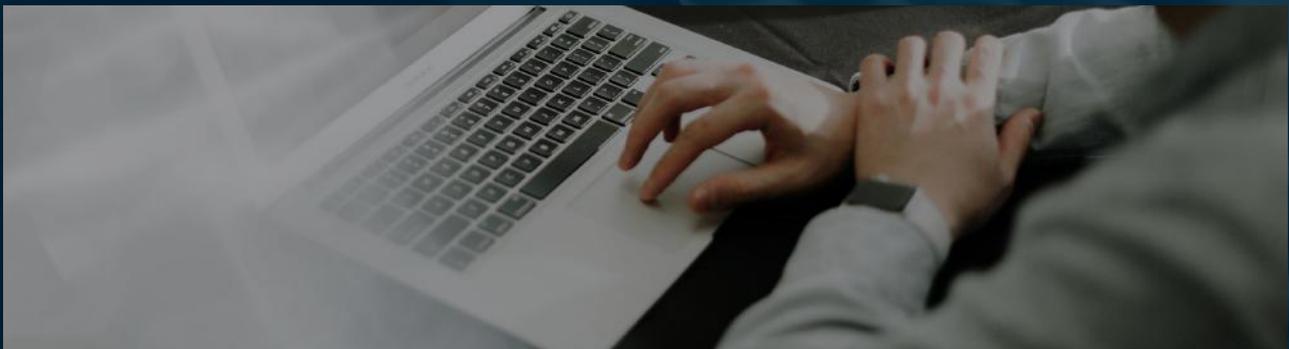
- \$1,250 In Premium

MONTH 3:

- \$1,250 In Premium

5 Licenses

- 1 License
- 2 License
- 3 License
- 4 License
- 5 License



\$50,000 Watch

- \$50,000 Watch

PHASE 5

Executive Marketing Director

- 150,000 Net Points In 6 Months or 240,000 Net Points In 12 Months
- 1/2 of Net Points Must Be Personal Points
- 12 Licensed Agents
- 1 Direct Marketing Director
- \$100,000 In Income



12 LICENSES

- 1 License
- 2 License
- 3 License
- 4 License
- 5 License
- 6 License
- 7 License
- 8 License
- 9 License
- 10 License
- 11 License
- 12 License

SYSTEM PROGRESSIONS

- Get Your Business Code Number
- Client
- Pass License
- Business Partner Marketing Plan
- Licensed & Appointed
- Complete 10 Qualified Field Trainings
- Associate Promotion or Senior Associate
- Net Licensed
- CFT In Progress
- Certified Field Trainer
- Elite Trainer (GFI Rocket Certified)
- Marketing Director
- \$50,000 Watch
- \$100,000 Ring
- Executive Marketing Director

SYSTEM OUTLINE : A - Z

Recruiting Interview:

- Schedule Week 1 Onboarding For The Following Day
- Schedule Them For Tomorrows Licensing Class
- Schedule Appointment With Spouse / Significant Other (Within 24 Hours)

Phase 1: (Complete Within 1st 30 Days)

Week 1 Onboarding:

- Schedule Personal Financial Review With Spouse
- Confirm Them For Licensing Class / Edify The Class
- Schedule Them For New Agent Onboarding School (Every Saturday @9am PST)
- Schedule Week 2 Onboarding

Week 2 Onboarding:

- Schedule Top 3 Potential Business Partners Interviews
- Complete Business Partner Marketing Plan
- Call Business Partner List & Start Building The New Agent An Agency
- Schedule Week 3 Onboarding

In This Week:

- Pass Life License Exam
- Finger Printing & Apply For Life License
- Make Sure They Are Participating In All Agent Training After Passing Exam

Week 3 Onboarding:

- ETHOR Script Training
- Set 10 Qualified Field Training Appointments

Phase 2: (Complete Within 1st 60 Days)

- Complete 10+ Qualified Field Training Appointments
- Earn Associate / Senior Associate Promotion
- Become a Net License (Leverage Ethos)

Phase 3: (Complete Within 1st 90 Days)

- CFT In Progress
- Become a Certified Field Trainer

Phase 4: (Month 4 - 6 In Business)

- Earn Marketing Director Promotion
- Earn \$50,000 Watch (Minimum)

Phase 5: (Month 6 - 12 In Business)

- Earn Executive Marketing Director Promotion
- Earn \$100,000 Ring (Minimum)