

**NEW AGENT BUSINESS PLANNING CALL OUTLINE 2021**

**OBJECTIVE:** Outline a clear vision for success. Clear defined road map.

* Remember, “Where there is no vision people parish”.
* Imagine each agent or dialer brings 5-10 people to the next conference

**PART ONE: GET TO KNOW THE AGENT - \*\*TAKE NOTES\*\***

* Where are you from?
* What did you do before?
* Why do you think SFG is the right fit for you?
* What are you looking to do Short Term (between now at conference?)
* What are you LONG TERM Goals?
* ***WHY DO YOU AGENTS WANT THESE GOALS? Dig IN!***

**PART TWO:** FIND YOUR AGENTS “NUMBER”

**What amount of AVP with what issue rate to pay bills/comfortable? \_\_\_\_\_\_\_\_**

* *FORMULA*

Take Target APV target x .70 contract=

\_\_\_\_ x .75 issue rate

\_\_\_\_\_ x .75 paid up front

= APV Target each week

= Divides by / $500 to $1000 in commission = leads per week?

= Average app is $1000 = How many apps do they need?

* GET SHORT TERM 6 WEEK COMMITMENT FOR START UP BUDGET FOR LEADS
* GET GMR FILLED OUT FOR THAT COMMITMENT (even if its just bonus leads)

They should have a clear understanding of:

-LEAD BUDGET SHORT TERM & LONG TERM

-APV NEEDED PER WEEK

-APPS NEEDED

-ISSUE RATE NEEDED

**PART THREE:** BUILDING TARGET

(If $50k year = 10 people at conference) How many people do they need at Conference to have them out of the field.

If didn’t ask before…

WHAT DO YOU WANT NOW?

WHAT DO YOU WANT IN THE FUTRE?

HOW MUCH ARE YOUR MONTHLY BILLS?

HOW WOULD IT CHANGE YOUR LIFE IF YOUR BILLS WERE PAID BEFORE YOU WOKE UP IN THE MORNING?

Make a recommendation for the longterm goals. Show how these are tied with getting people to conference. Show breakdown on how \_\_\_ people at conference in April will convert to \_\_\_\_\_.

* If we do all the training in the start, and building passive income starts with them just sharing the video, is passive income something they want?
* Determine number of conference registrations they need next conference to make that happen.
* Figure out where these people will come from? (Cold or Warm)
* SET COMMITMENT FOR CONFERENCE AND MEETING ATTENDANCE GOALS
* SET COMMITMENT FOR TIME SPENT BUILDING EACH WEEK (GET IT ON SCHEDULE)
* GET THEM MOVING AT LEAST 1-2 HOURS A WEEK OR TALKING TO 5-10 PEOPLE THEY KNOW EACH WEEK ABOUT SFG (PROJECT 100 in the next 30 days)
* Set a recruiting budget and time frame.
* Discuss a weekly commitment on building (talk to \_\_\_ people per week and how much time each week to allocate to this).

**PART FOUR:** PLAN FOR PERSONAL DEVELOPMENT

What are they reading now? Plans for developing?

* WHAT ARE THEY READING?
* HUDDLES
* HOW OFTEN? (MAKE SURE AT LEAST ON FIELD OR PHONE DAYS – 10 PAGES)
* WHEN WILL THEY FINISH THAT BOOK.

**PART FIVE:** RECOVER EXPECTATIONS

* ACCOUNTABILITY? -> COVER PLAN FOR THAT
* REACHING OUT. COMMON DENIMONATORS OF THOSE THAT MAKE THE INCOME YOU WANT:
  + - * They reach out every night before appointments
      * Use 911 string multiple times at the appointments
      * Call after for autopsy call.
      * Are on Zoom for dials
      * Reach out to communicate 5-10x a day when they are new.

\*\*\*\* GET CONFERENCE FORM FILLED OUT NOW\*\*\*\*

(I forgot to add, that we’ll want to get their conference form filled out obviously after that call too, cause right now it will be a matter of “how many people they are bringing”

Not “if they are coming”)

\*\*\* COLLECT GMR BY NEXT DAY

**PART SIX:** LOG NOTES IN BASECAMP -🡪Add “TO DOS”

* Get GMR, Conf Ticket, Building plan execution, Anything else discussed