

**NEW AGENT GOAL STRATEGY CALL OUTLINE 2019**

**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 conference in April?

**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 .60 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.

Make a recommendation for the long term 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.
* 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?
* 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 (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