



WHAT NEXT?

Carrier Supplies:

Once you receive confirmation that you are appointed with the insurance carrier: You need to log into the individual carrier website or call them directly to order supplies. **Columbian (CFG)** is 800-305-1335, **Transamerica** is 877-234-4848. **Mutual of Omaha** is 1-800-693-6083. **Madison National** is 1-800-356-9601 x 2811. **NGL** is 1-800-988-0826. They will ship Applications and Brochures directly to you. There is No Cost for this.

YOUR Agent Supplies:

Under the **YOUR Marketing Resources** tab, you should consider ordering:

1. ID Badge – Every Agent should have an ID Badge!
2. Flip Chart Presentation
3. Delivery Notices (To leave on the door)
4. Business Cards (Prescription Discount)

Leads:

Place your lead order!! Without leads, you are out of business. Take the time now to click on the tab “Proper Lead Ordering” and review the 2 training modules. Under the LEADS tab you will also see the Menu of options for ordering leads. Remember, Direct Mail leads (which are the best leads in the industry) take approximately 3 weeks for them to start rolling in. Contact your manager for advice and guidance on proper lead ordering. Remember, successful agents have an on-going lead order every week, that way you will have new interested prospects to see every week!

Preparation:

Preparation is the key to success! While you are waiting for your leads and brochures to come in.....begin preparing so that you will maximize every opportunity.

- Master the 9 Step Sales Process, which includes the Flip Chart presentation and 3 Option worksheet, Use the Video to help with preparation.
- Master the Objections and Rebuttals
- Master the Door Knocking Techniques. Use the Training Modules to learn how to properly approach a door and make the pitch and overcome objections.
- Prepare yourself for the competition AARP and Colonial Penn. Print off any necessary documents to bring with you to demonstrate your point.
- Review How to Properly Complete the Transamerica Application training located under the Transamerica tab on the YIG website.