abm
AGENCY BUILDER MODEL

FIELD TRAINING FOR SUCCESS

Field Training for Success

Owner's Creed

I am the owner of my business!

Starting today:

- I will take full responsibility for the success or failure of my business at Family Heritage.
- It is MY HABITS, MY SKILLS, and MY ATTITUDE that impacts the success or failure of my business more than anything else. If I am lacking in any of these areas, I will take the initiative to reach out to my fellow business partners for help and assistance.
- As I progress through my career, I will become better in the three core areas of my business.
    - R I own the **recruiting success** of my business.
    - R I own the **training success** of my business.
    - R I own the **sales success** of my business.
- From this day forward, I will look in the mirror and see the owner of my business. I will look in the mirror and say:

> "As the owner of my business, today I choose to succeed.
> Today I will be successful because… I choose to be successful."

____

Signature

____

Date

Welcome

Give a man a fish and you feed him for a day;
teach a man to fish and you feed him for a lifetime.

— Maimonides

Congratulations! You are about to embark on one of the most exciting and important aspects to building and growing your business—Field Training! It is often said, you only get one chance to make a first impression, and this is your opportunity!

The Field Training for Success Blueprint[1] offers a suggested step-by-step approach to help you get your New Sales Professional off to the best possible start to their new career.

Sales Academy provided the basic fundamental selling skills of FHL sales success system; the Field Training Week provides an opportunity for you to demonstrate "how" to put those skills into action. A successful Field Training Week will increase the New Sales Professional's confidence, create reassurance that their time spent in Sales Academy was worthwhile, and reaffirm that they made the right decision to join your agency.

Field Training reinforces how important it is to know and apply the basic sales fundamentals on a daily basis, and by doing this, you will help New Sales Professionals to develop and instil effective work habits.

During the course of your week together, both you and your New Sales Professional can discuss and make a game plan of short-, medium- and long-term goals that they are committed to. This week also offers the opportunity to reiterate the commitment and activities that are required to achieve those goals, and to communicate what your plan is to support your News Sales Professional in achieving or exceeding their goals.

Your leadership provides hope, direction and a path to follow for New Sales Professionals to have a rewarding and successful career.

[1] See page *FTS-16*

Your Agency is growing…

Your goal is to bring on board a great team.
To retain this team and to help them grow,
you will need to train and mentor them.

They've put their trust in you.
It is a great responsibility.

Introduction:
Field Training

See ABM, Module 2, p. DEV-15

Field Training

When we shake hands with a New Sales Professional, we are making them a PROMISE—a promise which implies a responsibility, a promise that we will give them the BEST possible chance of success with your agency. It's a promise which includes providing the BEST training available, giving the BEST on-the-job mentoring, and offering the BEST support they will need to succeed.

Sales Academy is a New Sales Professional's inception into the Family Heritage Sales System. Our week-long Sales Academy teaches business and fundamental sales and selling skills. This, along with effective "Field Training," is the first step in developing a New Sales Professional's positive start to their successful new career.

What is Field Training?

Field Training is a proven way to change a person's way of life for the better and to prepare them for success in their new career. In Sales Academy, your New Sales Professional has learned the FHL basic fundamental selling skills and the Cycle of Selling system—now they have an opportunity to see this system in action.

Understandably, most New Sales Professionals are a bit apprehensive at the start, especially if this is their first time in direct sales. Your role as their Trainer is to pair up with them in their very first week and model our sales system exactly as it was taught to them in Sales Academy. By following the **FHL Suggested Field Training "Blueprint,"** *(see page FTS-16)* you will help provide your New Sales Professional the best start possible by developing correct work habits and by applying proven methods of success.

See ABM, Module 2, p. DEV-17

Why Field Train?

Agency Builders / Trainers are encouraged to Field Train each New Sales Professional by applying the suggested Family Heritage Field Training Blueprint so that the New Sales Professional has the best start to their new career.

Agency Builders / Trainers should maintain a moral responsibility to Field Train new and experienced Sales Professionals properly since they were promised this training during their initial interview and during Sales Academy.

See ABM, Module 2, p. DEV-17

What is the Purpose and Benefits of Field Training?

- The teaching and demonstration of Family Heritage's Field Training Success System allows for the duplication and replication of systematic skills within your Agency.
- Helps Trainee to build confidence and conquer fear and timidity.
- Observing the Trainer in the field motivates the Trainee to perform. *"If they can, then I can!"*
- Prepares New Sales Professionals for selling on their own.
- Helps New Sales Professionals reach and exceed their objectives.
- Increases retention of Salesforce.
- Gives Trainer a better understanding of the Trainee's level of knowledge and "know-how."
- Increases New Sales Professional and overall Agency production.
- Gives Trainer an opportunity to "Sharpens the Saw" of field skills and maintain the confidence and ability necessary for modeling our Field Training Success System.

See ABM, Module 2, pp. DEV-9 – DEV-13

Before Field Training Begins

- Review "Post Sales Academy" section in ABM manual for instructions on "Debriefing." *(See outline on page 2-13 of Module Two: Develop and page FTS-9 of this booklet, Field Training for Success.)*
- Set New Sales Professional's expectations for "Training Week" and weeks following.
- Confirm dates / times where you will meet your New Sales Professional to begin their week of Field Training.

Effective Post Sales Academy Debrief Outline		
When		Friday Morning—the day after they return from Sales Academy
Where		Office—or private area in a restaurant, hotel, library, etc.
Who		Agency Owner / Agency Builder / New Sales Professional
Time		60 – 90 minutes*
Step 1 5 min.		***Welcome the New Sales Professional "Home"*** • How was their trip? • How is the family • Relax, small talk
Step 2 5 min.		***How was Sales Academy?*** • Listen for Feedback • Ask about their experience *(pass information up the line if required)*
Step 3 10 min.		***What are Your Goals?*** • Where do you see yourself in next 1–3 months? • 2 years from now? • Determine your personal / family goals? *(Ex: Car, house, vacation)* • Agency Builders and Agency Owners share some goals they have met because of their own FHL experience • Complete their GOAL SHEET—keep on file to review
Step 4 20-30 min.		***Inspect Level of Knowledge*** • Have Sales Professional give NEW CUSTOMER APPROACHES or the three types of approaches • Critique • ***Assign practice homework***
Step 5 10 min.		***Set CLEAR EXPECTATIONS of the New Sales Professional's Work Week*** • Review the Field Training "Blueprint" • Meeting Times and Locations • Field Trained to a "Green Out" $5,000 GAP • Clear the Decks—get a commitment to a full week: M-F: 9am – 9pm • Review the Daily Goal Card and the importance of reporting stats daily. *(# hours worked, contacts, demos, apps, GAP)*
Step 6 5 min.		***Review TERRITORY ASSIGNMENT & Organize Effective Week*** • Ensure ***5+ pre-set appointments for Mon / Tues*** *(Through family, friends, termed clients, business & residential, etc.)* • ***Check sales materials*** to ensure New Sales Professional's book and supplies are stocked and in order for their week ahead.
Step 7 5 min.		***End with Inspiration*** • Tell them you ***BELIEVE*** in them and are enthusiastic to have them on your TEAM • Let them know you are there to help, support and encourage them • Reinforce that you will see them on Monday at [TIME] and [PLACE]

**Times are suggested.*

Your New Sales Professional is eager…

They've attended Sales Academy and are anxious to get their new career started.

Their first week of Field Training is an opportunity for you, the Trainer, to make a commitment and to deliver your promise by providing the best training available and giving them the support they need to succeed.

The Role
of a Field Trainer

The best prepartion for tomorrow is doing your best today..

— H. Jackson Brown Jr.

See ABM Module 2, p. DEV-17

Preparation

It has been said that *"Spectacular achievement is always preceded by unspectacular preparation,"* and that *"Good luck is the residue of preparation."* Your preparedness for Field Training a New Sales Professional from the first day on will set the stage for the rest of the week and, more than likely, for the rest of their career. Always keep in mind that a Trainee will watch what you do more than listen to what you say. Your ability to go out and demonstrate our success system will be observed, scrutinized and modeled after, so you have to be prepared to get it right. The following suggestions are best practices to prepare you for conducting a successful Field Training week:

- Be on time and dressed to impress, as you don't get second chances with first impressions! Be ready to go EVERY DAY.
- Dress appropriately for the season and always prepare for inclement weather.
- Your transportation vehicle is clean and tidy with supplies stocked in full, i.e., sales materials, business supplies, snacks and beverages.
- In 'selling trim' and able to demonstrate all steps of the Cycle of Selling verbatim.
- Demonstrate a positive attitude, especially in the face of adversity.
- Stick to the Blueprint for Success Schedule—no short cuts or excuses.
- Demonstrate how to get in the daily activities necessary for success:
    - ~ Work a minimum of 8+ hours and make 20-25 calls a day.
    - ~ Set up 5 pre-scheduled appointments for Monday and Tuesday.
    - ~ Strive to complete 6+ presentations daily.
    - ~ Make at least 1 sale a day.
    - ~ Strive to earn $200–$300 or more per day in commissions.
- Ask for Referrals at every opportunity.

See ABM Module 2, p. DEV-21

Review Field Training and Evaluation Process

An important part of the Field Trainer's role is the Evaluation Process where the Trainee engages in selling activities while the Trainer observes and takes notes. At the end of each day you can both review the Field Evaluation Form (together) to help the New Sales Professional identify their strengths as well as areas for improvement. The following points are best practices for effective field training and evaluation of New Sales Professionals:

- You will take notes when trainee is selling using the Field Evaluation Form—be as unobtrusive as possible when watching and taking notes.[1]
- Assume nothing! Do not prejudge based on background, or what the New Sales Professional tells you they can / cannot do. Evaluate only what you see and hear personally—not what the they tell you, but what they SHOW you.
- Look for the "Key" issue. Don't be concerned with trivia, or "Will it make / break a sale?"
- Write down all the important things—good or otherwise. Take note of anything worth discussing in between presentations to offer praise or corrective action throughout the day.
- Always demonstrate proper work habits—the New Sales Professional will do 50% of what you do right and 100% of what you do wrong—strive for perfection and don't cut corners.
- Always demonstrate important point's personally. Call it to the New Sales Professional's attention. Over-emphasize!
- Correct only errors repeated more than once, except inadvertent misrepresentation. Correct this immediately.
- Don't interrupt a Sales Professional while they are making a presentation—unless they mislead the prospect due to inexperience. In this case correct immediately.
- Keep track of all Pre-Approach. Pre-Approach is the prospect's name, place of business, and any pertinent information that can be used in establishing immediate credibility at the initial approach. Trainers should keep track of Pre-Approach to model to the Trainee how this should be done correctly and consistently.

[1] A sample Field Evaluation Form can be found on page FTS-23 in back of this book, and can also be downloaded from FHL website.

See ABM Module 2, p. DEV-19

Initial Field Training—1st Week

It is your role as Trainer to prepare your New Sales Professional for their Initial Field Training. The following steps will help to ensure greater integration into their new career with your agency:

1. Inform your New Sales Professional that you are going to do your very best and demonstrate to them the effectiveness achieved by following the Family Heritage Sales System.
2. Reiterate the Field Training Schedule, i.e. Monday the Trainer will do most of the work to demonstrate how to get the week off to a "Fast Start" along with a start time, activity goals, Tuesday the Trainee will participate more, etc.
3. Inform them they will be afforded the opportunity to make more and more Sales Presentations as the week progresses, and that you will be there to render any assistance necessary.
4. Even though your New Sales Professional may have experience in direct sales, they are still new to you and to your agency. Explain to them carefully their role before you both go out into the field. Give them a copy of the Field Evaluation Form and review it with them showing how you will critique their skills using this Cycle of Selling checklist. Ask if they have any questions.

See ABM Module 2, p. DEV-19

Review New Sales Professional "Trainee" Role

Make sure your New Sales Professional knows and understands the following so that you can avoid any awkwardness during a presentation.

- New Sales Professional is to observe the Field Trainer and NOT interrupt.
- Field Trainer will enter home or place of business first and is followed by New Sales Professional.
- New Sales Professional should stand to one side and behind the Field Trainer. This will make them as unobtrusive as possible so the prospect can focus solely on the Trainer.
- Instruct the New Sales Professional to stay close to the Trainer at all times. If presenting in a business, do not to handle any merchandise, etc. If presenting in a home, do not wander about.
- New Sales Professional should mirror Trainer in eye contact and body language, i.e., when Trainer looks up, New Sales Professional looks up, follow pointing, laughs when you laugh, etc.

See ABM Module 2, p. DEV-19

Discussions on Drive to Territory

In the first week, it's best to drive to territory together so that you can continue to discuss the day ahead as well as develop the Trainer/Trainee relationship. In addition to developing that crucial 'Bridge of Trust' with your New Sales Professional on the drive to and from the sales territory you also have an opportunity to discuss what they will see you do during the week of training, such as:

- Demonstrate how to break in and canvass a new territory using local names and testimonies.
- Demonstrate how to develop leads and appointments through Pre-Approach and referral gathering.
- Use the Daily Goal Card throughout the day to keep track of start / stop time, #hours, calls, presentations, applications and GAP.
- Perform the Cycle of Selling steps verbatim to what they learned in Sales Academy.
- Use the responses to objections taught in Sales Academy.
- Lots of cold-calling and presentations daily with the possibility of rejection at every turn.
- Sell in volume, i.e. show multiple policies.
- Demonstrate a positive attitude no matter the circumstances, i.e., negative prospects, poor weather, no sales, etc.
- Have fun and enjoy meeting new people!

Note	You may be tempted to continue preparatory discussions at the office or meeting spot; however this will only set the stage for creating a habit of procrastination, and anything you can discuss at the office can also be discussed in the car on the way to work.

"The success of Field Training is 90/10: 90% is you, the Trainer"

You've gotten off to a great start…

It's lunch time… take this opportunity discuss what went well and help your New Sales Professional relax and address any concerns they may have.

Set them up for a great afternoon—they are looking at you as their mentor for reassurance and guidance. Your confidence in them will help set up their own.

Field Training:
The First Week

The following is an example of a typical Week 1, Day 1 Schedule and is consistent with the rest of the week. Refer to the *Blueprint for Success* for a week-at-glance training schedule.

See ABM Module 2, p. DEV-23

Day One—Use "Blueprint for Success"

Make sure your New Sales Professional knows and understands the following so to manage their expectations and "get with the program" from the very start:

- Get keyed up—it's GO TIME! Show the New Sales Professional the importance of getting "psyched up" to hit the field, *i.e. energetic music, self-talk, reviewing goals, jumping jacks, etc.*
- Trainer to do the selling in the New Sales Professional's territory, making the first call at 9am or earlier.
- New Sales Professional has the opportunity to make some presentations before lunch while Field Trainer observes and takes notes using the Field Evaluation Form (see page *FTS-23)*. **Do not interrupt Sales Professional!**
- Over lunch break discuss positive aspects of morning together.
- Adopt an **"Everything you did was good"** attitude making allowances for nerves etc., and instruct your New Sales Professional specifically *what to write down as you discuss the morning's work.*
- Trainer sells after lunch up to 5pm, allowing for the New Sales Professional to give another presentation or two.
- Field Trainer observes again and takes notes during each presentation.
- Field Trainer / New Sales Professional continue to canvass and prospect B2B / C2C for new business until daily objectives are met.

Suggested FHL Blueprint for Success

New Agent 4-week Quick Start to Success

<table>
<tr><th>Time</th><th colspan="2">Monday</th><th colspan="2">Tuesday</th><th colspan="2">Wednesday</th><th colspan="2">Thursday</th><th>Friday</th></tr>
<tr><td>8:00</td><td colspan="9">Attend Morning Meetings / or Meet with Trainer</td></tr>
<tr><td>9:00</td><td colspan="2" rowspan="2">Trainer Presents / Sells</td><td colspan="2" rowspan="2">Trainer Presents / Sells</td><td colspan="2" rowspan="3">Trainer Presents / Sells</td><td colspan="2">Trainee Presents / Sells</td><td>Trainee Presents / Sells</td></tr>
<tr><td>10:00</td><td colspan="2" rowspan="3">Trainer Presents / Sells</td><td>Trainer Presents / Sells</td></tr>
<tr><td>11:00</td><td rowspan="2">Trainer Presents / Sells 50%</td><td rowspan="2">Trainee Presents / Sells 50%</td><td rowspan="2">Trainer Presents / Sells 50%</td><td rowspan="2">Trainee Presents / Sells 50%</td><td rowspan="2">Trainee Presents / Sells 100%</td></tr>
<tr><td>11:30</td><td colspan="2">Trainee Presents / Sells</td></tr>
<tr><td>12:00 N</td><td colspan="2">Lunch</td><td colspan="2">Lunch</td><td colspan="2">Lunch</td><td colspan="2">Lunch</td><td>Lunch</td></tr>
<tr><td>1:00</td><td colspan="2" rowspan="5">Trainer Presents / Sells</td><td colspan="2" rowspan="5">Trainer Presents / Sells</td><td rowspan="6">Trainer Presents / Sells 50%</td><td rowspan="6">Trainee Presents / Sells 50%</td><td rowspan="6">Trainer Presents / Sells 50%</td><td rowspan="6">Trainee Presents / Sells 50%</td><td rowspan="2">Trainer Presents / Sells 100%</td></tr>
<tr><td>2:00</td></tr>
<tr><td>3:00</td><td rowspan="4">Trainee Presents / Sells 100%</td></tr>
<tr><td>4:00</td></tr>
<tr><td>5:00</td></tr>
<tr><td>5:30</td><td colspan="2">Trainee Presents / Sells</td><td colspan="2">Trainee Presents / Sells</td></tr>
<tr><td></td><td colspan="2">Dinner</td><td colspan="2">Dinner</td><td colspan="2">Dinner</td><td colspan="2">Dinner</td><td>Dinner</td></tr>
<tr><td>6:00</td><td rowspan="5">Trainer Presents / Sells 50%</td><td rowspan="5">Trainee Presents / Sells 50%</td><td rowspan="5">Trainer Presents / Sells 50%</td><td rowspan="5">Trainee Presents / Sells 50%</td><td colspan="2" rowspan="5">Trainer Presents / Sells</td><td colspan="2" rowspan="3">Trainer Presents / Sells</td><td rowspan="5">Trainee Presents 100%</td></tr>
<tr><td>7:00</td></tr>
<tr><td>7:30</td></tr>
<tr><td>8:00</td><td colspan="2" rowspan="2">Trainee Presents / Sells</td></tr>
<tr><td>9:00</td></tr>
</table>

Week:

#2	Monday & Minimum 1-3 Days
#3	Monday & Minimum 1-2 Days
#4	Monday & Minimum 1 Day

New Agent (Trainee) expectations Weeks 1-4—Achieve their "Quick-Start Bonus." Produce a minimum of $10,000 GAP in their first four weeks and complete their required FIT modules.

End of Day Trainer Checklist

At the end of each training day, take the time to reflect on the days activities, performance and results. This is a great moment to assess the good points, the points to improve, and to provide some constructive feedback, coaching, and training tips; but most of all, to offer encouragement, motivation, and inspiration for tomorrow! Following the suggested tips below will enable the trainee to understand how important it is to engage in effective activities to ensure the best possible start to their new career.

- Complete the Daily Goal Card.
- Check for complete live applications.
- Review commissioned earned against objective for the day / week.
- Have an informal "feedback chat" to discuss the day and assess the New Sales Professional attitude.
- Review and practice any specific areas the New Sales Professional needs help in.
- Complete and review the Field Evaluation Form *(see page FTS-23).*

See ABM Module 2, p. DEV-29

End of First Week—New Sales Professional Evaluation

After completing the first week of Field Training of a New Sales Professional, you should always have a Debrief Meeting with him / her to review the week's performance. After analyzing the week's production results, you want to determine—how is their attitude NOW vs. Monday?

- Do they like their new opportunity? . . . . □ Yes . . . . □ No
- Are they enthusiastic about the future? . . . . □ Yes . . . . □ No
- Are they satisfied with the production? . . . . □ Yes . . . . □ No
- Are they satisfied with their income? . . . . □ Yes . . . . □ No
- Do they now have confidence in themselves? . . . . □ Yes . . . . □ No
- Do they now have confidence in the system . . . . □ Yes . . . . □ No
  and in you, the Agency Owner? . . . . □ Yes . . . . □ No
- Have they developed good work habits? . . . . □ Yes . . . . □ No
- Have they shown progress? . . . . □ Yes . . . . □ No

Your positive influence and leadership in their first week should result in positive answers to all these questions. However, should any of these answers be a "No," take the time to address their concerns and discuss corrective measures to turn them around. DO NOT brush off a negative attitude and expect it to turn around without your help! Always address concerns immediately and strive to leave them in a better place before adjourning the meeting.

See ABM Module 2, p. DEV-28

General Notes about the First Week

- If the Sales Professional starts out achieving great results DO NOT assume they can sell independently and cut short their training week. Instead, it is suggested you continue to follow the standard Field Training Blueprint schedule regardless of the start.
- Important: In their first month you should make contact with the New Sales Professional daily, if not in person, then through some other method of communication, e.g., phone, or text message, etc.
- Each day you meet with your New Sales Professional:
  - ~ Always Be Enthusiastic
  - ~ Review the Activities and Results at the end of each day
  - ~ Always use "Constructive" Criticism so to motivate toward improvement
- New Sales Professionals will begin forming habits in the very first week based on the activities you lead and direct them in. Whether or not they are good or bad habits depends on you, the Trainer.
- RESULTS ARE WHAT COUNT. At the end of the day, *the purpose of Field Training is to demonstrate that policies can be written in volume and success is attainable by the use of the Sales System taught in Sales Academy.*

See ABM Module 2, p. DEV-28

Field Training Follow-up Schedule

The first week of Field Training can be the most impactful week for a New Sales Professional in determining the course of their career—which is why it is so important for you, the Trainer, to work with them the entire week to demonstrate proper daily activities for success.

One week, however, may not be enough exposure to our system for them to form the necessary habits to launch a successful career. *It is advised that the Trainer continues to work with the New Sales Professional each week in the first month.* As the New Sales Professional gains more skill, confidence, and independence the amount of time needed in the field with them will lessen.

Here is a suggested Follow Schedule after the first full week of Field Training:

- Week #2 Monday with minimum of 1-3 days
- Week #3 Monday with minimum of 1-2 days
- Week #4 Monday with minimum of 1 day

Each day you shadow the New Sales Professional, be sure to utilize the Field Evaluation Form (see page *FTS-23)* to track their continued progress in understanding and applying each of the Cycle of Selling skills. Collect and keep all Evaluation Forms in the Agent's file for Progress Reviews.

See ABM Module 2, p. DEV-30

Expectations for New Sales Professional Weeks 1 – 4

All new Sales Professionals will have high hopes for success at the onset of their career, and you should encourage them to strive for every goal they aspire to. Understandably, in their initial enthusiasm, some New Sales Professionals may express goals and objectives that are seemingly unrealistic, such as "breaking the company record for weekly premium,'' however as their trainer and mentor, you should always offer enthusiastic support for them to achieve their dreams and ambitions.

In addition to their personal goals and aspirations, there are several objectives that ALL New Sales Professionals should be expected to achieve, and these initial milestones are not only important for the Sales Professional's development and confidence, but also extremely necessary for the proper onboarding and longevity of their career.

To ensure the best possible start to a New Sales Professional's career, it is paramount to outline expectations for their 1st four weeks with your Agency. This provides direction, a path to follow, hope, motivation and a belief from you that anything is possible. With your support, each and every New Sales Professional should strive to achieve the following:

1. Achieve all potential Bonuses. Above all else, getting paid is one of the first objectives of any new Sales Professional. Our New Sales Professional startup bonus incentive is not only realistic for everyone to earn but also a strong boost to their initial cash flow at the start of their career.

2. Produce a minimum of $2,500 GAP per Week in First 4 Weeks.
A 'Builders Week' of $2500 in premium is a minimum personal production standard all Sales Professionals should strive for, and *consistency* is the lifeblood of New Sales Professional retention. It is crucial for your new Sales Professionals to start forming the habits and expectations of submitting business weekly. As their Trainer you should do everything in your power to support this objective not only for the sake of their career but also for their financial stability.

3. Complete necessary FIT Modules. FIT is just one of the many training tools available to new Sales Professionals for their continued educational and personal development. After taking the initial Onboarding course prior to Sales Academy, additional Sales modules should be assigned weekly to ensure a proper understanding and internalization of our sales system.

4. Qualify for FHLA 101 in First Quarter. Career Track can be a substantial motivator for all career-minded Sales Professionals and should be discussed and promoted from the start of the hiring process and throughout their career. Leadership Academy 101 is the perfect opportunity for New Sales Professionals in their first 3-6 months to recharge and re-focus on both the

fundaments of our sales system as well as their chosen career path to Agency Ownership. As an Agency Builder growing a team, your New Sales Professional retention can substantially increase by getting them into FHLA training as soon as possible.

In addition to the aforementioned expectations for New Sales Professionals, your Agency Owner has expectations of YOU, the Sales Trainer, to support the New Sales Professional's Field Training Objectives until they are met.

Just as "Rome wasn't built in a day," seasoned Sales Professionals are not developed after a full week of field training, or even after a full month.

It takes time for anyone in our business to fully embrace and internalize the skills necessary for a successful sales career here at Family Heritage.

Yes, your time with New Sales Professionals in the field will help provide them the knowledge and know-how to work independently on their own, however, they will also continue to face challenges along the way—especially in their first 6 months. The difference between those New Sales Professionals who persevere and those who succumb to the challenges of sales can depend just as much on the follow-up weeks after their initial Field Training as the Field Training week itself.

Rule of Thumb: If a New Sales Professional blanks 2 days in a row, always have them shadow an experienced sales professional at least half a day before returning to the field.

When shadowing Sales Professionals in the field always use the Field Evaluation Form (see page *FTS-23)* to pin point where they need help. Review these areas at the end of the day and assign homework for the New Sales Professional to work on strengthening that skill or technique.

If they fall down—then you help them up. It's that simple.

The success of Field Training is 90/10: 90% is you, the Trainer.

Weeks 1 – 4 Review Meeting

This is an ideal opportunity for an Agency Owner / Agency Builder and the New Sales Professional to review the *"Expectations for New Sales Professionals Weeks 1-4."*

Arrange an appropriate time to review weeks 1 – 4.

Discuss the good points.

Points to improve.

Were all goals achieved?

Assess—where are they now in relation to their expectations?

What Ideas does the New Sales Professional have to positively impact their next four weeks?

What initiatives are in place to support making this happen?

What are the agreed **Next Steps?**

What support can you, the Agency Owner / Agency Builder provide?

Field Evaluation, *completed by Trainer, page 1*

Date	
Trainer	
Trainee	
Agency	

Hours	
Calls	
Demos	
Apps	

	Yes (√)	No (√)	Evaluation	Notes
Pre-Approach				
1.			Is **PRE-APPROACH** pad organized (i.e., symbols, abbreviations, tracking)?	
2.			Does it have “essential” and “helpful” information, i.e., names, times, work, vehicle?	
3.			Is the information being gathered in layers?	
4.			Is there “salt-n-peppered” gratitude being given for helpful information?	
5.			Are **REFERRALS** being gathered from EVERYONE?	
6.			Are memory joggers being used to promote more names (i.e., family, friends, neighbors, church members, co-workers, hairstylist, mechanic, etc.)?	
7.			Is the information being gathered in layers?	
8.			Is the correct information being asked for or recorded?	
Approach				
9.			Is positioning correct (i.e., distance from door, profile, etc.)?	
10.			Are the 1st, 2nd, and 3rd approaches being delivered word for word?	
11.			Using names and pointing out neighbors (showing names list/pre-approach pad)?	
12.			**WIPING FEET** when doing a residential approach and gesturing towards the **PRODUCT MENU PAGE** when doing a business approach?	
13.			Other non-verbals: Waving at something / smiling to show friendliness, tapping watch, etc.	
Introduction				
14.			**BUILDING RAPPORT** (approximately 4-8 minutes).	
15.			Showing genuine interest? Finding common ground?	
16.			Body language relaxed? Using names?	
17.			Sharing local/relatable cancer stories with discretion?	
18.			Asking who they know who has had cancer using memory joggers?	
19.			Asking pertinent questions relating to cancer story to help develop and fill need later?	
20.			Showing empathy and compassion during this portion?	
21.			Transitional phrase into presentation book (“…Nearly everyone I talk with tells me how…”)?	
22.			**BUILDING INTEREST/NEED**	
23.			Spending ample time drawing out indirect costs from prospects on page 3?	
24.			Asking need generating questions: • If you or spouse could not work for 6 mos. to a year, how would that affect your family financially? • Why do you feel that way?	
25.			Sitting back and setting pen down as you ask those questions?	
26.			**BUYING ATMOSPHERE**	
27.			Reading 5-10 names from Names List (“You probably know…”)?	
28.			Getting verbal commitment to getting a YES or NO at the end from Prospect?	

Field Evaluation, *completed by Trainer, page 2*

	Yes (√)	No (√)	Evaluation	Notes
Presenting the Benefits				
29.			Using the "Three Levels of Presenting," (Features, Benefits, and Advantages)?	
30.			Using **3RD PARTY NAMES** effectively?	
31.			Showing how the benefits fill prospect's personal need for the product?	
32.			Using the "Q?" (Example: The Jones liked the policy's "no lifetime limits" and the Smiths said they liked the money being "paid directly to you," of what you have seen so far do you like the best? Why is that important to you?)	
33.			Cover the Limitations and Exclusions?	
34.			Our Commitments?	
35.			Price Build-up?	
The Close				
36.			Transition to the Close?	
37.			Using Names / Names List?	
38.			Using Closing Script word for word?	
39.			Assumptive Close?	
40.			Close and Stay Closed (break eye contact; pen and eyes on address box)?	
41.			Filling out paperwork?	
Responses to Objections				
42.			Body Language?	
43.			Using the script word for word (F…F…F…)?	
44.			How many Responses were used?	
Solidification				
45.			Explains all of the next steps after completion of the sale?	
46.			Leaves behind all relevant materials?	
Referrals / Field Recruits				
47.			Asks for Referrals using the Referral Sheet and for Field Recruits using the Field Recruiting Sheet?	
Miscellaneous				
48.			Use testimonials?	
49.			Eye contact?	
50.			Painting "Mental Pictures"?	
51.			Setting appointments?	
52.			Voice tone?	
53.			Enthusiasm?	
54.			Using pen?	
55.			Pick right place?	
56.			Ask effective questions?	

abm

AGENCY BUILDER MODEL

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