FIELD TRAINING PREPARATION

checklist

IPAD

* Brochures
* IRAs/Claims
* Mobile App activated
* Sales Rabbit app
* Voxer app

TERRITORY

* New Territory worksheet
* Sales Rabbit territory drawn
* Names List: area & businesses
* Know exactly where they’ll be starting
* Explain overview of how to work turf
* Build up their territory and get them excited about it!

B2B

* Business Card Holder
* Preapproach booklet

SCHEDULE

* Schedules cleared—trainer AND trainee
* Meeting time and place communicated
* Agreed daily start time/stop time for the week communicated
* Friday out of SA plan
* Gameplan for how to work FnF (sandwich the day)

MISC

* Goal Card
* Explain metrics and how to track: Call/demo/intro/FP/$GAP
* Stats: make sure they know when and where to report them on website
* Voxer: add them to Tuma Agencies group chat
* Voxer: create a 3-way chat with new agent, field trainer and Kevin
* Sales Rabbit: explain how to use it and resources in it
* Watch their demo out of SA
* Supplies