

Onboarding Workflow

November 2024

A Recruiter Successfully Enters Their Candidate into The Onboarder's pipeline when the following steps have been completed:

1. Confirm that Candidate has PAID for Xcel pre-licensing course
 - a. ACTION: Mark the “**LICENSING COURSE**” field as Xcel
 - b. ACTION: Mark the “**LICENSE TYPE**” that the new hire is studying for — it will either be **HEALTH ONLY** or **LIFE AND HEALTH**
2. Confirm with Candidate an established Sales School class type & **estimated date** (please don't promise a Sales School week to a candidate)
 - a. ACTION: Once you know these, mark as such in their CATS profile
3. Fill out the following necessary CATS fields:
 - a. ACTION: Fill in - **Name / Phone / Email / State Selling In / Pay Plan / iPad / Agency Owner / FHL Recruiter Credit**
4. Next, complete a proper baton pass to fhd.onboarding@gmail.com
5. Once the baton pass is done, filter this person into the Onboarding queue via CATS
 - a. ACTION: Type 'Michelle' in “**ONBOARDING**” field
6. Your agent will then be assigned to an Onboarder and will be updated on CATS
 - a. If you are unsure of who the Onboarder is for your agent, please check CATs or reach out to Michelle Morales

The importance of the baton pass is to properly **EDIFY** the Onboarder & their role with this new recruit. From the hiring process, this new recruit knows you the best at this point in time. Now for onboarding, you want to properly help this recruit feel fully taken care of as they are moved into the next stage of the process.

Please remember to **NOT** place a person in the Onboarder's pipeline until **ALL** steps above are complete

For link to further instruction or reference on any of the steps above:

“CATS Onboarding Tutorial”

(Find these PDF instructions on your Agency websites' “Leadership Resources” page)

Role Reminders *During* Onboarding Process

<u>Onboarder</u>	<u>Recruiter</u>	
Helping through pre-licensing course	Paperwork and processing to FHL appointment	Completing steps above to start the baton pass over to the onboarding process
Preparing to pass the state exam	Check for miscellaneous extra forms that need to be cleared up (court charges, W9)	Share good news stories from field
Becoming licensed with the state	Gathering SOAR numbers, getting mobile access, etc	Conversations about goals and vision for business
Sales Academy prep and logistical details	Send the final Sales School itinerary	Once onboarder has emailed out Sales Conversation — set up Zoom call with agent to help them practice the Sales Conversation <u>Word4Word</u> .
Sales Conversation memorization & accountability	Sales Academy hotel reservations	Conversations about expectations of communication, results, training
CATS updates on <i>appropriate</i> items	CATS updates on <i>appropriate</i> items	CATS updates on <i>appropriate</i> items
Xcel – Study Course details	FHL/AO paperwork	New agent success stories. Eagles & Testimonials
Pre-Licensing requirements per state	Background check requirements	Field Training schedule & expectations
Study tips	Background check extra documentation	Conversations about field training schedule and plan
Study accountability	FHL mobile app access	First month goals/monthly cash bonus
Any/all changes to testing dates, study schedule	SOAR number administration	First quarter goals/quarterly incentives
License application questions	Moving out of onboarding pipeline	Canvassing charts/Importance of tracking, reporting, recording stats
Sales Academy flight		Agency core principles & values
Sales Academy expectations / preparations		Share YOUR Story - If I knew now...
		Spousal support & involvement
		Habits, Skills, Attitude. Overcoming fear & obstacles

BATON PASS SCRIPTS

November 2024

Go ahead and email your new hire baton passes to fhd.onboarding@gmail.com

* 3-Way Email *

Hi (NAME),

Now that your licensing process is underway, I want to introduce you to our Onboarding Team, Michelle & Kim. Their role over the coming weeks is to guide you through the licensing & appointment process. This team is super organized and efficient - they are going to make sure the rest of your hiring process is as smooth as possible.

(NAME), as we discussed on our call, timely communication is critical to your success. If you miss a call or message from your team, please get back to them within 12 hours if possible. There are a lot of moving parts between licensing, training classes, hotel reservations and trainer availability, so we need to make sure everything is in order for you to have the smoothest transition possible. I can't wait to be in business with you!

Have a great day!

From this point on, here is everything the Onboarder completes for each new hire:

Onboarding Process Step-by-Step:

- **Welcome Email / Intro to Onboarding Steps -**
 - Once an onboarder is assigned to the new hire, the onboarder will then email the “FHL Welcome Package” through CATS.
 - This includes: further introduction, state specific license instructions and coaching, onboarding checklist, and link to *The Elevators Podcast* done by Elevated Financial.

- **Scheduling via text/email Welcome Call (1 day after Welcome Email is sent) -**
 - ◆ *Goal of texting candidate:* Making sure that they actually read / received the email before the Welcome Call and to set a time/date in calendar so they will most likely answer.
 - *“(Name), I look forward to connecting with you soon. Please text/email me back after you have read through the FULL onboarding email, and then we can schedule a time to chat on the phone. Thanks!”*
 - Onboarder then schedules a time for a quick 10 minute Welcome Call within the next few days.
 - ***Sometimes the agent will respond to your Welcome Email with available times to connect. If that is the case, then you can skip the text message***

- **Welcome Call (1 or 2 days after Welcome Email is sent) - 7 minute call**
 - ◆ *Goal of call:* official welcome to the onboarding process, they have an exam date or at least a study plan set up, are aware of pre-requirements and we discuss potential SS weeks.

“Hey _____, this is (NAME) with Family Heritage. How are you doing?”

This call will be quick but I just wanted to go ahead and talk through the onboarding email I sent out, as well as come up with a game plan for getting you to our sales school in Minneapolis.

So my role in all of this, is to support you through the licensing process and your initial training until you arrive at sales school.

And really what that means is that from this point forward until you show up at sales school, I will be your new go to person for any questions or updates when it comes to things like state licensing, paperwork and training.

Does that make sense?

Perfect — now go ahead and open up that onboarding email that I sent out to you on ___(date)__. — (Wait for them to open the email)

Great! Now let's go ahead and discuss the two PDFs that were attached. That first PDF is an Onboarding Checklist. This is going to go over everything that HAS to be completed before we can have you in class. So just make sure to either print this off or save it to your computer so you can use it over the next couple of weeks to keep yourself organized.

Now the next PDF titled "Pre-Licensing" shows exactly what is needed to get licensed in your state.

(Talk through the steps on Pre-Licensing PDF).

Do you have any questions about these steps?

Okay great. Now looking at a calendar, what was your goal to get your course done and your exam scheduled? (Give estimated times for Sales School depending on when they think they can be done with licensing)

(Talk through plan for course done and exam passed if they have a specific SS week in mind)

After you pass your state exam, I will go ahead and email over the next steps, which includes instructions on applying for your license and it will also include the Sales Conversation that you will want to memorize before class.

Lastly, do you have an Apple iPad?

Yes - Great!

OR

*No - okay, no worries. We recommend iPads that have 32GB of storage or more. **A requirement is that the iPad must run on iOS 16.0+. ** Any of the newer models are great & it does need to have cell service - please let me know if you have any more questions about that.*

Now after this phone call I am going to go ahead and email over your new hire paperwork. It is a quick 10-20 minute application that you will fill out online. Make sure to get that submitted within the next 24 hours.

Great, so I will continue to check in with you each week, but if you have any questions in the meantime shoot me an email/text..

Any questions?

Have a great day and please don't hesitate to reach out if something comes up. "

- **Onboarder sends off E-onboard/new hire paperwork**
 - Once new hire paperwork is complete, onboarder sends the corresponding pay plan DocHub paperwork for the agency.
 - *(IN BACKGROUND)* - once new hire paperwork is submitted to Agent Licensing, onboarder watches to see if background check clears for appointment or if anything is missing or needed to clear out.

- **Onboarder then emails FAQ packet specific for their Sales School (*after e-onboard paperwork is complete*)**
 - MSP packet
 - Online packet
 - Self Paced packet

- **After both sets of paperwork are completed**
 - And after 3-4 business days (**this time period fluctuates*) after the new agent has submitted their new hire paperwork, the onboarder will receive notifications if there are any issues with the background check OR miscellaneous extra forms that need to be cleared up (court charges, W9, fast cash, marketing agreements, etc).
 - ****IF court charges appear on the background check, Sales School date will need to be re-evaluated****
 - Once agent sends in ALL required documents, 2-3 business days are usually needed to give Licensing & Legal enough time to review and make their decision.

****From this point, it is also based on the new agent and when they get their exam scheduled / SS week**

- **Check on Candidate**
 - Checking study progress, making sure they got their exam and fingerprints (if state requires) scheduled, pre-requirement check in (20 hours, CERT, etc.), verifying iPad status.

- **Pre-Exam / Exam Time / Next Steps**
 - The day before the exam (sometimes 2-3 if before a weekend), Onboarder will send the '[Crush Your Exam](#)' email/video & confirm they have everything they need for the test
 - Once they have passed, Onboarder will send the corresponding *Next Steps email (different emails for MSP B2B or Online Residential)*.
 - This email explains how to apply for their Resident Producer License, has the links to the Core4 / full sales conversation
 - Next Steps Call:
 - Pump them up! Exam is passed!

- Apply for license
- Check on fingerprinting — if needed by state & not already completed
- Verify iPad (iOS 16.0 or higher)
- **MEMORIZE CORE 4 first & then the full Sales Conversation**

- **Booking Flights (if needed)**

- ◆ The rule of thumb is that if an agent has a drive to Sales School that is **7 hours or more**, then they can book a plane ticket and we will reimburse them *up to \$600*.
- We advise any new agent to not book their flights until they have a cleared background check from Agent Licensing and they have passed their state exam / applied for license.
- Once both of those are complete, Onboarder sends Flight Information email from CATs.
 - This will go over the rules and requirements set by AOs for agents booking flights.

- On **Mondays**, the onboarding team will begin preparing the **next week's class** (checking paperwork, gathering SOAR numbers, getting mobile access)

- **Prepare for Sales School**

- Periodically checking in on how memorizing the core 4 is coming along and go over any questions that may have come up since the last discussion
- Email out "**Checking in - Sales Conversation**" template on CATS
 - ◆ This is emailed out to make sure they are working on memorizing the Sales Conversation and there is also a Google Form for the agent to fill out so they can grade themselves on how well they know the Sales Conversation.

- On **Wednesday** before the scheduled Sales School week, onboarding will start to finalize hotel accommodations for those attending the next week's class

- **Thursday** morning before the scheduled Sales School week, onboarding to send the final Sales School itinerary (GOAL: before noon on **Thursday**) to agents. Details include Sales School schedule, hotel & office directions, hotel check in information, dress code, shuttle information, what to bring, etc.

- **Sales School Prep Call** - Thursday or Friday before SS

- **AFTER they've been approved by Onboarder for SS**
- Once the itinerary has been emailed out:
 - Let them know how excited we are to meet them!
 - Make sure they don't have any more questions

- Sales Conversation is being memorized
- iPad is verified (iOS 16 or higher)
- Go over how to be prepared for SS (expectations)

- **Sales School & Final Step**

- Candidate successfully arrives in Sales School and is officially removed from my pipeline & into hands of Sales Trainer.

FAQ's

- At what point does a new hire leave onboarding?
 - ◉ When they successfully arrive in Sales School
 - OR
 - ◉ When they have been uncommunicative for 7 consecutive days or they pull themselves out of pipeline
- What happens if someone is removed from the pipeline & then comes back in?
 - ◉ To be reinstated into the onboarding process, it is important that the candidate speaks to the recruiter first, then notify the Onboarder again before being placed back into the pipeline
- What if the new hire signs up for the wrong course on Xcel Solutions? How do they fix that?
 - ◉ All the new hire needs to do is call Xcel Solutions customer service line and let them know that they accidentally signed up for the wrong course. Make sure the new hire knows EXACTLY what course they need to switch to before calling. They will either want HEALTH ONLY or LIFE AND HEALTH. Xcel Solution's phone number: **866-559-9235**
- What does completing the licensing process look like and when are we confident someone is ready for SS?

ONBOARDER:

- Passed exam 5-7 days before SS date
- Has license application confirmation to you by the next day if possible (except IL)
- Sales Conversation - Onboarder & agent have had conversation about purpose of Core 4 & full Sales Conversation
- iPad - have confirmed they have or know they need it by the start of SS
- Flights booked by Thursday at 12pm CST
- Background check passed by A/L
- DocHub completed
- Hotel - especially Sunday arrivals

****see checklist on next page to understand the things that are needed before we can approve someone for SS.**

Addendum A – Onboarding Checklist

GLOBE LIFE – FAMILY HERITAGE DIVISION *Onboarding Checklist*

Start to Finish – The Road to Arriving to Sales Academy as a Licensed Agent

This checklist below MUST BE COMPLETE for you to attend Sales Academy.

1. ___ **Obtain your Resident Producer’s Insurance License**
 1. Schedule & pass your state exam
 2. Schedule & complete fingerprinting (*if your state requires this; see your pre-licensing PDF that is in the ‘Welcome to Onboarding - FHL’ email*)
 3. Apply for insurance license

2. ___ **Memorize your Sales Conversation** for Day 1 of Sales School (this will be sent to you after you pass your state exam)

3. ___ Have your **iPad ready and compatible** (**Your iPad needs to be data enabled (WIFI+cellular), A requirement is that the iPad runs at iOS 16.0 or above.**)

4. ___ Complete the **FHD new hire paperwork within 24 hours** after it has been sent out (this will come from FHLNoReply@Globe.Life)

5. ___ Complete the **DocHub (Agency) paperwork**

6. ___ Clear your schedule for *the week following sales school* (you’ll discuss your first week of training with your field trainer during Sales Academy)

To be finalized and approved for Sales Academy, have you:

- ___ Received your Sales Academy itinerary?
___ Had your final Sales Academy prep call with your Onboarder?

If both of these are not checked off, you have not been confirmed yet – contact us!