

Onboarding Workflow

September 2020

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
2. Confirm with Candidate an established Sales School class type & estimated date
 - 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 / FHL Recruiter Credit**
4. Next, complete a proper baton pass to Michelle Bailey, using (623) 252-9601 or michelle@ibgfhl.com
 - a. ACTION: 3-way text, 3-way call OR 3-way email (choose one)
5. Once the baton pass is done, filter this person into the Onboarding queue via CATS
 - a. ACTION: Enter 'Michelle' in “**ONBOARDING**” field

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 recruiter, 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 links 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)

Michelle Bailey
Onboarding Specialist
(623) 252-9601
michelle@ibgfhl.com

BATON PASS SCRIPT

3-Way Text (OR amend script for 3-way call)

[Name], meet Michelle. Michelle, meet [Name].

[Name], Michelle is an absolute rockstar who has been great at all parts of our business. She will be partnering with you to develop as much as possible before next week's class. Please keep in mind, Liz Manning will be your go-to for paperwork, details and appointment. Michelle is going to coach you on how to hit the field at full speed.

Staying in consistent communication with her from now until Sales School is a REALLY good idea! Following her lead is THE best thing you can do to get ready for this career. Michelle will be in touch soon to get the two of you started in this next process – onboarding

Let me know if you have any questions. Thanks

3-Way Email

Hi [Name],

Now that your licensing process is under way, I want to introduce you to our Onboarding Specialist, Michelle Bailey. I have included her on this email, and her contact info is below:

Michelle Bailey
(623) 252-9601
michelle@ibgfhl.com

Her role over the coming weeks is to guide you through the licensing & appointment process. While Liz Manning will be the point person for all of your new agent paperwork, and handling your Sales Academy booking and correspondence. Michelle will introduce you to Liz further on as you proceed. As we have discussed throughout the hiring process, timely communication is *critical* to your success, and ultimately to getting you off to a fast start! If you miss a call or message from Michelle or Liz, please get back to them in a timely manner (within 12hrs). 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. Have a great day!

Role Reminders *During* Onboarding Process

<u>Onboarder</u>	<u>Recruiter</u>
Helping through pre-licensing course & preparing for state exam	Completing steps above to start the baton pass over to the onboarding process
Becoming licensed with the state	Share good news stories from field
Paperwork and processing to FHL appointment	Conversations about goals and vision for business
Sales Academy prep and logistical details	Conversations about field training schedule and plan
Finalizing administrative activation of new agent	Conversations about expectations of communication, results, training
CATS updates on appropriate items	CATS updates on appropriate items
Xcel – Study Course details	New agent success stories
Pre-Licensing requirements per state	Field Training schedule & expectations
Study tips	Field Training goals & quick start bonus/plan
Study accountability	First month goals/monthly cash bonus
Any/all changes to testing dates, study schedule	First quarter goals/quarterly incentives
License application questions	Canvassing charts/Importance of tracking, reporting, recording stats
FHL/AO paperwork	Overview Sales Rabbit
Background check requirements	Purpose & importance of Core 4
Background check extra documentation	Spousal support & involvement
Sales Academy hotel reservations	Habits, Skills, Attitude
Sales Academy flight/travel logistics	Overcoming fear & obstacles
Core 4 memorization & accountability	Agency core principles & values
FHL mobile app access	Eagles & Testimonials
SOAR number administration	Share YOUR Story - If I knew now...
FHLconnect access	
Final activation	

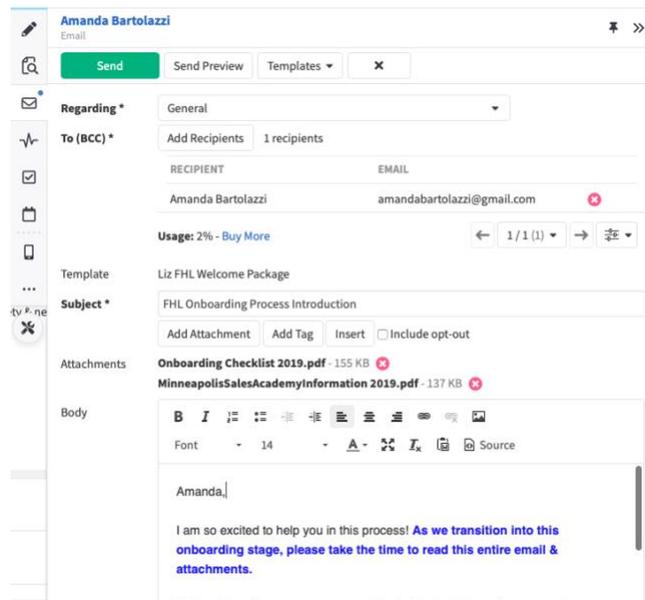
From this point on, here is everything the Onboarder completes for each new hire:

Onboarding Process Step-by-Step:

- **Automated Bomb-Bomb Video Campaign** - Once I see a new candidate in my pipeline, I first find their contact in Bombbomb and enroll them in the “[Liz Auto Onboarding](#)” automation campaign – with video messages done by Travis Wilson
 1. **“Impact – Our Products”** – Sent immediately after onboarding begins
 2. **“Our People”** – Sent 1 day after onboarding, at 10:30 am
 3. **“Impact – Our People”** – Sent 2 days after onboarding, at 1:00 pm
 4. **“Impact – Work Hard, Study Hard, Be Coachable”** – Sent 4 days after onboarding, at 2:00 pm
 5. **“Impact – What You Will Someday Be You Are Now Becoming”** – Sent 7 days after onboarding, at 8:00 am
 6. **“Impact – Our Payoff”** – Sent 11 days after onboarding, at 10:30 am

Welcome Email / Intro To Onboarding Steps

- In the same step, I send them the “Liz FHL Welcome Package” email
 - Link to the [Video](#) in the email



- **BombBomb Email #2 goes out - “Our People”** – Sent 1 day after onboarding began, at 10:30 am
- Welcome Call (1 day after welcome email) - (5 Minute Call)
 - **Goal of Call:** Official welcome to this next stage, understanding of my role, make sure paperwork is started/completed, they have an exam date, a study plan, and are aware of any testing requirements.

“Hey _____, this is Liz Manning with Family Heritage. I just wanted to give you an official welcome call, explain the email I sent you yesterday & explain my role. ___(name)___ it’s my job to support you through the licensing process and your initial training until you arrive at sales school. So, from this point until you arrive here at sales school, I will be your new go-to person. That means any questions regarding, paperwork, studying, getting licensed, sales school – that is what I am here for. You & I will have 3 live phone calls, this being one of them, but since I may not always be available via phone, the best way to get a hold of me is through text or email. Did you get through the first email I sent you yesterday? Cool – is your test scheduled and do you have a study plan set up (talk through)? Ok:

- When can you get that done? - email me that information once it’s done
OR

- Awesome what is that information?

I can see your study progress and will be checking in to make sure studying is on track, so don’t be surprised if you get texts from me complimenting you on your progress! (If their state has pre reqs talk about that) After you pass your test, I will give you a call to go over next steps. If you have questions in the meantime shoot me a text/email!”

- **NEW – after Oct 2018: Cover tablet/iPad for Mobile SS – and make sure their Recruiter has already prepped them for this class requirement**

- Immediately after the call or voicemail, I send them a “Welcome Text” to establish text messaging as my preferred method of communication
 - **Sample Text if they didn’t answer my phone call:** Joseph, I look forward to connecting with you soon. Please reach out via text after you have read my email and followed the steps to complete your paperwork and schedule your test. Thanks – Liz Manning, Family Heritage
 - **Sample Text if they did answer my phone call:** Derek, it was so nice to get to chat with you. Please reach out via text after you have read my email and followed the steps to complete your paperwork and schedule your test. Thanks – Liz Manning, Family Heritage
 - **Sample Text if they already scheduled their test:** Courtney, it was so nice getting to chat with you! Please save this number and reach out via text with any questions. – Liz Manning, Family Heritage
- Make sure to follow up (usually via text) to make sure test is scheduled

****From this point down, it is scenario/timeline driven based on when the person enters into my pipeline & how long we have until their state exam & sales school****

Bombbomb Videos / Checking Study Progress

- **BombBomb Video #3 goes out - "Impact – Our People"** – Sent 2 days after start of onboarding began, at 1:00 pm
- **BombBomb video #4 goes out - Impact – "Work Hard, Study Hard, Be Coachable"** – Sent 4 days after onboarding began, at 2:00 pm
- From the welcome call until the day they take their test, I keep them accountable to their study plan – this is where you'll see my CATS "to-do" column notes such as:
 - "CSP" (check study progress)
 - "Check pre-reqs" / "GTRS" (get test re-scheduled if needed) **AND**
 - Send texts with motivation, congratulations:

Great - that is what I like to hear! And being still a few days until the state exam, I think you are sitting in a great spot. Keep this schedule up and I feel confident that you'll be totally prepared come the 10th

E

Mon 1:35 PM

Burke, nice job yesterday on getting through a few chapters in License Coach. By Monday I'd like to see you at least at 80% completed - you've got this!!

E

Fri 11:43 AM

- Reminding them of testing requirements:

Hey Spencer, just checking in. Looks like you are about 1 hour away from hitting the 20 hour requirement in Exam FX. Have a great weekend studying and reviewing -- be sure you don't take any days off hitting the material - a little bit everyday to keep things fresh

E

Fri 12:05 PM

- Making sure they are on pace to hit the requirements:
 - If they are not on target, having a conversation about rescheduling test

Hi Scott - I was just checking in on the License Coach. I'm glad you're working in it, but I want to suggest getting started on the Accident & Health. The A&H is the side we actually need passed in order to get booked for sales school. There is a LOT of material in it, so let me know if you'll be able to complete it and the prerequisites all by the 14th next week?

E

Fri 12:07 PM

Hey Troy - I see that you did some work over the weekend, but you are not where you need to be. Your final and proctored exams (which you need to finish all course material to be ready for) need to be completed by tomorrow 8/2 in order to test on 8/4. Should we discuss moving your exam date?

E

Aug 1, 10:43 AM

Pre-Exam / Exam Time / Next Steps

- The day before the exam (sometimes 2-3 if before a weekend) I send the '[Crush Your Exam](#)' email/video & confirm they have everything they need for the test
 - The email states to let them know to **text me after they are done with the test**

The screenshot shows an email composition window. At the top, there are buttons for 'Send', 'Send Preview', and 'Templates'. Below these are fields for 'Regarding *' (set to 'General'), 'To (BCC) *' (with 'Add Recipients' and '1 recipients'), and 'Template' (set to 'Liz Crush Your Exam'). The 'Subject *' field contains 'Crush Your Exam'. Below the subject field are buttons for 'Add Attachment', 'Add Tag', 'Insert', and 'Include opt-out'. The 'Body' section contains a rich text editor with the following content: 'Saul, I know your test is soon and I just want to wish you the best of luck! I am so excited to get to be working with you! Shoot me a text as soon as you are done with your test and let me know how it went! Below is a great video from Rich with some tips on how to CRUSH this exam! Good Luck!!! [Watch Crush Your Exam Video](#) Don't forget to shoot me a text after the Exam! Good Luck!'. The rich text editor includes a toolbar with options for bold, italic, text color, background color, link, unlink, list, indent, outdent, link, unlink, font, size, font color, font size, and source.

- **BombBomb Email #5 goes out - "Impact – What You Will Someday Be You Are Now Becoming"** – Sent 7 days after onboarding began, at 8:00 am
- Once they have passed, I send the corresponding Next Steps email (different emails for MSP B2B, Residential or Dallas/Nashville) & schedule Next Steps call for the next day to discuss exactly what is in email

- MSP Traditional / Residential Email - [Link](#)

Send Send Preview Templates ▾

Regarding * General ▾

To (BCC) * Add Recipients 1 recipients

Recipient	Email
TEST TEST	liz@bgfhl.com

1 of 1 (1) ▾

Template Liz - MSP Traditional - Next Steps After Exam Is Passed

Subject * Next Steps After Exam is Passed

Add Attachment Add Tag Insert Include opt-out

Attachments Ordering Business Cards.doc - 32 KB

Body

B I [Icons] Font Size [Icons] Source

Martin,

Congratulations on passing your exam! You are one step closer to getting to Sales School and off to an amazing new career! These are the steps to take after passing your exam.

- 1. Apply for Your State License**
 - Don't be surprised if it doesn't let you apply the day of, it can take 24 hours for states to get test results in the system.
 - However this does need to be taken care of as soon as possible, most states have a waiting period before they grant a license, so if it still doesn't let you apply AFTER 48 hours LET ME KNOW!
 - MAKE SURE TO FORWARD ME YOUR CONFIRMATION OF APPLICATION** otherwise I'll keep bugging you about it.

- MSP B2B Email - [Link](#)

Send Send Preview Templates ▾

Regarding * General ▾

To (BCC) * Add Recipients 1 recipients

Recipient	Email
TEST TEST	liz@bgfhl.com

1 of 1 (1) ▾

Template Liz - MSP B2B Next Steps After Exam Is Passed

Subject * Next Steps After Exam is Passed

Add Attachment Add Tag Insert Include opt-out

Attachments Ordering Business Cards.doc - 32 KB

Body

B I [Icons] Font Size [Icons] Source

Martin,

Congratulations on passing your exam! You are one step closer to getting to Sales School and off to an amazing new career! These are the steps to take after passing your exam.

- 1. Apply for Your State License**
 - Don't be surprised if it doesn't let you apply the day of, it can take 24 hours for states to get test results in the system.
 - However this does need to be taken care of as soon as possible, most states have a waiting period before they grant a license, so if it still doesn't let you apply AFTER 48 hours LET ME KNOW!
 - MAKE SURE TO FORWARD ME YOUR CONFIRMATION OF APPLICATION** otherwise I'll keep bugging you about it.
 - [CLICK HERE](#) for the video tutorial on how to apply!

- DALLAS/NASHVILLE SS Email - [Link](#)

The screenshot shows an email composition window with the following details:

- Buttons:** Send, Send Preview, Templates (dropdown)
- Regarding:** General
- To (BCC):** Add Recipients, 1 recipients
- Recipient/Email:** TEST TEST, liz@lbgfhl.com
- Template:** Liz - DAL/NASH Next Steps After Exam Is Passed
- Subject:** Next Steps After Exam is Passed
- Attachments:** SERIES 6 PRESENTATION GUIDE 2018.pdf - 3 MB, Ordering Business Cards.doc - 32 KB, Dallas:Nashville SS Info.pdf - 481 KB
- Body:** Liz, Congratulations on passing your exam! You are one step closer to getting to Sales School and off to an amazing new career! These are the steps to take after passing your exam.
 - 1. Apply for Your State License**
 - Don't be surprised if it doesn't let you apply the day of, it can take 24 hours for states to get test results in the system.
 - However this does need to be taken care of as soon as possible, most states have a waiting period before they grant a license, so if it still doesn't let you apply AFTER 48 hours LET ME KNOW!
 - MAKE SURE TO FORWARD ME YOUR CONFIRMATION OF APPLICATION** otherwise I'll keep bugging

- Next Steps Call – (1 day after next steps email) (5-8 Minute Call) Congratulations & Licensing Completed
 - Pump them up – exam is passed!
 - Apply for license and get any outstanding paperwork DONE
 - Answer any questions about Sales School – did they READ the SS link?
 - Fingerprinting – if needed by state & not already completed
 - MEMORIZE CORE 4
 - Flight info if needed
 - Set expectations for Sales School
 - Full, dedicated week
 - iPad prepped & ready?
 - Answer any questions
- **BombBomb Email #6 goes out - “Impact – Our Payoff”** – Sent 11 days after onboarding began, at 10:30 am

Sales School Prep

- SS Prep Call – (5-15 Minute Call)
 - Let them know how excited we are to meet them
 - Make sure they don't have any other questions
 - License Confirmation?
 - MAKE SURE PAPERWORK IS DONE – no hotel confirmation until the Onboarder has BOTH FHL e-onboard paperwork & Agency Owner paperwork
 - MAKE SURE CORE 4 IS MEMORIZED
 - Clear the deck for Field Trainer & week following SS

- Final SS email – Sent the Thursday or Friday before sales school (below)

<Name>,

Congratulations and welcome to the **Best Opportunity in America!**

We are excited about your scheduled arrival to attend the **B2B Sales Academy** in Bloomington, MN on **7/29/19**. Sales Academy begins promptly at **12:00 PM**. Give yourself plenty of time (it is recommended you should be present **10-15 minutes early**) to arrive, relax, and be prepared.

Your Sales Instructor for the week will be **Rylie Moore**.

CLASS SCHEDULE:

Monday	12:00 p.m. to 9:00 p.m.
Tuesday	8:00 a.m. to 9:00 p.m.
Wednesday	8:00 a.m. to 9:00 p.m.
Thursday	8:00 a.m. to 4:00 p.m.

CLASS LOCATION:

BLN Office Park
2001 Killebrew Dr
Suite 270 - Family Heritage
Bloomington, MN 55425

HOTEL:

Arrangements have been made for you to stay at the Best Western located across the street from the office. All attendees have a gender appropriate roommate. You are scheduled to check into your room on Monday, July 29 and check out on Thursday August 1.

On your reservation, you may be listed as the main guest or the 'Accompanying' guest, so please provide your confirmation number and have the front desk staff check both names listed on the reservation to ensure proper check in.

Confirmation #xxxxxxx

BEST WESTERN Plus
1901 Killebrew Drive
Bloomington, MN 55425
Phone: [952.854.8200](tel:952.854.8200)

Upon CHECK-IN at the hotel you will be required by the hotel to present a credit card for your incidentals.

MEALS:

The hotel offers a free breakfast. You are responsible for lunch and dinner. Please note, we do have a cafe on site in the training building, and you are also welcome to store meals and snacks in our office kitchen.

MATERIALS:

You will be given a presentation book and supplies during Sales Academy. We practice like we play, so you will need to bring certain sales materials to class each day. Please bring a pen/pencil and a note pad. **Please also bring your iPad for the mobile portion of training as this is a requirement for class attendance.**

DRESS CODE:

The dress code for the week is business casual. Appropriate business casual dress typically includes slacks or khakis, dress shirt or blouse, open-collar or polo shirt, optional tie or seasonal sport coat, a dress or skirt at knee-length or below, a tailored blazer, knit shirt or sweater, and loafers or dress shoes that cover all or most of the foot.

If you have any questions prior to attending, please let us know. We are excited about your arrival and look forward to a week of fast paced, interactive and informative learning. **See you in Sales Academy!**

Sales School & Final Step

- Candidate successfully arrives in Sales School

- Officially removed from my pipeline & into hands of Sales Trainer -

FAQ's

- At what point do they leave onboarding?
 - When they successfully arrive in Sales School
 - OR
 - When they have been uncommunicative for 7 consecutive days and I have reached out via call, text and email
- When removing someone from the Onboarding pipeline, I send the “Final Contact” email, alert the recruiter to unresponsiveness & make the note in CATS

The screenshot shows an email composition window. At the top, there are buttons for 'Send', 'Send Preview', and 'Templates'. Below that, the 'Regarding' dropdown is set to 'General'. The 'To (BCC)' field shows 'Add Recipients' and '1 recipients'. The 'Recipient' field lists 'TEST TEST' and 'liz@ibghl.com'. The 'Template' dropdown is set to 'Liz Final Contact / Life Emergency?'. The 'Subject' field contains 'Liz Emergency?'. Below the subject field are buttons for 'Add Attachment', 'Add Tag', 'Insert', and 'Include opt-out'. The email body text is: 'Jamie, I have tried to contact you several times and haven't heard back. I hope everything is all right. Please contact me if there has been a life emergency so we can adjust accordingly. If you have decided to go in a different direction I understand. I just need to know so we can open up the position. Thanks,'

MISC - Additional Other Paths

- **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 happens if someone needs to get their background checked & approved by Licensing before we officially offer them a position?**
 - Simply email Liz to request e-onboard paperwork (and provide details of the recruit, contact information & proposed pay plan *(since that goes out in the original paperwork)*)
 - Let the recruit know they should fill out that paperwork as soon as they receive it
 - Liz will follow up as soon as there is a decision & if approved, **then officially start at the top of the Baton Pass instructions** & officially move the recruit into the Onboarding pipeline

Addendum A – Sample Baton Passes

August 2019

3-Way Text (OR amend script for 3-way call)

“Liz meet John Maness. John, meet Liz Manning, our onboarding & licensing expert. John is a new agent preparing the licensing exam who Nathan and I are really excited about!

Liz is awesome at making sure people get off on the right foot and is THE expert on getting licensed, appointed & prepared for sales academy. She will also be integral in all of the logistics of registering & booking you for sales academy and preparing to get out into the field.

Staying in consistent communication with her from now until Sales School is a REALLY good idea! Following her lead is THE best thing you can do to get ready for this career. Liz will be in touch soon to get the two of you started in this next process – onboarding!”

3-Way Email

Hi Jake,

Now that your licensing process is under way, I want to introduce you to our Executive Admin and Onboarding Specialist, Liz Manning. I have included her on this email, and her contact info is below:

Elizabeth Manning
(612) 444-5107
liz@ibgfhl.com

Along with managing the Bloomington, MN regional office, Liz brings five years of direct sales experience and insight. Her role over the coming weeks is to guide you through the licensing & appointment process, be the point person for all of your new agent paperwork, and handle your Sales Academy booking and correspondence. Expect to hear from her soon.

As we have discussed throughout the hiring process, timely communication is *critical* to your success, and ultimately to getting you off to a fast start! If you miss a call or message from Liz, please get back to her in a timely manner (within 12hrs). 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.

Have a great day!
<signature>