

**Elite Field Trainers vs Standard/Baseline Field Trainers**

1. **Communicate the Field Training Process and Set Expectations:**
   1. Elite performing field trainers build confidence in new agents by providing clarity before getting started. They keep it simple, stick to the established field training process, paint a picture of what the process is going to look like, set expectations for the week and day, and answer any questions the agent may have before getting started.
   2. Standard field trainers start training without clearly explaining the process and expectations to the new agent. They go about their day like they normally would and answer agent questions as they come up. They will let the agent decide what they want to do vs. leading the new agent based on the established process.
2. **Work a Consistent Schedule:**
   1. Elite performing field trainers lead by example with their schedule and demonstrate the work ethic needed for success. They are early to every meeting and consistently work 8 hours a day, 5 days a week. They have a set start time and set stop time and do not take unscheduled breaks or leave the field for anything other than an actual emergency.
   2. Standard trainers are not unconditionally committed to their schedule. They are often a few minutes late when meeting new agents. Showing agents its okay to make excuses the moment they get in their car. They start and stop around a general time and may end the day early if they achieve their goal for families protected, don’t feel well, or have errands to run.
3. **Keep It Simple and Stick to the Basics:**
   1. Elite field trainers have mastered the fundamentals and execute on the basics consistently. They are disciplined, keep everything simple, and follow the sales conversation word for word. They reinforce what the new agent learned in sales school. Edifying the whole process and building confidence on what they just learned in sales school.
   2. Base field trainers over personalize the sales conversation. They add in language that is not necessary or simply “wing it.” They make excuses as to why they don’t follow the sales conversation consistently and influence new agents to personalize the sales conversation too soon. “I know they say to do it that way, but what I do is”
4. **Develop Habits and Routines that Lead to Top Performance:**
   1. Elite field trainers embody success. They are proactive about training their mind and body. They have a set evening and morning routine designed to optimize their physical health, habits, mindset, and skills. They also join agency training calls, listen to training recordings, and the Elevators Podcast during the day to stay in the right mindset and be a student of the game. They are intentional about developing themselves and show agents how to do the same through their daily actions. (Help them save numbers in their phone for calls, save the stats page on the home screen.)
   2. Standard field trainers talk about growth, but do not consistently act on what they say. They are reactive to their environment and go to the field without priming their mind and body. (Simply show up)
5. **Speak Positively:**
   1. Elite field trainers have an attitude of possibility. They are intentional about speaking positively about themselves, their territory, businesses in the community, prospects, our products, their goals, and their future. Their positivity excites new agents, gives them energy, confidence, and hope.
   2. Base field trainers are not mindful of their attitude and the language they use with new agents. They speak negatively about unpleasant prospects, complain or joke negatively after they get a no, and say certain types of businesses never work for them. They believe they are just being “real” with new agents when they are really demonstrating a low-level attitude and mindset. This often leads new agents to feel nervous and doubtful about their future.
6. **Look and Act Like a Professional Business Owner:**
   1. Top performing field trainers think, act, and look like business owners. They are organized, sharply dressed, and have clean cars. They hold themselves to high standards and understand the importance of how they look and the environment they work in. (Would a business owner want to let you work with their employees)
   2. Less accomplished field trainers do not look sharp. They are unorganized and have messy/dirty cars. They do not think about how their appearance and work environment may affect their results and the new agents following them. (The dust on our dashboard doesn’t bother us, but is really gross for someone’s first time in your car)
7. **Eliminate Distractions:**
   1. Elite performing field trainers demonstrate how to set healthy boundaries and eliminate distractions in the field such as social media and text notifications to maximize their time and energy with prospects. They are focused, and emotionally and physically present when they are in the field. (Properly show how to use voxer, sharing good news, what need they had or objection you had to overcome)
   2. Standard field trainers do not take steps to eliminate distractions and are reactive to texts, phone calls, and social media notifications. They make excuses as to why they must answer calls during the day. (I have to take this…. You only get so much field time with them, guard it and show high sense of urgency)
8. **Clarify and Track Goals:**
   1. Top performing field trainers have a vision for their lives. They set SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound), know WHY they want to achieve their goals, have them written down, talk about them out loud with new agents, and review them daily, weekly, and monthly. They know which bonuses and incentives they are going to achieve, speak positively about the incentive trips they have been on, and get new agents excited to attend the next one. They also use the goal card during the day to keep track of their activities and results. (Explaining why we focus on controllables with goal cards, not sales)
   2. Base field trainers have general goals. They are typically not written down or were written a long time ago. They talk about them if a new agent asks. They do not speak about their goals with complete confidence and certainty because they do not have a clear vision for their lives and are not fully committed to achieving their goals. They have missed several incentive trips and do not know what bonus level they will achieve. They wait to see what happens vs. making it happen.
9. **Work Territory Systematically:**
   1. Elite trainers are organized and have a plan for the day. They know which business they are going to approach first and then work their territory tightly. They go to the next business on the left and on the right and don’t skip businesses based on assumptions and judgements. They always ask for pre-approach before going to the next business, are fast in between businesses, and don’t go five minutes without talking to someone.
   2. Standard field trainers know the first business they want to visit and then drive around looking for other businesses to approach. They speak negatively about certain businesses and skip them because of fear based assumptions. They often drive across town to go to certain businesses they think will be better and spend too much time in their car. Through their behavior, they teach new agents to cherry pick businesses, and cast doubt, overthinking for the new agent.
10. **Consistently Demo the Person in Front of You:**
    1. Elite field trainers ask for the business owner or manager, but they always transition to demoing who they can in the business right then and there. They are also intentional about doing on the spot group enrollments when possible. They act immediately instead of relying on appointments. Knowing you never know if you don’t show them who has a story and is just an ace waiting there. Enrollments come after you demo or protect the person in front of you, not a set up or enrollment junky.
    2. Base field trainers ask for the business owner or manager, and if they are not there, they say they will come back. They do not attempt to demo the person in front of them and tell new agents that they don’t want to upset the business owner by demoing employees without their permission. They rely on scheduling appointments and future group enrollments.
11. **Consistently Follow the Cycle of Selling:**
    1. Elite performing field trainers understand that prospects will not buy if they do not follow the cycle of selling. They maintain control of their emotions and remain cool, calm, and collected no matter what the prospect says. They follow the process no matter what. They may speed up a bit at times, but they never skip steps. This demonstrates how to be process driven and consistent to new agents.
    2. Base field trainers are emotionally reactive to prospects and will jump around in the sales process if they feel like the prospect wants them to hurry up. They demonstrate a lack of discipline, confidence, and consistency to new agents. Letting the prospect dictate the pace and control of demo.
12. **Confident Call to Action:**
    1. Double Elite performing field trainers approach with confidence and lead the prospect by physically going for the sit down. They are always moving the conversation forward by asking questions or giving the prospect options. And showing action being assumptive to sit down and it’s no big deal I will just give you a quick look and whip out the I pad vs waiting for them to answer. I can just show you right here, vs can I show you over here.
    2. Standard field trainers give the approach and then wait for the prospect to lead them. They don’t believe physically going for the sit down works or they feel too embarrassed to do it. They are reactive to the prospect instead of leading the prospect. They give the prospect information and then wait for the prospect to move the conversation forward.
13. **Use Names Effectively:**
    1. Elite field trainers use 3-4 power names, names based on proximity, and/or names based on niche in the approach and throughout the presentation. They make names 3D by giving a story with each name, and they say the prospects name several times throughout the presentation. They also say the names they are going to use in the approach before walking into a business. This shows new agents that being good with names is not just a talent someone has. It is a skill that can be developed through consistent practice and preparation.
    2. Base field trainers use 1-2 names or no names at all. They often struggle to recall the names they want to use when they give the approach and often mix up the names of the business owners at the businesses they have just visited. They do not use the prospects name throughout the presentation because they can’t remember it. They do not practice names before they walk into a business and tell new agents that they are just bad with names. This demonstrates a fixed mindset vs. a growth mindset.
14. **Use 3rd Party Stories and Testimonials:**
    1. Elite field trainers know that prospects believe 100% of what they say, 75% of what other people say and 50% of what they we say, so they are intentional about collecting powerful 3rd party stories and telling 3-4 of them throughout every presentation. They practice saying these stories out loud, so they remember them and deliver them smoothly in their presentation. They also have powerful testimonials saved that cover the most common situations agents come across like successful business owners with money or the common objections agents receive e.g., spousal, need, procrastination, and cost so that they can read testimonials that are specific to the prospect’s situation. This teaches new agents how to prepare like a professional. (When in doubt or losing momentum, always read a claim)
    2. Base field trainers tell stories about themselves, their family, and their friends. They read testimonials that are not specific to the prospect’s situation. This teaches new agents to tell stories that they think of in the moment vs. being prepared to use stories that would resonate most with the prospect. (What I like, or why I got this) The prospect doesn’t’ care about your situation, they care about their own.
15. **Connect the Dots and Tailor the Presentation to the Prospect:**
    1. Double elite field trainers focus on the prospect and what is important to them. They know that people buy on emotion, so they get the prospect talking by asking the questions in the sales conversation, actively listening, and then asking follow-up and second level questions to go deeper and establish an emotional connection between the prospect and the policy. They then use that information to tailor the presentation to the prospect. For example, “You mentioned that your son was in the hospital for 7 days for an accident and had X-Rays done…just an estimate on what we may have paid in that situation is $10k. How helpful would $10k have been when you were going through that with your son? That’s exactly what this is for.” They talk about 60% of the time and hold space for the prospect to talk about 40% of the time because they allow the prospect to sell themselves.
    2. Standard field trainers follow the sales conversation but ask questions like they are checking a box on a checklist. They are ready to move on right after they ask the question. They don’t ask follow-up questions, second level questions, or draw out emotion with the prospect. They are more focused on explaining our product logically and talk about 80% of the time while the prospect talks about 20% of the time.
16. **Make Assumptive Statements vs. Asking Permission:**
    1. Elite field trainers don’t ask for permission to do things. They confidently give the prospect options to move the action forward. For example, How I work with a group like yours is: I get an employee roster to make sure and give each person a chance to put a back up plan in place. What they choose to do is up to them. I am working with Frank’s automotive tomorrow and city hall on Wednesday, but I have Thursday or Friday open which one works better for you. Yes or Yes questions.

Or in the situation of trying to get on a business owner’s calendar they will say, “I usually work on appointments anyways. When would be a good time to get on their calendar? I’ve got some availability tomorrow morning around 10am or later in the afternoon around 2pm. Which would be better for them?” Always reminding them its simple and no big deal.

* 1. Standard field trainers ask for permission by saying things like, “Can I speak to your employees?” and “Would you allow me to come in during your meeting?” and “Can I get on his/her calendar?” When booking a group enrollment, they will often ask the business owner/manager what they want it to look like vs. taking the lead and giving them the choice of two positives based on what it should look like.

1. **Constantly Create a Buying Atmosphere:**
   1. Elite field trainers know that prospects love to buy, but hate to be sold so they are always creating a buying atmosphere starting with the statement “I don’t know if or when we can help you…” They genuinely take the pressure off themselves and have no attachment to whether the prospect buys. They mean it when they tell the prospect in the buying atmosphere that it is okay for them to say no. They are also okay with walking away if the prospect cannot commit to making a decision that day, and they do so in a positive, kind, and professional manner. This teaches new agents to have an abundance mentality and to spend time with buyers. Guarding your time if someone is not with you or it’s not a buying situation.
   2. Standard field trainers put pressure on themselves. They say the words in the sales conversation, but their focus is on trying to get the prospect to say yes. Their words and energy do not align, and they end up putting more pressure on the prospect. They often get frustrated at the prospect when they say they can’t make a decision today and often leave abruptly because they are angry at the prospect. They then judge and make fun of the prospect afterwards with the new agent. This teaches new agents a lack mentality and to focus on what they can’t control.
2. **Close Confidently and Assumptively:**
   1. Elite field trainers follow the close word-for-word and put and keep their head down when asking for the prospect’s address. They close this way no matter what the prospect said earlier in the conversation. They keep it simple and trust the process. They know that their confidence will feed the prospect’s confidence.
   2. Base field trainers fear that being assumptive means being pushy, so they do not follow the close word-for-word. They get nervous when asking for the prospect’s information and often create awkward moments because they start getting wordy and confuse the prospect. Their nervousness makes the prospect feel nervous, which leads to hesitation and procrastination.
3. **Follow the Objection Response System:**
   1. Elite field trainers follow the objection response system and read powerful testimonials that are specific to the objection the prospect gave. They feel that it is their moral and ethical duty to respond to objections to the best of their ability because they are completely bought in on what our policies can do for families and they know that an accident, cancer diagnosis, or heart attack and stroke can happen at any moment. Their focus is on serving prospects so they can make the best decision for themselves and their families. They also know that agents get 2-3 objections on average, so they are fully prepared to address them.
   2. Standard field trainers are either too scared to respond to objections because they think they will be perceived as being pushy, or they get frustrated and start trying to convince the prospect to buy. Either way, they are focused on themselves vs. focusing on what best serves the prospect. They acknowledge the prospects objection and say it back to them nodding their head yes, “you want to think about it” they say and look like a deer in headlights, vs acting like its not big deal and everyone feels this way until they found what it would mean for their family and read a claim, do a rebuttal and ASSUMPTIVELY go right back to the app, not waiting for them to say “yes sign me up”
4. **Consistently Ask for Referrals:**
   1. Elite field trainers are always looking to increase their warm market through referrals and confidently and assertively ask every person they speak with for referrals. They say things like “Who are 3-4 really cool people/business owners I should go see” or “Who are the 3-4 people closest to you who would really benefit from hearing about something like this?” They also keep their eyes open for talented and sharp individuals in the field and approach them about the career opportunity.
   2. Base field trainers are not consistent with asking for referrals or they only ask for referrals when the prospect bought a policy. They are also not intentional about looking for talented and sharp professionals who may be a great fit, or they send out the Career Overview link to every single person they talk to scaring off the new agent they joined an MLM
5. **Track Activity and Notes in MSA/salesrabbit:**
   1. Elite field trainers are organized and have a business owner mindset. They consistently keep track of businesses they have approached and are working with in MSA. They take notes, add employees, add referrals, and add follow up appointments in MSA so they can easily reference the information in the future and develop a sound re-servicing strategy. Talk to text is a game changer and they use it consistently
   2. Less accomplished field trainers are not consistent with entering business information and important notes into MSA. They either don’t do it or write it on paper that they may lose. Tell themselves they will remember or put it in at the end of day.
6. **Direct the New Agent:**
   1. Elite field trainers are intentional about leading new agents. They will introduce the new agent to the prospect in the approach and then tell them in a polite and respectful manner where to sit or stand when they start a presentation. They are in control of the situation and take the guess work out of it for new agents, which eliminates any nervousness or anxiety for the new agent and prospect.
   2. Standard field trainers will pretend the new agent is not there and will leave the new agent figure out where to sit. This can lead to seating arrangements that are not ideal and leave the agent feeling nervous or anxious, and prospect looking at them a lot of the time.
7. **Solidify the Sale:** 
   1. Elite field trainers are intentional about providing quality service to their prospects starting as soon as they get protected. They know that taking a few extra moments to really solidify the sale will lower future cancellations, help them maintain a high A/T ratio, and get more referrals. They always add the prospect to the families for protection list right then and there and ask them to select a reason why they got protected. They then leave a physical brochure for the policies they purchased and make sure the prospect saves their number/contact card in their phone before they leave.
   2. Standard field trainers are only focused on new sales and will leave their new clients with a business card and tell them to reach out to them if they have any questions or need any help. (Never leaving something physical. They don’t understand we sell an intangible product so clients need something tangible to feel like they purchased something.)
8. **Empower New Agents Through Coaching:**
   1. Elite field trainers coach new agents by asking open-ended, empowering questions throughout the day and at the end of training that lead to further learning. They also focus on what the new agent did well, encourage them, and help them get better at one thing at a time. New agents leave the trainer feeling energized, hopeful, and ready to put in the work to improve because they believe it is possible. Some example coaching questions are:
      1. What did you see me do?
      2. What are a few key takeaways from watching me do that presentation/respond to objections etc.
      3. How will you implement what you learned today moving forward?
      4. What do you think you did well today?
      5. What’s the biggest thing you think you can improve?
      6. What steps will you take to improve in this area?
      7. How will you hold yourself accountable?
      8. What’s your very next step to work on this? What time will you do that? Where will you do that?
      9. How can I support you on this?
   2. Standard field trainers don’t ask questions, they just give feedback. They may give positive and constructive feedback, but they may give too many things for the new agent to work on. There is no clarity on next steps and no discussion about accountability. The new agent leaves the trainer feeling drained thinking they have a lot to work on to get better.