

Source Candidate Resumes

- TMKOnline (RMS)
- Run Paid Ads

Tips to Write Your Own Ad Copy

- 1. Start a template** - Open a new document and type out the headings: *Title, Role Overview, Responsibilities, Qualifications, and Details.*
- 2. Search job sites** - Browse websites like Indeed, LinkedIn, Glassdoor, and Monster to find similar openings.
- 3. Collect snippets** - As you read the postings, copy useful details and paste them into your document.
- 4. Refine the draft** - Edit the snippets to align with the role at your organization. Organize into a logical order.

When you post and promote a job description, you're using it to fulfill a recruitment marketing objective: *convert qualified job seekers into applicants*. The document should be rewritten for its target audience and the action you want them to take.

Often, recruiters don't take the time to adjust their ads to the target audience; that's a shortsighted mistake. It fails to recognize the connection between talent acquisition and marketing. Your opening competes with all the others ones out there. And your job description competes for attention among the limited number of qualified candidates. It is worth taking the time to write, and then re-write, a great job ad.

- Headhunt/Scrub Resumes

- Using Keyword Searches to find high quality candidates through any online job source.
- Use specific keyword combinations that align with what you are looking for. For example, if you are looking for a candidate with leadership in their background and you only search "Leadership" you are going to get a wide variety of resumes; if you search "leadership experience" or "experience in leadership" you will get a more specific result.

Screening Interview

Why?

- The purpose of the screening interview is to determine if your candidate is someone you might be interested in while also building their interest in the position.

Simple rebuttals for during the Screening Call

Q: Are there any costs associated with starting this career?

A: Great question; Yes, there is an initial license required by the state and we use a mobile prospecting/application platform, so you'll want an iPad for that.

Q: Where do leads come from? / Q: What kind of CRM do you have? (that type of question)

A: Great question; we use a mobile prospecting/application platform called sales rabbit which runs right on your iPad.

- Sample Screening Sheet to fill in as they talk (download [HERE](#))

Screening Interview		IV Date/Time: _____
		Source: _____
		Phone: _____
		Email: _____
What's Missing Currently?		Notes: <div style="border: 1px solid black; height: 40px; width: 100%;"></div>
What are you looking for in a new career?		
What appealed to you about our ad?	<input type="checkbox"/> Mass Apply/Getting Feelers Out	
After the Career Spotlight		
What stood out from the Career Spotlight?	Save this part for the Follow Up Call	
Really good at professionally?		
What appeals to you about sales?		
What gives you confidence?		

Send Webinar/Applicant Assessment

- Email Outline: include the following:

- A brief thank you for talking with you
 - An explanation of the purpose of the webinar
 - The webinar/link to webinar
 - An explanation of next steps (for us this is an applicant assessment)
 - The link to next steps if applicable
 - Another brief thank you or that you are excited to hear from them
-
- Ask your leader for the link to your Webinar

- Example Applicant Assessment

* First Name:

* Last Name:

* Mobile Phone:

* Email:

* Address:

* City:

* State:

* Zip Code:

Upload Resume: No file chosen or [Paste Contents](#)

Best Time To Call:

Follow-Up Screening Interview (After an Applicant Assessment/Application is returned)

- Fill out bottom half of Screening Sheet

After the Career Spotlight	
What stood out from the Career Spotlight?	
Really good at professionally?	
What appeals to you about sales?	
What gives you confidence?	

- Set Interview & Send Confirmation
- Confirmation Email

Interview Confirmation

Recipients

Interview Confirmation

Kenji,

It was great talking to you for a few minutes. Go ahead and review the information that is attached in order to continue to evaluate whether this is the right fit. It should answer some questions you might have, continue to show you what we do and why, and will allow you discover what other questions you need to get answered.

I have included:

- Compensation Overview** - outlining basics of how you get paid
- What We Do** - Detailed look at the need for our products and the benefits they provide to our clients

Be sure to compile a list of questions you come up with as well and have that with you for the interview. Our conversation will be a video conference via Zoom.

Here is the link:
<https://zoom.us/j/515836106>

Please make sure that you try the link above before the start of your interview to confirm that the technology and your webcam are set up on your end. Sometimes you may need to make some adjustments but they are usually pretty straightforward.

The interview we have scheduled will be a chance for you to showcase what you could bring to our team if we offer you a position. Please take some time to think through what we are looking for in a candidate, and develop some compelling reasons that we should continue the interview process.

I look forward to learning more about you and what you could potentially bring to our agency.

Rylie Moore - Recruiting Staff Development
Infinity Business Group
in partnership with Family Heritage

- Attach Product Packet and Compensation Packet
- See your Agency Owner or Team Leader for your agency specific Comp Packet

2nd Interview

_____ - Outline Sheet (download from your Agency's website – Leadership Resources)

2nd Interview

Name: _____

Do you have any pressing questions before we begin? Tell me more about (*pick topic from Screen IV*)

1. **As you have seen from the career overview, finding the right FIT is one of the biggest priorities for us and for you. Based on what you know so far, why do you feel like this might be a FIT?**

2. **Believing in what you do matters; how do you feel about our product?**

- The need for our plans, 3 different products, how our coverage works.*
 2 markets: B2B ~ Traditional

3. **(Sustainable Business - from script) How do you feel about walking in to a business or knocking on a door without a pre-set appointment?**

4. **Understanding that this is an ownership position, you set your own schedule; how many hours do you see yourself working here? We have suggested schedules that we know work (share B2B or Traditional market hours here)**

- 4/6 Gravies minimum*
 Travel & Trainmores – 1st 3 mos. Are the most critical

5. **Have you ever been paid based on your performance before? How do you feel about commission? How does (spouse) feel?**

6. **Monthly Income requirements - Maintain Lifestyle: _____ Bare Minimum: _____**

- What about our compensation you would like to understand better?*
 What gives you confidence you can handle 80% rejection when you get started?

7. **Is it important for you to be in a leadership position? Why? Why would you be an effective leader?**

- Leadership vs. Mgmt, / only promote organically / We are GROWING!!*

8. **Tell me about other careers you're interviewing for right now? What is your timeframe to start?**

9. **How interested in this career are you?**

1 2 3 4 5 6 7 8 9 10

- Why?*

10. **What do you believe differentiates you from other candidates we have in the interview process?**

11. **Do you currently own an iPad? If not, could you obtain one before the start of Sales School? (*requirement*)**

Key Notes & Score: Personality: 1 2 3 Experience: 1 2 3 Situation 1 2 3 X-factor: 0 1 TOTAL _____

When Appropriate: Additional Steps

- Phone Assignment

-Sample Email

Email x

To [James "Harold" Gentry](#)
Date
Subject **Family Heritage - Phone Assignment**

Harold,

I am glad we've been able to connect and get to this point in the interview process. I know that I am impressed with you so far and potentially what you could bring to our organization.

I put together this list of numbers so that you can talk with some of our other agents. Please call them as soon as you're able as you'll be discussing what you take away from this when we speak next. Take this opportunity to ask questions and interview our team. It is your chance to put the spotlight on us and scrutinize our organization. Some good questions to start with would be:

1. What do you enjoy most about working with Family Heritage?
2. What do you like the least about it?
3. What was your biggest challenge when you got started? How did you overcome that?
4. How long have you been with the company? What is your biggest challenge now?
5. How can I get off to a strong start?

Please feel free to ask your own questions; ones that specifically address any concerns you have as well as your individual situation are always the best. You don't have to ask all (or any) of the questions listed here. These are just a starting point. The purpose of this exercise is to give you a more complete and in depth understanding of our business from multiple perspectives, so please feel free to ask *anything* you'd like. This is an important part of the interview process, so take the time to ask follow-up questions and take notes on what each person shares with you. Some of these agents may have a few questions for you also.

If you don't reach them directly, leave a message. This is a common step in our interview process, so you won't be catching anyone by surprise. I have already let each of them know to expect your call. Just let them know you're an interview candidate and Nate asked you to call them. You can feel free to call as late as 9:00 pm- sometimes that's a great time to catch this crew.

Team Leaders
Alyson Smith
Chuck Smith
***Chuck and Alyson are married and lead together so if you only get ahold of one, that's okay!

Infinity Business Group Agents *From different parts of the US, not just Nebraska
Chris Gambell
Jonathan Powell
Jeremiah Prigge

If you have questions or difficulty reaching anyone, let me know. Otherwise, drive safe!

I look forward to hearing from you once you've made it to Omaha.

Rylie Moore
Infinity Business Group
in partnership with Family Heritage

- Meet with Team Leader

- Let candidate know that TL will reach out to them to set up

- Connect with TL and get the candidate's contact info sent over to the TL

- Shadow Day (Same as above plus sending email; email is under "Schedule Day" in CATs templates)

Subject **Shadow Day**

%FIRST_NAME%,

I am excited for you to get out in the field with one of our agents. A shadow day is a great opportunity to see exactly what our agents do in the field and get a feeling for whether it is something you could see yourself doing. Here are some basic guidelines and expectations for that day

- The agent will connect with you to confirm the exact time and location that you will meet. Here is their contact information (xxx) xxx-xxxx
- Dress code - nice casual; nice jeans or pants and a simple dress shirt/blouse or polo.
- You are there to observe the agent - when interacting with clients, focus on the agent, take notes and save your questions for BETWEEN client interactions
- Ask questions - when you are in between clients, please do ask questions about what you saw and especially about the agents experience in this business
- Focus on the activities - Odds are you might not see a family getting protected in the few hours you are in the field. However, what you see being done will produce the numbers we talk about in the interview process when done with consistency through a week.
- Have fun - We definitely do an important thing but we don't necessarily take ourselves too seriously. A smile and positive attitude makes any day in the field more fun AND more successfully as well.

If you have any questions or problems connecting let me know ASAP. Also, give me a call when you can after your shadow day so we can discuss the next step in the interview process.

All the best,

Final Interview

- Download the script [HERE](#)
 - Topics Covered are the 5 major pitfalls in this business
 - Money Focus, Lack of Support at Home, Schedule, No Buy In, & Lack of Commitment
- Download the outline sheet [HERE](#)

FINAL IV

NAME:

1. Money Focus
 - a. Bare min # from 2nd IV / Cushion?

2. LACK OF SUPPORT
 - a. Tell me about your conversations with ____:

 - b. How comfortable are they with the schedule & commission?

3. SCHEDULE
 - a. Ability to manage yourself and your time in the midst of distractions?

 - b. Sacrifices in the first 3 months?

4. NO BUY IN
 - a. Why do you think you can buy into our processes, even when it doesn't make sense or you don't understand it?

 - b. Last time you were asked to do something outside your comfort zone?

5. LACK OF COMMITMENT
 - a. Biggest challenge you've overcome?

 - b. What will keep you going?

Which of those 5 will challenge you the most? ____ How do you plan to work through that?

How do you think you would do at this? Why?

Send Licensing Info

- What goes into an email received by someone who has accepted an offer?
 - A congratulations and welcome to the team. Make sure they know you're excited
 - An outline of the licensing process with links to courses/materials as appropriate
 - For example: we include a licensing course option, how to schedule a test, how to apply for a license, and fingerprinting information if applicable for your state
 - A reminder for your scheduled phone call the next day (where you'll cover a schedule)
 - Another congratulations!

- They pay for their licensing class and send a confirmation before the schedule call

Scheduling Call

- What goes in to a schedule call?
- Expectations; we're on the same team, our goal is to help you transition well. That requires timely communication from both of us.
- How to study; give them the tips that you have to help it move quickly
- An introduction to whoever will be doing their onboarding/helping them through the licensing process
- An exact schedule of when to have fingerprinting scheduled, day to have their official offer paperwork (E-Onboard) completed by, final exam/proctored exam taken, state exam, last day at their current job, first day of sales academy, first day in the field, first full week, first trainmore, etc.
- Follow up with an email outlining the dates that you just discussed.