



TRANSPARENT  
— FINANCIAL —

## New Agent 4 Week Training

### PRE FIELD TRAINING

#### Friday before Field Training

##### -[New Agent Google Drive](#)

- Go over each video and document in folder
- Call Field trainer to discuss how sales Training went

#### Saturday before Field Training -

- Download and Print off all training materials.
  - [Follow Sheets](#) (3)
  - [Back to basics](#) (5)
  - [Nightly Routine](#) (20)
  - [Goal Cards](#) (5)
  - [Continual Education feedback](#) page (20)
  - [Weekly Reflections](#) (4)
  - [Working Different Industries Worksheet](#) (1)
- Listen to Day 1 Audio [What you need to know when you're new](#)
- Fill out continual education feedback page (Send to trainer)

#### Sunday Before field training

##### - [Approaches](#)

- Listen to audio
- Read over material
- Role play 3 times
- Write out once (send picture of writing to trainer)

### WEEK 1

#### Monday

- Listen to morning call @8am together at first business. - (848) 222-2470
- Listen to Day 2 Audio [Critical Success Factors](#)

-Fill out Continual education Feedback page (Send Picture to Trainer)

-Indirect cost

-Listen to Audio

-Read over material

-Role play 3 times

-Write out once (send picture of writing to trainer)

-Enter Daily Stats on [Legacy Stat Site](#) after last business

-Discuss with Trainer after work.

-What went well?

-What went bad?

-1 Surprise of the day?

**Tuesday**

-Listen to morning call @ 8am together at first business (List phone number)

-Listen to Day 3 Audio [Phases of your Career & Long term thinking](#)

-Fill out Continual education feedback page (Send to trainer)

-Buying Atmosphere

-Listen

-Read over material

-Role play 3 times

Write out 1 time (send to field trainer)

-Enter Daily Stats on [Legacy Stat Site](#) after last business

-Discuss with Trainer after work.

-What went well?

-What went bad?

-1 Surprise of the day?

**Wednesday**

-Listen to morning call @ 8am together at first business (List phone number)

-Listen to Day 4 Audio [Rapport & Connecting](#)

Fill out continual education Feedback page (Send to trainer)

-Benefits / Price build up

-Listen

-Read over Material

-Role Play 3 times

-Write out 1 time (Send to trainer)

-Enter Daily Stats on [Legacy Stat Site](#) after last business

-Discuss with Trainer after work.

-What went well?

- What went bad?
- 1 Surprise of the day?

### **Thursday**

- Listen to morning call @ 8am
- Listen to Day 5 Audio [Getting Started & RYBLAB](#)
  - Fill out continual Education Feedback Page (Send to trainer)
- [Transition to close](#)
  - Listen
  - Read over Material
  - Role Play 3 Times
  - Write out 1 time (Send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

### **Friday**

- Listen to morning call @ 7:30am (Be ready to answer questions)
- Listen to [Abundance Mentality](#) podcast
  - Fill out Continual education feedback page (send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

### **Friday - Sunday**

- Listen to [Gold Standard 2.0](#)
  - Fill out continual Education Feedback Page (Send to trainer)
- Back to basic filled out
  - Pick 2 areas to work on for the week
- Daily goal cards
- Nightly goal sheet (Daily training tool)
- Listen to [Working Different Industries B2B](#)
  - Restaurants & Bars
  - Police
  - Medical-Dental-Vets
    - Fill out Worksheet

- Fill out Weekly reflections
  - send to trainer
- Plan Start / Stop time on stats site for the next week.

## **WEEK 2**

### **Monday**

- Listen to morning Call @ 8am - (848) 222-2470
- Listen to Day 6 Audio [Using Questions in the Intro](#)
  - Fill out Continual Education Feedback Page
- Listen to [Working Different Industries B2B](#)
  - Manufacturing
  - Insurance Agents & Financial Planning
  - Hotels
    - Fill out Worksheet
- [Approaches](#)
  - Listen to audio
  - Read over Material
  - Role Play 3 times
  - Write out 1 time (Send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

### **Tuesday**

- Listen to morning Call @ 8am
- Listen to Day 7 Audio [Price Build up, Transition & Closing](#)
  - Fill out continual education feedback page (send to trainer)
- Listen to [Working Different Industries B2B](#)
  - Hair, Massage, Tattoo
  - Firestations
  - Food Chains
    - Fill out worksheet
- [Indirect Cost](#)
  - Listen to audio
  - Read over Material
  - Role Play 3 Times
  - Write out 1 time (Send to trainer)

- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

### **Wednesday**

- Listen to morning call @ 8am
- Listen to Day 8 Audio [Qualifying Callbacks & Setting Appointments](#)
  - Fill out continual education feedback page (Send to trainer)
- Listen to [Working different industries B2B](#)
  - Farmers
  - Contractors
  - Churches
  - Fill out worksheet
- [Buying Atmosphere](#)
  - Listen to Audio
  - Read over Material
  - Role play 3 times
  - Write out 1 time (Send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

### **Thursday**

- Listen to morning call @ 8am
- Listen to Day 9 Audio [Intro Part I](#)
  - Fill out continual education feedback page (send to trainer)
- Listen to [Working different Industries B2B](#)
  - Chain retail Businesses
  - Car Dealerships
  - Banks
  - Fill out worksheet
- [Transition to close](#)
  - Listen to Audio
  - Read over Material
  - Role Play 3 Times
  - Write out 1 Time (Send to trainer)

- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

## Friday

- Listen to morning call @ 7:30am
- Listen to Day 10 Audio [Intro Part II](#)
  - Fill out continual education feedback page (Send to trainer)
- Listen to [Working different industries B2B](#)
  - Auto Repair
  - Assisted Living
    - Fill out worksheet (Send full doc to trainer)
- [Rebuttals](#)
  - Listen
  - Read over Material
  - Role Play 3 Times
  - Write out 1 Time (send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

## Saturday - Sunday

- Listen to Day 11 Audio [Buying Atmosphere](#)
  - Fill out continual education feedback page (send to trainer)
- [Solidify the sale](#) Audio
- Weekly reflections
- Listen to [Gold standard 2.0](#)
- Back to Basics filled out
  - pick 2 areas to work on this week
- Daily Goal cards
- Nightly Goal sheet (Daily training tool)
- Weekly reflections
  - send to trainer
- Plan Start / Stop time for next week on stat site

## **Week 3**

### **Monday**

- Listen to morning Call @ 8am - (848) 222-2470
- [Approaches](#)
  - Listen to audio
  - Read over Material
  - Role Play 3 times
  - Write out 1 time (Send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

### **Tuesday**

- Listen to morning Call @ 8am
- [Indirect Cost](#)
  - Listen to audio
  - Read over Material
  - Role Play 3 Times
  - Write out 1 time (Send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business

### **Wednesday**

- Listen to morning call @ 8am
- [Buying Atmosphere](#)
  - Listen to Audio
  - Read over Material
  - Role play 3 times
  - Write out 1 time (Send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

### **Thursday**

- Listen to morning call @ 8am

-Transition to close

- Listen to Audio
- Read over Material
- Role Play 3 Times
- Write out 1 Time (Send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business

**Friday**

- Listen to morning call @ 7:30am
- Rebuttals
  - Listen
  - Read over Material
  - Role Play 3 Times
  - Write out 1 Time (send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

**Saturday - Sunday**

- Weekly reflections
  - send to trainer
- Listen to [Gold standard 2.0](#)
- Back to Basics filled out
  - pick 2 areas to work on this week
- Daily Goal cards ready
- Nightly Goal sheet (Daily training tool)
- Plan Start / Stop time for next week on stat site

**Week 4**

**Monday**

- Listen to morning Call @ 8am - (848) 222-2470
- Approaches
  - Listen to audio
  - Read over Material
  - Role Play 3 times
  - Write out 1 time (Send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business



- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

## **Tuesday**

- Listen to morning Call @ 8am
- [Indirect Cost](#)
  - Listen to audio
  - Read over Material
  - Role Play 3 Times
  - Write out 1 time (Send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business

## **Wednesday**

- Listen to morning call @ 8am
- [Buying Atmosphere](#)
  - Listen to Audio
  - Read over Material
  - Role play 3 times
  - Write out 1 time (Send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

## **Thursday**

- Listen to morning call @ 8am
- [Transition to close](#)
  - Listen to Audio
  - Read over Material
  - Role Play 3 Times
  - Write out 1 Time (Send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business

## **Friday**

- Listen to morning call @ 7:30am
- [Rebuttals](#)
  - Listen

- Read over Material
- Role Play 3 Times
- Write out 1 Time (send to trainer)
- Enter Daily Stats on [Legacy Stat Site](#) after last business
- Call Trainer after work to discuss day
  - What went well?
  - What went bad?
  - 1 Surprise of the day?

### **Saturday - Sunday**

- Weekly reflections
- Listen to [Gold standard 2.0](#)
- Back to Basics filled out
  - pick 2 areas to work on this week
- Daily Goal cards
- Nightly Goal sheet (Daily training tool)
- Plan Start / Stop time for next week on stat site

### **[Elevators podcast Audios](#)**