



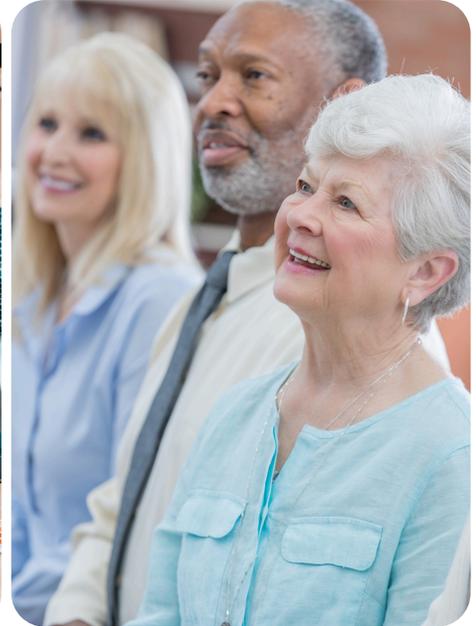
PennGlobal

AN INTEGRITY  COMPANY

RECRUITING

MODERN APPROACH

The Future Agents



In today's dynamic and ever-evolving job market, attracting new talent requires a fresh and forward-thinking approach.

The modern young worker is driven by values such as innovation, work-life balance, and career growth opportunities. They seek environments where their voices are heard and their contributions are valued. To successfully recruit this generation, one must emphasize their commitment to fostering diversity, providing continuous learning opportunities, and supporting a culture of collaboration and flexibility. By aligning with these priorities, organizations can not only attract but also retain the bright, ambitious minds that will shape the future of the workforce.

To attract seniors (older adults, typically 55+) into a sales position, a company should focus on respect, flexibility, and alignment with values and lifestyle



DEVELOPING A CAREER POSITION

✦ Phase 1: Identification & Outreach

(Day 1-2)

- Ideal Candidate Traits:
- Empathetic communicators (nurses, teachers, community leaders - active or retired)
- Passion for helping families with financial protection
- Solid listening skills and emotional intelligence
- Messaging Focus:
- Position as a mission-driven opportunity (protecting lives, securing futures)
- Flexible hours with potential for long-term income and career
- Emphasize part-time ease-of-entry—many agents start while still employed elsewhere

✦ Phase 2: Licensing & Foundational Training

(Weeks 1-2)

- Licensing Focus: Life & Health only
- Prep courses (usually 20-40 hours, depending on state)
- Recommend providers like ExamFX or Kaplan
- Practice quizzes, support calls, and reimbursement incentives
- Training Content:
- Introduction to needs-based selling (e.g. term vs. whole life, critical illness, Medicare basics)
- Ethics, compliance, and suitability



Please note that the information provided here serves as general guidelines and should not be considered as fixed timelines for progress. Each individual's journey is unique, and personal circumstances, abilities, and experiences can significantly influence the pace of development. We encourage you to use this as a flexible framework and adapt tailored to your new agent's specific needs.



DEVELOPING A CAREER POSITION

✦ Phase 3: Intro to Sales & Relationship Building (Weeks 3–12)

- Activities:

- Observation/shadowing of experienced Life & Health reps
- Roleplay sessions focusing on fact-finding and emotional rapport
- Personal market outreach—friends/family or community referrals

- Short-Term Goal:

- Write 1–3 policies (e.g. Final Expense, Term Life, Hospital Indemnity)

- Support Tools:

- Simple quoting platforms
- Client needs worksheets & presentation scripts
- Weekly coaching/check-ins



✦ Phase 4: Career Pathing & Confidence Building (Months 4–6)

- Conversion Criteria:

- Production target (e.g. \$15K–\$35K in issued premium, or 10+ lives insured)

- Demonstrated comfort with needs analysis & follow-up

- Career Pitch:

- Full-time track with access to advanced products (e.g. annuities, Medicare Advantage, DI)
- Ongoing education + potential for management if desired
- Comp structure shift to include renewals, bonuses, and contests

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DEVELOPING A CAREER POSITION

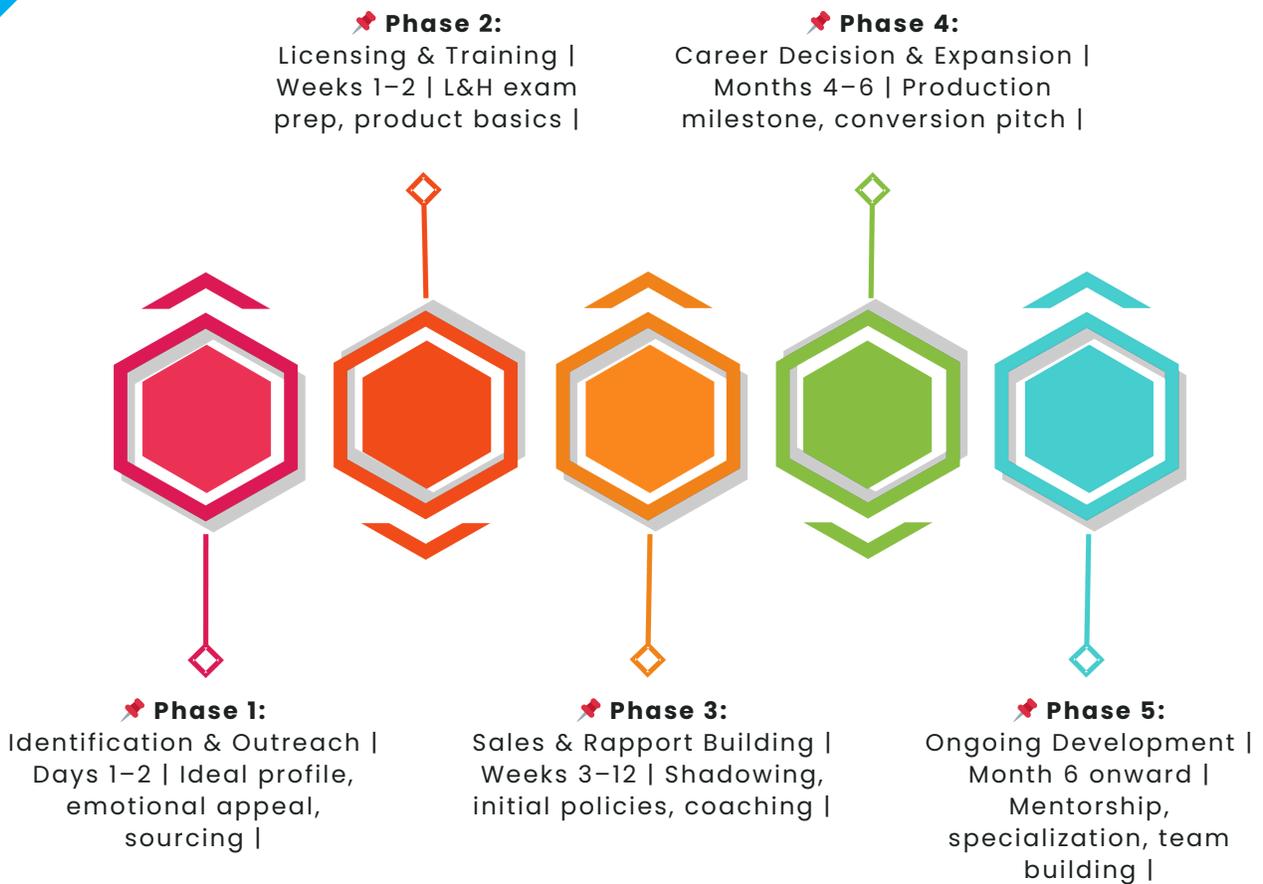
✦ Phase 5: Long-Term Development (Month 6+)

- Mentorship:
- Weekly business development meetings
- Introduce team-building and peer coaching responsibilities
- Growth Path Options:
- Specialist (e.g. Medicare, Indexed UL)
- Recruiter/Trainer track
- Leadership development for agency-building
- Retention Tools:
- Monthly incentives and recognition
- Licensing support for expanding into other states
- Annual planning retreats or training summits





TIMELINE SNAPSHOT



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IDEAL CANDIDATES

College graduates, career changers, underemployed, unemployed, and those not earning a proper income.



🎓 College graduates 🔄 Career changers 🗑️ Unemployed individuals
📄 Those who are underemployed or not earning a sustainable income
...can all be excellent candidates for a sales position – if the role is positioned correctly.

✅ Here's How to Attract Each Group:

🎓 College Graduates

What they want:

Experience

Skills they can use long-term

A foot in the door / resume builder

How to appeal to them:

"Learn real-world communication, negotiation, and marketing skills"

"Build your career with uncapped growth potential"

"We'll train you – no experience needed"

🔄 Career Changers

What they want:

A fresh start

Transferable skills to matter

Less burnout, more fulfillment

How to appeal to them:

"Use your existing experience to connect with customers and build trust"

"We welcome diverse backgrounds – sales is about people, not scripts"

"Flexible onboarding to help you transition smoothly"

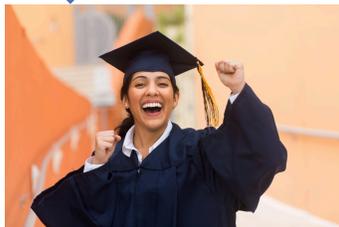
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IDEAL CANDIDATES

College graduates, career changers, underemployed, unemployed, and those not earning a proper income.



Unemployed / Laid-Off Workers

What they want:

Immediate income

Stability or stepping-stone

Support getting back on track

How to appeal to them:

"Start earning this month with our fast onboarding"

"Training provided – no previous experience required"

"Join a team that supports your comeback"

Underemployed / Low-Income Earners

What they want:

A way to increase income

Flexible hours to balance other jobs/family

Something with growth potential

How to appeal to them:

"Part-time or full-time available – earn what you're worth"

"Uncapped commissions – your hustle, your results"

"Get rewarded for your effort – not your resumé"

The Common Denominators

To successfully recruit these groups into sales roles:

Lower the barrier to entry (train them, don't expect a full sales resume)

Emphasize income potential and how quickly they can start

Support growth: show how this role can lead to higher roles or new skills

Appeal to purpose, not just quotas – make them feel like part of something bigger

TARGETING SENIOR RECRUITS

Samples - not compliance approved yet



Who better to sell our products than people who own one? Seniors trust seniors and current statistics show that up to 25% of seniors are considering re-entering the workforce. Seniors have time to get licensed, the means to support themselves, and a circle of influence in the senior market.

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