

NEW START



A 5-Year Plan, The New Start Model

You are starting a new career. There are 5 Key Truths for new insurance agents.

- 1) You are a salesperson, accept your role, and get good at selling
- 2) You are running a business, which makes you self-employed
- 3) You can't wing it; you must have activity and a plan, and track your numbers
- 4) This is hard work, work ethic until you figure it out, regardless of the hours
- 5) Take 100% responsibility; only you are responsible for your success or failure.

Once we have accepted the facts, we make a plan. A plan that anyone can follow, a system grounded in work ethic, that has proven results. There are many Models that are built around the cost of mailing clients or buying leads. Unless you are willing to invest in leads and ads, there is only one way, the fastest way, to create clients and cash flow in less than 30 days. Mastering the New Start Model will develop the skills required to build a successful career. It will train you to be a top remote salesperson and allow you to add other Models to your plan. So, we begin with the end in mind.

500 accounts in 5 years.

Start by creating the first 200 accounts. It's simple math. 2/week for 2 years or 4/weeks for 1 year. Top people, agents with a goal and work ethic, do it in 6 months. When we have 200 accounts, and you follow the 3 Step Close in every presentation, you will now generate an estimated 30% more sales through knowledge and referrals. Never base work ethic on your checkbook. Working to your financial needs will deter your goal. Work to your numbers to find out what you are capable of accomplishing. The foundation for success is 12-15 presentations per week.

500 accounts in 5 years, something every successful agent will do, is again, the math. For simplicity, we will use 500/5 years as a plan. That's when Vesting starts (ownership of renewals) and customer service and referrals dictate your day. Through knowledge and time, you should double your first-year income with a potential six-figure renewal (with Medicare accounts factored in). The plan is simple, commitment is not.

The system is 10 Integrity Leads or existing clients, 5 Leads from the Integrity T65 app around each Integrity Lead and using the 3 Step Close, obtaining 6 Legacy Safeguard referrals from every presentation will generate more than 100 places to go. We use a compliant approach, front talk, and presentation followed by the 3-step close. We lead with traditional products. We maximize our approach numbers in a consolidated area for peak performance. We get 2-3 presentations per day while booking multiple appointments. We are not a 9-5 or 5-day work week. We have goals to accomplish, one day at a time.

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"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."



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