

New Agent Calendar + Schedule + Expectations



| Week | Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|----------|--|---|--|--|---|--|---|
| 0 | This is the week of hire. During this week you need to complete the following: <ol style="list-style-type: none"> 1. Complete E-Hire Paperwork 2. Develop Your Warm List of 100 3. Begin The State Licensing Process 4. Finalize the Week You Will Be Attending Sales Academy. | | | | | | |
| 1 | Prepare goals & Schedule for New Week | 1. Travel to Sales Academy, training begins at 1PM sharp & ends Thursday PM 2. Phone for Friday selling appointments | | Contact leader prior to training with update on progress | PM: Travel home | 1. 9AM in Gridiron Office 2. 10AM-4PM demo anyone/everyone Goal: \$2,500AP | Anytime: Conduct 2 demos Goal: \$2,000AP |
| 2 | Prepare goals & Schedule for New Week + fax business from prior week | 1. 8-9AM Phone to set sales appts-use script 2. 9AM in Gridiron Office for Sales Meeting 3. 9:30AM-11AM phone to set sales appts 3. National Sales Meeting - FUZE 4. 1-4PM Field Prospecting 5. 5-8PM selling 6. Input sales stats | 9:00AM Office Meeting 2. 10:30AM Office phone to set sales appts 3. 12-4PM Field Prospecting 4. 5-8PM selling 5. Input sales stats | 8AM Office - FIT training 2. 9AM Gridiron Webinar 3. 10AM Office recruiting + set sales appointments 4. 12-4PM field prospecting 5. 5-8PM selling 6. Input sales stats | 1. 8-11AM Office recruiting, FIT training, set sales appts 2. 12-5 Prospecting & selling 3. Input sales stats | 1. 8AM Office FIT Training 2. 9AM: Gridiron Team Meeting 3. 10AM-4PM Prospecting & selling 4. Input sales stats ***FIRST PAYCHECK ASSUMING SALES MADE LAST FRI/SAT | If necessary: 1-2 demos to achieve sales goal |
| 3 | Prepare goals & Schedule for New Week + fax business from prior week | 1. 8-9AM Phone to set sales appts-use script 2. 9AM in Gridiron Office for Sales Meeting 3. 9:30AM-11AM phone to set sales appts 3. National Sales Meeting - FUZE 4. 1-4PM Field Prospecting 5. 5-8PM selling 6. Input sales stats | 9:00AM Office Meeting 2. 10:30AM Office phone to set sales appts 3. 12-4PM Field Prospecting 4. 5-8PM selling 5. Input sales stats | 8AM Office - FIT training 2. 9AM Gridiron Webinar 3. 10AM Office recruiting + set sales appointments 4. 12-4PM field prospecting 5. 5-8PM selling 6. Input sales stats | 1. 8-11AM Office recruiting, FIT training, set sales appts 2. 12-5 Prospecting & selling 3. Input sales stats | 1. 8AM Office FIT Training 2. Gridiron Team Meeting 3. 10AM-4PM Prospecting & selling 4. Input sales stats | If necessary: 1-2 demos to achieve sales goal |

Definitions

Office: We expect you to be at our physical office on time, with an open mind and the energy to accomplish the task at hand

FIT Training: Virtual interactive training to sharpen your sales, recruiting and leadership skills

Field Prospecting: Engaged in face to face meetings in the field to set appointments and conduct presentations

Input Sales Stats: We require our representatives to record their selling activity on a daily basis through an online stats portal

Team Meetings/Webinar: We expect representatives to be engaged in the 3 team meetings/webinars every week

AP: Annualized Premium as calculated by the collected monthly premium sold and multiplied by 12

Fax Business: All completed paper applications must be faxed by Sunday to Family Heritage: Fax# 844 325 6520 & follow up by call

Expectation & Conduct

Dress: While at the office and selling, we expect Business Casual attire.... Jeans with no holes are acceptable, but no shorts or flip flops...

Timeliness: We expect all representatives to be early or on time to all meetings, conference calls/webinars... don't be tardy

Sales Results: Although you are in the drivers seat of your results, we expect a minimum of \$2500 AP sold weekly for promotion

Attitude: A positive attitude must be present during all group functions... pull aside a manager to schedule a time to discuss any issues

Important Contact Information

Dan Janjigian: [President, Gridiron Financial, LLC: dan@gridironfinancial.com](mailto:dan@gridironfinancial.com) Direct: 209 732 6526

Vicky Pena: [Recruiting and Operations Manager: vpena@gridironfinancial.com](mailto:vpena@gridironfinancial.com) Direct: 512 629 0111

Michelle Decker: [Recruiting and Office Manager: mdecker@gridironfinancial.com](mailto:mdecker@gridironfinancial.com) Direct: 281 797 2516

Family Heritage Agent Line: M-F 7AM-4PM Central 440 922 5252

Family Heritage Customer Service: 440 922 5222

Family Heritage Policy Fax Number: 844 325 6520 – *always call to ensure delivery of faxed policies*