

# ELEVATE WORKSHEET



## New Hire

- Basic Training
- Evolve

### ***Elevates***

- Systems for an Efficient Office
- 

- Utilizing ECRM to Write More Business
- 

- Top Marketing Strategies
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- Quote and Onboarding Checklist
- 

- Internet Lead Process
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### ***Short Takes***

- FORM
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- Step One
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- Step Two
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# ELEVATE WORKSHEET



## New Hire cont.

### Short Takes cont.

Step Three

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Step Four

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Step Five

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Getting to GNC

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Asking for Reviews

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Asking for Referrals

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Answering the Phone

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# ELEVATE WORKSHEET



## 100 Application Development Plan

- New Hire Training Completed
- Evolve II Sales

### ***Elevates***

- 100 App Producer Development Plan
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- In-Book Marketing Plan
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- Term Life Explained
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- Five Things Whole Life Does
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- A-Z Life Appointment Process
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- Return of Premium
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- Universal Life Strategies
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# ELEVATE WORKSHEET



## Upcoming Classes

(All classes Eastern Standard time)

- ❖ February 25 - Quick Hit (10:30AM-10:45AM)  
*(GIFE Fundamentals)*
- ❖ February 26 - Elevate (1:00PM-1:30PM)  
*(2026 In-Book Marketing Plan)*
- ❖ March 4 - Quick Hit (10:30AM-10:45AM)  
*(Building Community Connections)*
- ❖ March 5 - Elevate (1:00PM-1:30PM)  
*(Compensation and Incentives)*
- ❖ March 9-11 - Evolve (1:00PM-4:00PM)
- ❖ March 11 - Quick Hit (10:30AM-10:45AM)  
*(Coaches' Open Q&A)*

## Trophy Club Links



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