

ELEVATE WORKSHEET



New Hire Training Plan

LEARNING PATH:

- Basic Training
- Evolve

Elevates

- Systems for an Efficient Office**

- Utilizing ECRM to Write More Business**

- Top Marketing Strategies**

- Quote and Onboarding Checklist**

- Internet Lead Process**

Short Takes

- FORM**

- Step One**

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New Hire cont.

Short Takes cont.

Step Two

Step Three

Step Four

Step Five

Getting to GNC

Asking for Reviews

Asking for Referrals

Answering the Phone



LEARNING PATH CLASS DATES



NEW HIRE LEARNING PATH DATES

Date	Date	Date Completed
See upcoming sessions	Basic Training	
04/07/26 - 04/09/26	Evolve (March)	
Recording in Library	Elevate - Internet Lead Process	
04/30/26	Elevate - Systems for An Efficient Office	
Recording in Library	Elevate - Utilizing ECRM To Write More Business	
06/11/26	Elevate - Top Marketing Strategies	
Recording in Library	Elevate - Utilizing the Quote and Onboarding Checklist	
Date	Short Takes	Date Completed
Recording in Library	FORM	
Recording in Library	Step One	
Recording in Library	Step Two	
Recording in Library	Step Three	
Recording in Library	Step Four	
Recording in Library	Step Five	
Recording in Library	Getting to GNC	
Recording in Library	Asking for Reviews	
Recording in Library	Ask for Referrals	
Recording in Library	Answering the Phone	

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Upcoming Classes

- ❖ April 7-9: Evolve
- ❖ April 8: Quick Hit - Pivoting on Inbound Calls
- ❖ April 13-14: Evolve II Sales
- ❖ April 15: Quick Hit - Open Q&A
- ❖ April 16: Elevate - Using ECRM to Write More Business
- ❖ April 22: Quick Hit - Creating an Excellent Customer Experience
- ❖ April 29: Quick Hit - Troubleshooting List Views Q&A

Trophy Club Links



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