

ELEVATE WORKSHEET



Sales Team Job Duties

Expectations

Daily Schedule & Office Duties

Team

Activities

ELEVATE WORKSHEET



Additional Sales Team Resources

Date	Class
Recording in Trophy Club Library	Elevate - Using the Quote and Onboarding Checklist
Recording in Trophy Club Library	Elevate - The Internet Lead Process
Recording in Trophy Club Library	Elevate - Using ECRM to Write More Business
Recording in Trophy Club Library	Short Takes - Getting to GNC
Recording in Trophy Club Library	Short Takes - Step 1: Word Tracks 1 and 2
Recording in Trophy Club Library	Short Takes - Step 2: Fact Finding
Recording in Trophy Club Library	Short Takes - Step 2 to Step 3 Transition
Recording in Trophy Club Library	Short Takes - Step 3: Coverage Explanation
Recording in Trophy Club Library	Short Takes - Step 3: Coverage Explanation
Recording in Trophy Club Library	Short Takes - Step 4: Presentation
06/03/26	Quick Hit - Understanding Short Term Disability
06/08/26 - 06/10/26	Evolve
06/11/26	Elevate - Outside Marketing
06/15/26 - 06/16/26	Evolve II Sales
06/17/26	Quick Hit - Using Life Insurance to Replace Income
06/18/26	Elevate - Term Life Explained
06/25/26	Elevate - Five Things Whole Life Does

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Upcoming Classes

(All classes Eastern time)

- ❖ June 3: Quick Hit - Understanding Short Term Disability Needs
- ❖ June 8-10: Evolve
- ❖ June 10: Quick Hit - Open Q&A
- ❖ June 11: Elevate - Outside Marketing
- ❖ June 15-16: Evolve II Sales
- ❖ June 17 Quick Hit - Using Life Insurance to Replace Income
- ❖ June 18: Elevate - Term Life Explained

Trophy Club Links



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