

FOUNDATIONS **LEARNERS GUIDE**



Office Daily Schedule

- ❖ 8:00-8:15 - Team Leader Huddle
- ❖ 8:15-8:25 - Customer Care Prioritization
- ❖ 8:15-8:45 - Account Representative Admin Time
- ❖ 8:45-9:00 - Account Representative Team Prioritization
- ❖ 9:00-9:45 - Account Representative Training Time
- ❖ 10:00-11:00 - Power Hour
- ❖ 11:00 - Customer Care Team Prioritization Check-In
- ❖ Lunch - Assign Time
- ❖ 2:00-3:00 - Power Hour
- ❖ 3:00 - Customer Care Team Prioritization Check-In
- ❖ 4:00 - Account Representative Check-In

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Agent Core Duties

Customer Conversations

Team Development

Marketing and Recruiting

Strategic Planning

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Recruiting and Hiring

Virtual Interview

Recruiting Visit

Candidate Review

Offer

Licensing

Start Basic Training

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Agent Sample Schedule

For MOAs: Rotate weekly Monday, Tuesday, Wednesday

Monday	9:00-9:45	Training (Rotating between offices)
	10:00-11:30	Networking Meeting
	11:30-12:30	Lunch Meeting
	12:30-1:00	Compliance/ System Adherence
	1:00-3:00	Sales/Service Training
Tuesday	8:00-9:30	Networking Meeting
	9:45-10:00	Meeting Preparation
	10:00-10:45	Marketing/Production Meeting
	11:00-3:00	Appointments (4 per day, 16 per month)
Wednesday	10:00-3:00	Appointments (5 per day, 20 per month)
Thursday	8:00-10:00	Administration
	10:00-2:00	Appointments (4 per day, 16 per month)
	2:00-4:00	Sales Training/Interviews
	4:00-EOD	Prioritize personal relationships
Friday		Personal Day