10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

WEEK 1 TRAINING TOPICS	DATE COMPLETED	AGT/MGR INITIALS
WELCOME • Introductions to the office team • Tour of the office		
LIVE A LIFE OF SIGNIFICANCE/REAL LIFE STORIES • Share or borrow a story • Watch "Real Life Stories" videos at www.lifehappens.org • Visit the Transamerica and TAN YouTube channels		
GOALS & EXPECTATIONS • Complete Hoopis Onboarding Curriculum • Begin the Performance Plus Business Planning Tool • Review Prospecting Playbook • Develop Prospecting Hotlist • Review Company and Office Expectations		
GETTING ORGANIZED • Setup Login and Password to Hoopis • Review Online Advisor and complete tutorial • Setup Microsoft 365 account and complete TEAMS overview • Plug in dates on Outlook Calendar - Webinars, Meetings, Etc. • Prepare Education Plan: Track and add dates to Outlook • Personal vs. Professional Time (Red, Yellow, Green) • Complete Anti-Fraud Training - TAANI Under Training and Development • Complete LTC Certification • Setup direct deposit in workday • Obtain TAN Career Agency Contact Directory • Complete any required state Annuity Training • Register for AMS training series		

Week 1 training continued on page 2

NECESSARY TOOLS
☐ Laptop/Tablet
☐ Internet Access
☐ Prospecting Playbook
☐ TAN Planning Conference (APC) Form
☐ TAANI and TAPremier Passwords
☐ Product Guides
☐ Prospecting Hotlist
☐ Telephone Prompter

10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

WEEK 1 **TRAINING TOPICS** *(continued)*	**DATE COMPLETED**	**AGT/MGR INITIALS**
TELEPHONE PROMPTER • Review all sections • Role play with your Associate Director using the Prospecting Playbook • Review Do Not Call Guidelines • Set appointments using the Prospecting Hotlist		
ONLINE RESOURCES • Become familiar with TAN Central • Register for Single Sign On • Become familiar with TAANI & TAPremier Websites • Become familiar with Life Illustrator • Download Apps: Life Sales Mobile, Final Expense Calculator		
SOCIAL MEDIA Update your social media sites: • Facebook - Create Facebook business page • LinkedIn • Schedule Appointment for professional photo		
PRODUCT REVIEW • Transamerica Financial Foundation IUL w/ LTC Rider • Transamerica Financial Choice IUL		

YOUR HOMEWORK

- Conduct joint fieldwork with your Associate/Managing Director
- Daily Activity: 10 calls, five prospects, three interviews
- Enter your production numbers into Online Advisor
- Reference your 14-Month Roadmap to see how you are pacing towards your benchmarks
- Begin weekly APC debriefs using the APC form
- Complete the following acknowledgements within 14 days of hire date: Transamerica Employee Handbook, 2022 Annual Aegon Code of Conduct and Transamerica Business Conduct Policy
- Sign your Agent Insurance Guide
- Complete the Grand Opening announcing your new practice with Transamerica Agency Network

10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

WEEK 2 TRAINING TOPICS	DATE COMPLETED	AGT/MGR INITIALS
RECAP WEEK 1		
SALES PRESENTATION • TAN Sales Process • TAN Sales Presentations • Explain and Order Prestige Brochure and Business Cards • Review Dime Work Sheet, FNA and other Fact Finders Virtual Appointment Preparation		
PRODUCT REVIEW • IUL Product Review • Trendsetter Super & LB • Lifetime Whole Life • Solutions Whole Life		
UNDERWRITING & I-GO E-APP • Review Underwriting Guidelines • Foreign National Requirements • App Tutorials • TAN Forms Page		
MARKET ID • Develop Marketing Strategy • 4 Food Groups + 1 • 36 Different Marketing Strategies • Download LinkedIn and Facebook Contacts to Online Prospecting Playbook		
COMPENSATION • Review the Representative Compensation Schedule • Review the Compensation Brochure • Review the Compensation Summary Flyer • Explore the Compensation Calculator Tool • Enter your production numbers into Online Advisor		

NECESSARY TOOLS

- ☐ Product Guides
- ☐ TAANI and TAPremier Passwords
- ☐ Action Planning Conference (APC) Form
- ☐ Prospecting Hotlist
- ☐ Telephone Prompter
- ☐ Online Advisor
- ☐ Underwriting Guide
- ☐ TAN Rep Marketing Plan

YOUR HOMEWORK

- Conduct joint field work with your Associate Director
- Daily Activity: 10 calls, five prospects, three interviews
- Conduct weekly APC debrief using the APC form
- Reference your 14 Month Roadmap to see how you are pacing towards your benchmarks

10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

WEEK 3 TRAINING TOPICS	DATE COMPLETED	AGT/MGR INITIALS
RECAP WEEK 2		
ROLE PLAY • Closings: feel, felt, found • Develop and practice your "Elevator Speech"		
RIDER OVERVIEW • Income Protection Option • Disability Income Rider • Living Benefit Acceleration Process		
NEW BUSINESS PROCESS • Best Practices • Managing Amendments		
REVIEW PENDING REPORT • Review all Transamerica Riders • Review Application Tutorials • Review Disability Income Rider and the Living Benefit Acceleration Process		
UFS PRODUCT REVIEW • AMS • CRUMP • TEB • Lumico		
CONTINUE TO PRACTICE • Telephone Script • TAN Sales Process • Application - Life Illustrator		
TELEPHONE SESSION		

NECESSARY TOOLS
☐ Growing Your Business Through Referred Leads
☐ Product Guides
☐ Representatives Pending Report
☐ Prospecting Hotlist
☐ Closes: feel, felt, found

Complete the following courses within 45 days from your hire date:

- ☐ New Employee 2022 Information Security
- ☐ New Employee 2022 Annual Anti-Fraud
- ☐ New Employee Global Anti-Money Laundering and Sanctions
- ☐ HIPAA - Privacy and Security Rules for Covered Entities
- ☐ Workplace Harassment Prevention for Employees (CA & IL employees are assigned state specific harassment prevention modules)

YOUR HOMEWORK

- Conduct joint field work with your Associate Director
- Daily Activity: 10 calls, five prospects, three interviews
- Enter your production numbers into Online Advisor. Also, make sure to keep your client data up to date.
- Conduct weekly APC debrief using the APC form
- Reference your 14-Month Roadmap to see how you are pacing towards your benchmarks

10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

WEEK 4 TRAINING TOPICS	DATE COMPLETED	AGT/MGR INITIALS
RECAP WEEK 3		
PRACTICE TELEPHONE PROMPTER		
SALES PRESENTATION • Review TAN Sales Process • Review TAN Sales Presentations • Review Dime Work Sheet, FNA and other Fact Finders • Review I-go and paper application		
PRACTICE iGO E-APP		
PRACTICE REFERRED LEADS		
EVALUATE SALES PROCESS START TO FINISH		
LIFE ILLUSTRATOR • Review FFIUL and FCIUL Solve Options		
ONLINE PROSPECTING PLAYBOOK • Review Personal Financial Inventory (PFI) material • Assign a representative to create a personal PFI book and build a copy to use on appointments • Complete a paper application		
POLICY DELIVERY & ANNUAL REVIEW • Review Personal Financial Inventory (PFI) Material • Assign representative to create a personal PFI • Review Everest Benefits		

YOUR HOMEWORK

- Conduct joint field work with your Associate Director
- Enter your production numbers into Online Advisor
- Reference your 14-Month Roadmap to see how you are pacing towards your benchmarks
- Daily Activity: 10 calls, five prospects, three interviews
- Conduct weekly APC debrief using the APC form
- Complete Benefits Enrollment

NECESSARY TOOLS

- ☐ Policy Delivery Check List
- ☐ Policy Delivery Best Practices
- ☐ Personal Financial Inventory (PFI)
- ☐ DIME Worksheet
- ☐ TAN FNA Worksheet
- ☐ Sales Track Process Guide
- ☐ Growing Your Business Through Referred Leads

10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

WEEK 5 TRAINING TOPICS	DATE COMPLETED	AGT/MGR INITIALS
RECAP WEEK 4		
REVIEW GETTING ORGANIZED • Update Online Advisor • Personal vs Professional Time (Green, Yellow, Red) • Outlook Calendar Organization		
REVIEW PRODUCTS • Product portfolio • Underwriting guides • Agent guides		
REVIEW SOFTWARE • Life Illustrator • iGO, Final Expense Calculator and Life Sales Mobile		
REVIEW PROSPECTING PLAYBOOK • Online		
REVIEW MARKETING PLAN • Prospecting Playbook • Prospecting Hotlist • 4 Food Groups • Mining Book of Business Brochure		
REVIEW AGENT REPORTS AND HOW TO COMPLETE AGENT PORTION OF APC • TA Premier Reports - P+ Commission Statement - Review Career Rep Bonus - Review Agency Policy Detail - Review Letters to Customers • Daily Policy Detail Progress Report (MTD/PTD)		

NECESSARY TOOLS
☐ Laptop
☐ Internet Access
☐ Product Guides
☐ Underwriting Guides
☐ TAN Rep Marketing Plan

YOUR HOMEWORK

- Conduct joint field work with your Associate Director
- Enter your production numbers into Online Advisor
- Daily Activity: 10 calls, five prospects, three interviews
- Conduct weekly APC debrief using the APC form
- Reference your 14-Month Roadmap to see how you are pacing towards your benchmarks

10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

WEEK 6 TRAINING TOPICS	DATE COMPLETED	AGT/MGR INITIALS
RECAP WEEK 5		
REVIEW UNDERWRITING GUIDE • Review Conversation Guide		
DEVELOP CENTERS OF INFLUENCE (COI'S) • Lawyers, Realtors, CPA's, Small Business Owners, etc. • Build COI Hotlist • Join a networking group		
REVIEW ADVANCED MARKETS CONCEPTS • Executive Bonus • Key Person Foreign National		
TELEPHONE PROMPTER • Review all sections • Role play with your Associate Director		
REVIEW REPRESENTATIVE REPORTS AND TOOLS		

NECESSARY TOOLS

- ☐ Telephone Prompter

YOUR HOMEWORK

- Conduct joint field work with your Associate Director
- Reference your 14-Month Roadmap to see how you are pacing towards your benchmarks
- Daily Activity: 10 calls, five prospects, three interviews
- Enter your production numbers into Online Advisor
- Conduct weekly APC debrief using the APC form

10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

WEEK 7 TRAINING TOPICS	DATE COMPLETED	AGT/MGR INITIALS
RECAP WEEK 6		
REVIEW PRODUCT • Question and answer with Representative		
REVIEW SOFTWARE • Life Illustrator • Review Leads App and Leads App Training • iGO, Final Expense Calculator and Life Sales Mobile		

NECESSARY TOOLS
☐ Product Guides

YOUR HOMEWORK

- Conduct joint field work with your Associate Director
- Daily Activity: 10 calls, five prospects, three interviews
- Reference your 14-Month Roadmap to see and how you are pacing towards your benchmarks
- Conduct weekly APC debrief using the APC form
- Enter your production numbers into Online Advisor
- Role play calls to referrals with your upline manager

10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

WEEK 8 TRAINING TOPICS	DATE COMPLETED	AGT/MGR INITIALS
RECAP WEEK 7		
SALES PRESENTATION ROLE PLAY • TAN Sales Process and open ended questions along with transitions • Prestige Pamphlet • Review DIME Worksheet and Financial Needs Analysis (Paper/Digital)		
REVIEW NEW BUSINESS PROCEDURES • Amendments • Review how to track pending business • Underwriting Best Practices		
PRACTICE • Telephone script • Closing • Referred leads (feel, felt, found—make sure agent can demonstrate proficiency with each tool)		

NECESSARY TOOLS
☐ Field Guide Reference
☐ Telephone Prompter
☐ Growing Your Business Through Referred Leads
☐ TAN Sales Presentation
☐ Underwriting Guide

YOUR HOMEWORK

- Conduct joint field work with your Associate Director
- Reference your 14-Month Roadmap to see and how you are pacing towards your benchmarks
- Daily Activity: 10 calls, five prospects, three interviews
- Conduct weekly APC debrief using the APC form
- Enter your production numbers into Online Advisor

10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

WEEK 9 TRAINING TOPICS	DATE COMPLETED	AGT/MGR INITIALS
RECAP WEEK 8		
REVIEW/DEMONSTRATE WITH MANAGING DIRECTOR • Telephone Prompter (MD sit in on phone clinic) • TAN Sales Process and open ended questions • DIME Worksheet and FNA • Closes (MD goes on appointment) • iGO e-app • Paper Application • Referred Leads (from start to finish) • Policy Delivery • Compensation • Leads App		

YOUR HOMEWORK

- Conduct joint field work with your Associate Director
- Reference your 14-Month Roadmap to see how you are pacing towards your benchmarks
- Daily Activity: 10 calls, five prospects, three interviews
- Enter your production numbers into Online Advisor
- Conduct weekly APC debrief using the APC form

NECESSARY TOOLS
☐ Telephone Script
☐ Growing Your Business Through Referred Leads
☐ Prospecting Hotlist
☐ Telephone Prompter
☐ Compensation Materials
☐ Policy Delivery
☐ Policy Delivery Best Practices

10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

WEEK 10 TRAINING TOPICS	DATE COMPLETED	AGT/MGR INITIALS
PRODUCT AND MARKETING CONCEPTS • Smarter IUL • Long Term Confidence • Gift For Life		
UNIVERSAL FINANCIAL SERVICES • AMS • CRUMP • TEB • Lumico		
CENTER OF INFLUENCE (COI) PROGRESS CHECK-IN • Lawyers, Realtors, CPA's, Small Business Owners, etc. • COI Hotlist follow-up • Networking group follow-up		
DEVELOP NEW PROSPECTING IDEAS WITH MD/AD		
REVIEW MARKETING PLAN • Prospecting Playbook • Prospecting Hotlist • 4 Food Groups • Mining Book of Business Brochure		
CLIENT ANNUAL REVIEW MEETING • PFI (opportunities for existing clients) • Everest review		

NECESSARY TOOLS
☐ OFS Materials
☐ Prospecting Playbook
☐ Marketing resources (websites, contact information, etc.)
☐ Personal Financial Inventory (PFI)
☐ TAN Rep Marketing Plan

YOUR HOMEWORK

- Conduct joint field work with your Associate Director
- Review details of Annual Awards, Annual Conference & MDRT qualifications
- Reference your 14-Month Roadmap to see how you are pacing towards your benchmarks
- Daily Activity: 10 calls, five prospects, three interviews
- Enter your production numbers into Online Advisor
- Conduct weekly APC debrief using the APC form

10 WEEK ONBOARDING CHECKLIST

FOR TAN CAREER INSURANCE REPRESENTATIVES

OTHER RESOURCES TO REVIEW
• Transamerica Employee Benefits • Small Business Owner Fact Finder • 1035 Exchange Training • List Bill Training • Advance Markets Resources • Career Advancement Opportunity • Foreign National Training • Transamerica Financial Advisors

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AGENCY NETWORK