

Transamerica New Rep Onboarding Curriculum

Week 1: Prospecting & Telephoning

1. The Basics of Prospecting – Kissing Frogs
2. Developing a Prospecting Mindset
3. Understanding Basic Prospecting Resources
4. Initial Warm Sources: Friends, Family & Acquaintances
5. Opportunities Are Found Within the Relationship
6. How To Find Networking Opportunities
7. Prospecting: How To Build Relationships - Part One
8. Prospecting: How To Build Relationships - Part Two
9. Understanding Referrals - Part One
10. Understanding Referrals - Part One
11. Developing a Referral Mindset – Bill Cates (HPN)
12. Developing a Prospecting Mindset – Joey Davenport (HPN)
13. Embracing An Abundant Mindset for Ferocious Prospecting – Chris Gandy (HPN)
14. Keys to Prospecting & Telephoning – Chris Koon (HPN)
15. Strategies for Increasing Prospecting Success – Sabine Robinson (HPN)
16. Language for Phoning & Booking Meetings – Vince Silva (HPN)
17. High Impact Language for Overcoming Common Phoning Objections – Jim Effner (HPN)
18. Telephone Habits Which Deliver More Appointments - Part One
19. Telephone Habits Which Deliver More Appointments - Part Two
20. Tips to Improve Telephoning Results

Week 2: Prospecting, Initial Meeting & Factfinding

1. Understanding and Building an Elevator Talk
2. What Do You Do? The Elevator Talk
3. Language For Overcoming Common Prospecting Objections – Dave Resseguie (HPN)
4. Strategies When Asking for Referrals: A Role Play Demonstration – John Laurito (HPN)
5. Overcoming Obstacles When Asking for Referrals – John Laurito (HPN)
6. Techniques to Become a More Effective Active Listener – Penny Phillips (HPN)
7. Active Listening Skills – Joey Davenport (HPN)
8. The Approach: The Most Difficult & Artful Part of the Sales Process – Don Badgley (HPN)
9. Language & Techniques During the Initial Appointment – Kyle Gleich (HPN)
10. Connecting Through Your Approach Language – Marc Jacobson (HPN)
11. Making Connections Through Questions – Maribeth Kuzmeski (HPN)
12. Key Purpose of Factfinding: Uncovering Their "Why" Through Questions—Annette Hammortree (HPN)
13. Creating a Factfinding Experience – Leo Tucker (HPN)
14. Must Ask Questions To Connect Emotionally In the Factfinder – Rick Hu (HPN)
15. Using Questions to Solve Problems Vs. Sell a Product – Eszylfie Taylor (HPN)
16. Helping Clients Build Better Habits: Being a Financial Specialist – Ed Deutschlander (HPN)
17. Defining and Understanding Target Markets
18. Understanding Centers of Influence
19. Working With Centers of Influence - Part One
20. Working With Centers of Influence - Part Two