

Worksite Training Certification Checklist

Agent must be able to demonstrate these skills and tasks to be approved at the certification meeting.

Worksite Prospecting Certification Checklist

- Can use Phone or Walk & Talk scripts effectively to complete minimum of 60 surveys (Review Prospecting Notebook)
- Can use Phone or Walk & Talk scripts to set minimum of 6 appointments
- Demonstrate ability to build rapport and obtain information from the gatekeeper
- Demonstrate ability to overcome most common objections from gatekeeper/business owner

Worksite Presentation Certification Checklist

- Observed 2 worksite case closes start to finish
- Closed at least 1 case not from warm market
- Can explain Section 125 tax savings for employers and employees
- Can complete Required Forms Packets accurately
- Demonstrate ability to overcome most common decision maker objections
- Can explain features of: Child Safe, \$3,000 ADP, Group Term, Career Life Plus, Modified Life, Cancer, Accident
- Can explain three periods of Worksite: Enrollment, Deduction, Effective Date
- Can list the 7 times to meet with bookkeeper
- Can explain importance of writing quality business, how DCN/Persistency works, and how it impacts pay
- Can explain how they are paid
- Has reviewed new Agent expectations for first 90 days and MRO with regards to WAR
- Has reviewed Career Track expectations

Agent Name: _____

Start Date: _____ Certification Date: _____

Agency Owner Signature: _____

Agency Director Signature: _____

Supervising Agent Signature: _____

Agent Signature: _____