

Get Ready to Get Dialing

★ During Contracting Process

Download, print out and learn the Telesales Script

Log Into Agent Toolkit; practice using the underwriting & quoting features

As each of your carrier writing numbers arrive:

- Create your carrier portal log-in
- Navigate to their E-App; practice filling it

★ Purchase Leads

Caboom! Statewide FE leads recommended

- 50 Leads
- Minimum of 5 States
- Upload your photo
- Include your NPN
- Do not select to have the lead book appt or call you!
- Input your CRM API key
- -When your confirmation email arrives, reply requesting multiple campaigns

★ Your Workspace

Dial in a quiet, distraction-free area

Keep your desk/work table as clean/clear as possible

Open, log-in and prepare your web tools in browser tabs:

Monitor/Device 1:

- Leads spreadsheet and/or CRM

Monitor/Device 2:

- Underwriting Toolkit
- Am Am e-App
- SBLI e-App
- AIG/Corebridge e-App
- Email

Have your printed Script, Fact Finder sheets and Activity Tracker at hand