

Missouri East Magic Flight Plan Checklist ONE

Training with DSC/ RSC:

- ☐ Login Field Force Services
- ☐ Aflac Email Access (Computer and Mobile)
- ☐ PingID Setup
- ☐ AgentHub App
- ☐ Toolbox Set Up on Field Forces Services
- ☐ CCLM User Access Requested
- ☐ State Website Access
- ☐ Academy Connect Access
- ☐ Register for upcoming New Associate Flight School (NAFS)

Basic Training

- ☐ Basic Major Medical
- ☐ How Aflac fits into the marketplace
- ☐ Common Features of Aflac Products & Solutions
- ☐ Core Product Knowledge

(continued...)

Team Onboarding:

- ☐ Review Associates Responsibilities and DSC Responsibilities
- ☐ Income vs. Activity Tracker / Goal Setting
- ☐ Calendars & Socials Synced (Meetings, Trainings, Team Group Texts, Etc...)
- ☐ Create a Marketing Plan to Associate's Goal (IE: Fast Start, Super Fast Start, Fireball)
- ☐ Calendar this plan with associate

Associate Homework

(must be completed prior to New Associate Flight School.)

- ☐ NAFS101: Aflac History and Brand Identity
- ☐ NAFS202: Navigating the Market
- ☐ Everwell Certification Courses
- ☐ BA103: Anti Money Laundering Course

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CHECKLIST TWO

Business Owner Approach Conversation & Marketing

- ☐ CCLM Usage and Training
- ☐ Marketing Manager and Aflac Workforces Report (Lead Elevation Prep

Conversation Skill Set:

- ☐ H.R.M.A.P. Employer Pain Points
- ☐ OCPs - Industry and/or Pain Point
- ☐ 10-30 Approach
- ☐ Using A.D.A.P.T. to handle objections
- ☐ Lead Elevation and other Follow Up Best Practices
- ☐ What to do AFTER setting an appointment? (Thank you Note, SIC Request, Etc...)

Action Items

- ☐ Learn basics and best practices to create a cold call list for several relevant locations
- ☐ Cold Lead Generation (Salesgenie, Reference USA, etc)
- ☐ Scrub and Quality Process
- ☐ COI List Created & Contacted (Referral marketing)
- ☐ Who Do You Know List (Warm lead list)

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CHECKLIST THREE

BUSINESS OWNER APPOINTMENT & EDGE

- ☐ Engage - Purpose, technique, structure
- ☐ Discover - 4Cs, High Yielding Questions, Listening for what's important
- ☐ Guide - HRMAP Pain points connected to People | Product | Platform Solution
- ☐ Execute - Conversation to set up ideal Conditions

*** DM Conversation Outline from NAFS attached in Training Resources, if needed*

Prepping for a DM Appointment

- ☐ Thank you note/ Appt Confirmation
- ☐ Product Mix Strategy & Why
- ☐ SIC Express & Smart Quote Training
- ☐ Prep Materials for Appointment (What goes in YOUR DM folder and WHY)

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CHECKLIST FOUR

ENROLLMENT Procedures

- ☐ Setting up an account in Everwell
- ☐ Organizing an Enrollment & Marketing Enrollment
- ☐ Budget Selling Policyholder Conversation
- ☐ PDAs and other Logistics & Best Practices
- ☐ Referral Conversation

POST Enrollment Procedures

- ☐ Deduction Delivery / Service Guide
- ☐ Transmitting Business
- ☐ Handling Pended Business
- ☐ Invoice Reconciliation Meeting
- ☐ Setting up servicing plan
- ☐ Wellness Benefit & Claims Overview