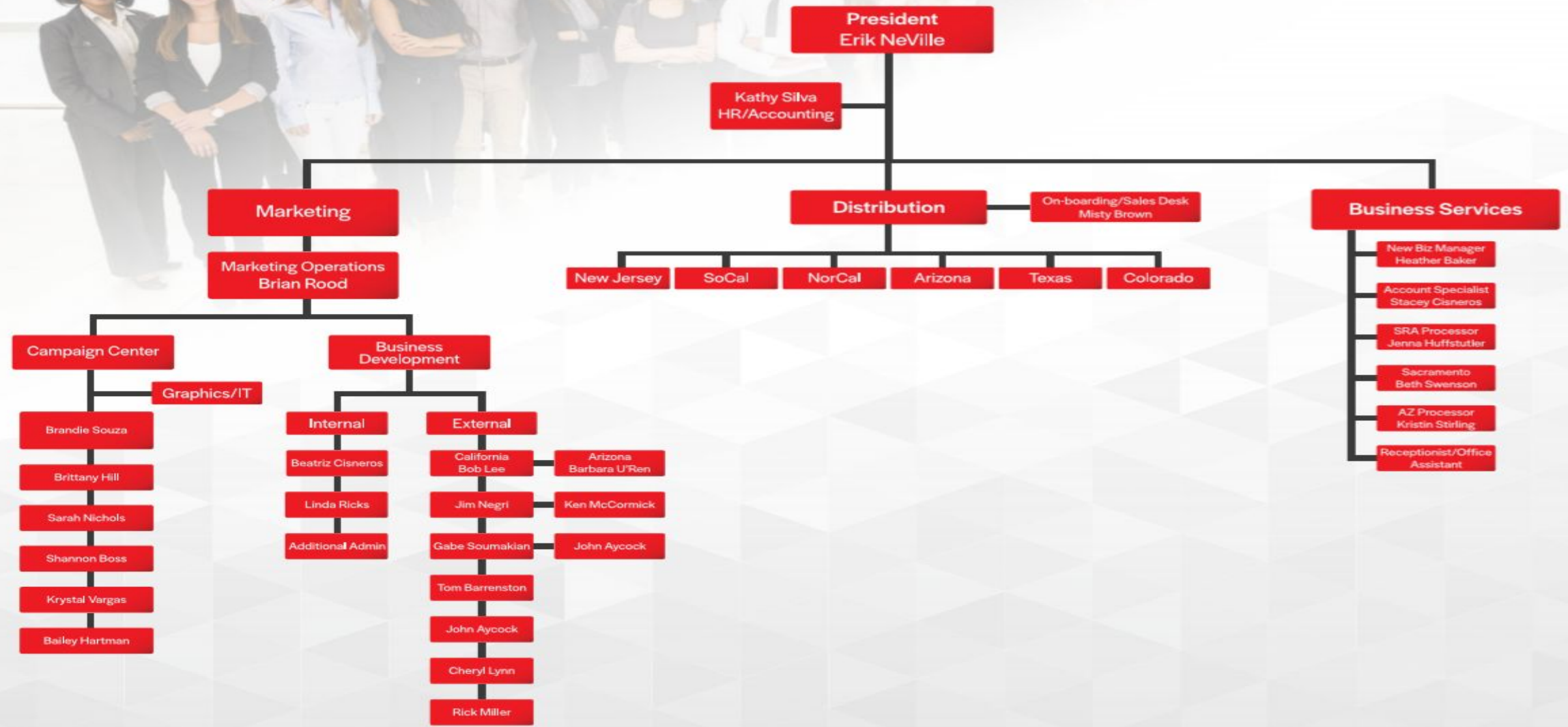


Focus & Vision 2019



FOCUS AND VISION 2019

- **Staff Changes, Focus, Org Chart**
- **Agent Development**
- **Client Focus**
- **Access / Business Development Strategies**
- **Agent Expectations**



Agent Development

- **My Focus 80% Focused on Agents: Core of the Business**
- **More Recruiting**
- **Better On-boarding Experience**
- **More Robust Training**
 - **Training Online Portal Redone by March 1st**
 - **Classroom training in Oakdale once / twice a month**
 - **Weekly Webinar training, mentoring and coaching**
- **Helping Agents build their businesses**
 - **Override structure and contracts coming soon**
- **Certification for Superintendent Expectations**

Client Focus

- **Why?**
 - **Incentives, more commissions and revenue**
 - **BD Team anxiety**
 - **Active Superintendent concerns**
- **SalesForce**
- **Agent Expectations**
- **Call Center / Internal sales team**

Access / Business Development

- **BD Team Focus and Changes**
 - **New Team members and changes**
 - **Geographical / Agent focus and needs**
 - **Training and Expectations**
 - **More Agent Tag alongs**
- **Agent Certification to Run BD events – Encompass**
- **Go Deeper with Existing Relationships**
 1. **Retirement Only Platform**
 2. **Comprehensive Platform**
- **Brian Rood**: 125 Department Head
- **Beatriz**: BD support, relationship management and implementation

Agent Needs and Expectations

- SalesForce Campaign invites: Encompass info
- Encompass E-App training
 - Agent only
 - Advisor and Agent
- Need Licenses by **August**:
 - **Series 65**: Put in the time
 - **Health**: 125 Enrollments
- Work Book of Biz: Promises to Districts
- Finalize Campaigns / Clean Complete data:
- App splits on BD / High Level campaigns