

Friday

1:00pm-3:30pm 2-Hour Introduction: Worksite Advantage Presentation Suggested Topics

A. Who We Are

- Begin with personal introduction.
- Provide some background information about yourself. Include, how you came to join the Company. Share some of your history with the Company in regard to personal growth and success.
- Explain who Globe Life Liberty National Division is, provide a brief history about our Company, how Liberty National Division was founded and how we've become the successful and growing company we are today.

B. Why We Do What We Do

- Share some of your personal experiences in your career. Provide examples of how you have personally witnessed the capacity to which our products and services impact the lives of individuals and families, providing them an outcome of security and stability in the aftermath of an unforeseen event, catastrophe or the loss of a loved one.

C. How We Are Different

- Explain how we differ from other insurance companies. Explain that we prefer to invest company savings into a better product line at a more affordable price for clients, and we also invest those savings into our introductory offers, as well as agent compensation.
- Emphasize how we prefer to meet the needs of our clients, within their means...providing them security at a starting point they are comfortable with, rather than burdening them with high-cost coverage.
- Present the 'Needs Planner'. Ask for a volunteer and demonstrate how it is used as a tool that allows us to better serve and identify the needs of our clients. Educate them on why there truly is a need for the products we offer.
- Explain the Section 125 Cafeteria Plan model and its benefits using the Group Term 100 brochure and Pre-Tax Savings model. Review the Blue Section 125 Benefits Brochure, pointing out which of our plans fall under this category.
- Introduce Liberty National Division's Group Term Life Insurance features and how they compare to 'traditional' Group Term Life Insurance using page 5 of the Liberty National Division Worksite Advantage Benefits Offered for Employers brochure (R-3762).

D. Career Tracker

- Present the Career Tracker booklet and explain our compensation and pay structure for each ranking within the Agency.

E. Training Preparation

- Give each a copy of all suggested scripts and a copy of the Presentation.
- Give a demonstration of the Presentation and the approach and suggest memorizing the 'Approach to the Decision Maker' and the objections at the approach.
- Review the 'Script Packet' in the folder and explain how it corresponds with the videos on 'Worksite On Demand'. Recommend they study the 'Approach to the Decision Maker, Objections.' before the presentation and the 'Objections' after the presentation over the weekend. Studying the 'Objections' will be preparation for the coming week.

F. Worksite Mobile

- Explain how we track activity and how WSM serves as a tool to identify our strengths and weaknesses, allowing us to pinpoint the specific area(s) in which further training is needed. It is a system that allows us to track an individual's activity and growth.
- Explain how this information is reported on a daily basis.

Examples of Materials to Use for 'Welcome Orientation'

- Next two weeks Training schedule
- Blue Section 125 Benefits Offered brochure
- Decision Maker Fact Finder
- PAC script
- Worksite Mobile Users Guide
- Needs Planner
- Group Term 100 brochure
- Paid Up at 65 Brochure
- Career Tracker booklet
- Worksite Presentation
- Agent/SA Worksite Workbook (WAR Report)
- Daily Training Evaluation Form
- Sign-In sheet