

Suggested EPIC Dashboard Goals

50% Decision Makers Met from Walk-Ins

33%+ Decision Makers Conversion

Pregame

Materials Needed for Day:

- EPIC app on Phone or iPad/Tablet
- Presentation Book
- Benefits Fact Sheet
- Section 125 Required Forms Packet

Checklist:

- Route in EPIC
- Goal for Personal Recruits
- Discuss 10 Blocks of Time/4-Week Forecast Commitment
- What days can appointments be set for?
- Role Play Gatekeeper (Using Gatekeeper Name)
- Role Play Intro to Business owner (using each PAC's Decision Maker's name and research)
- Role play Objections before the Presentation (use the days and times previously discussed for "busy" objection)

Game

EPIC Field Training Best Practices:

- Log every Walk In using 20/40/60/80/100
- Be specific on the details with Follow up notes in the research portion of the Lead
- Change the 'Follow Up Status' on the Lead when logging Hot Follow Ups
- Schedule Appointments on an agreed upon date & time confirmed with the Decision Maker
- Practice the Presentation before each appointment
- Scheduled Follow-Ups are a specific date and time to return to the business in efforts to see the Decision Maker, complete a presentation and close a case
- Continually practice role playing the Gatekeeper, Introduction to Decision Maker and Objections before every Walk-In
- Provide coaching based on the system BEFORE and AFTER each Walk-In

Halftime

EPIC Dashboards:

- Review EPIC Dashboards in comparison to 10 Blocks of Time Commitment
 - # of Walk-Ins
 - % DMs Met
 - % DM Conversion
 - % of Appts Set
 - % Presentations
 - Cases Closed

Checklist:

- Practice Presentation
- Personal Recruit

Post Game

EPIC Dashboards:

- Review EPIC Dashboards in comparison to 10 Blocks of Time Commitment
 - # of Walk-Ins
 - % DMs Met
 - % DM Conversion
 - % of Appts Set
 - % Presentations
 - Cases Closed
 - Coach on areas of opportunity based on the Worksite System

Checklist:

- Discuss Personal Recruiting commitment/results
- Confirm where to meet tomorrow morning

Sample Coaching Using Activity Percentages

Walk-Ins: Decision Makers	Above 30%	20% – 30%	Below 20%
Presentations/Appointments Set: Decision Makers	Above 33%	20% – 33%	Below 20%
Presentations: Case Closed	Above 25%	15% – 25%	Below 15%

- Agent is performing at a satisfactory level
- Have conversation with agent to address inadequate levels of performance
- Agent is frozen, and one-on-one training and in-field training is needed with their SA and/or AD

When coaching using the percentages, relate it to the suggested scripts/worksites system. Did they do each step for each percentage for every Walk In?

If not, what steps were missed for that percent that the agent can implement for the following Walk-In?

Gatekeeper (30% – 50%)

Dashboard: # of Decisions Makers Seen from Walk Ins

- Rapport
- Ask for DM
- Disengage
- Answer Gatekeeper Questions

Decision Maker (+33%)

Dashboard: # of Appointments Set from DMs Seen

- Rapport using research
- Intro to DM
 - Tie-down question
- Objections
 - Tie-down question

Close (+25%)

Dashboard: Closed Cases from Presentations

- Benefit Fact Sheet
- Presentation
- Closing Question
- Objections
- Solidifying the Close
- Section 125/Employee List/Set Enrollment