

New Agent Checklist

1. Join Empower

- a. Log-in/Create Account on SureLC.
- b. Request contracts—work with Empower team to finalize contracts. Keep an eye out for important email communications from Empower team.
- c. Complete carrier certification if applicable.

2. EBI Portal

- a. Log into the Empower Agent Portal.
- b. Learn to successfully navigate your Agent Portal.
- c. Complete the Agent Orientation Training.
- d. Request access to additional trainings if needed.
- e. Dashboard and material access within the portal is dependent on your contracts. Request access to applicable product line resources after your contracts are in place.

3. Regional Sales Director (RSD)

- a. Create a Marketing Plan with the help of your RSD.
- b. Begin the Time Blocking Business Plan Calendar.
- c. Sign up for your RSD's recurring meetings.

4. Commissions

- a. Submit necessary documents to the Empower Commission team to set up your payment method of choice.
- b. Review the Commission FAQ page and address additional questions with your Regional Sales Director.

5. Get to Know Our Product Specialists

- a. Sign up for weekly trainings with our product specialists. This is your opportunity to learn more about selling and prospecting strategies as well as ask questions during a live training seminar.

6. Empower Tools & Lead Programs

- a. Request and set up access to quoting and enrollment tools.
- b. Learn about the Empower Lead programs and request access to programs that could benefit you.

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7. Carriers

- a. Learn how to navigate each carrier portal.
- b. Review and Practice each carrier application process.
- c. Order carrier sales materials.
- d. Begin connecting with your local carrier reps. Maintaining good relationships with carrier reps may afford you extra opportunities or marketing assistance.

8. Marketing

- a. Locate and download marketing materials from the Empower Agent Portal.
- b. Sign up for monthly social media trainings (gain access to a yearly content calendar workbook when you do!)
- c. Download and review the yearly agent guidebook from the portal.

9. Prospecting

- a. Begin calling Prospects.
- b. Begin running prospecting events and activities in your community.