



GENISTAR
Financial Freedom For All

BUSINESS BASICS

PART 1: *LAY THE FOUNDATION*



FAST TRACK

NAME:

Workbook

CODE:



WELCOME

FROM GENISTAR CEO, JEFF LESTZ

A sincere and warm welcome to the Genistar family.

Congratulations on your decision to become a Genistar Representative. This workbook will help guide you through your next steps.

In 2007 Genistar was founded with the mission of helping people become financially independent. We developed our unique business model to enable average and ordinary people to do something extraordinary.

I started in the business as a Representative, and I was so excited to learn 'how money works' and then to share this knowledge with my family, friends and community. I was even more excited to find out that I could make a great part-time income, get promoted quickly, and eventually go full-time and be my own boss.

If you have the desire to win, Genistar has the system to make your dreams and goals come true. I can GUARANTEE success IF you work hard and follow the success system laid out for you in this workbook. Stay coachable and listen to your upline leaders as they guide you to success. The beauty of our business is that when you win, everyone wins: you, your client, your leaders and the company. Are you ready for a brighter, more successful future?

Learn and follow the system and you can have success beyond your wildest dreams.

Welcome to Genistar.

Here's a welcome video:

<https://vimeo.com/801175223>

FOLLOW THE SYSTEM
Save Yourself Stress
Time, Energy and Money

Yours in Success,
Jeff Lestz, Co-CEO

WORKBOOK CONTENTS

Click on the titles below to go to the page.

Watch this video and learn how to use this workbook: <https://youtu.be/LWqprFRo4ow>

Watch this video to learn the Business Overview: <https://youtu.be/sYVUkvaioxw>

PART 1: LAY THE FOUNDATION

- 01** Dream It, Plan It, Do it
- 02** Success Ladder
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The background features several overlapping, wavy, organic shapes in various shades of green, ranging from a light, almost white green to a darker, forest green. These shapes create a sense of movement and depth, framing the central text.

PART 1: ***LAY YOUR FOUNDATION***

[\(Click here for Contents Page\)](#)

DREAM IT PLAN IT DO IT

By joining our team, you've shown that you're committed to being a success, and your success is important to us. This booklet has been specifically developed just for you — the new member. The concepts and guidelines you'll find throughout this booklet have been designed to get your new business on the fast track.

At Genistar, we believe that you can achieve your dreams. Our time-tested, proven system has helped train thousands of new leaders on how to get their businesses started. We believe that to be successful all you need to do is follow these simple steps contained in this workbook.

For more information about our company: who we are, our mission, our history and future, visit www.genistar.co.uk. As soon as you receive your username and password you can log in to this site and access all the information you need to help build your business. But don't wait until then – begin working with your upline now!

Genistar's training consists of field activity and classroom training. One hour in the field with a real client is equal to 20 hours of classroom training. There is nothing like practical experience.

IMPORTANT INFORMATION:

Upline Name: _____

Upline Code: _____

Upline Email Address: _____

Upline Mobile No.: _____

EVP Name: _____

EVP Code: _____

EVP Email Address: _____

EVP Mobile No.: _____

Weekly Overview Details: _____

Baseshop Training Details: _____

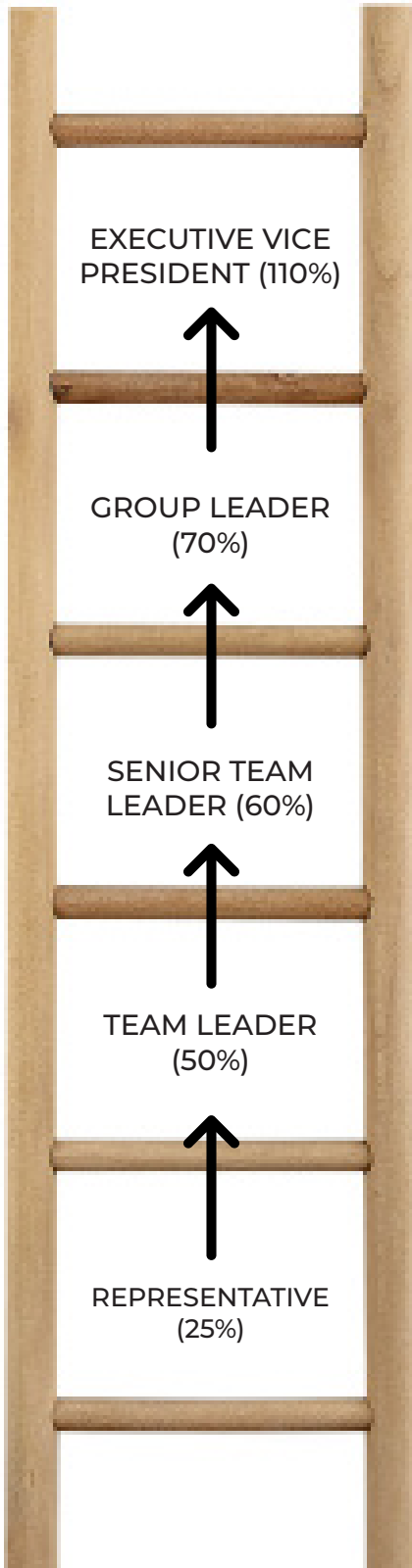
Field Support Centre: Genistar Limited, Victoria House, Harestone Valley Road, CR3 6HY

MY 30 DAY GOAL IS....

MY 90 DAY GOAL IS....

SUCCESS LADDER

*Promote Yourself to Executive Vice President
Start at Representative and work your way up!*



EXECUTIVE VICE PRESIDENT (110%)

Be full time. Have over 90% persistency. Have an acceptable financial situation. Provide upline EVP with an acceptable, qualified Management Exchange.
Have 4 TLs and 2 STLs. Have 10x10 - Team submits over £10,000 in annualised premium and have 10 IBAs (approved by the FSC) per month for two consecutive months.
No more than 50% from one leg will count.

GROUP LEADER (70%)

Produce two more Team Leaders (total of 4 Team Leaders) direct to you.
Team submits over £7,500 in annualised premium in one month.

SENIOR TEAM LEADER (60%)

Produce two Team Leaders direct to you.
Team submits over £3,900 in annualised premium in one month.

TEAM LEADER (50%)

Have three personal recruits.
Personally submit over £1,500 in annualised premium in one month.

REPRESENTATIVE (25%)

Submit IBA with £140.
Complete the assessments & be signed off as competent by your supervisor.
All monthly totals must appear on the website after the close of business for the month of promotion.

*Promotions only go through at the end of the month and are reflected at the beginning of next month.
Only one promotion per month is permitted.
Maximum of £650 per policy counts for promotion.*



COMPLETE YOUR IBA



BEGIN TO BUILD YOUR BUSINESS

Introduce 3 hard-working ambitious people to your EVP

- ★ Married
- ★ Has Kids
- ★ Homeowner
- ★ Employed
- ★ Age 25-55

Name: _____ Mobile: _____

Name: _____ Mobile: _____

Name: _____ Mobile: _____



GET YOUR OWN FINANCIAL FREEDOM PLAN STARTED

Schedule your own personal Financial Game Plan appointment with your partner and your trainer on:

Date: _____ Time: _____



ATTEND ORIENTATION CLASS



OBSERVE 2 FINANCIAL GAME PLANS

1. _____
2. _____



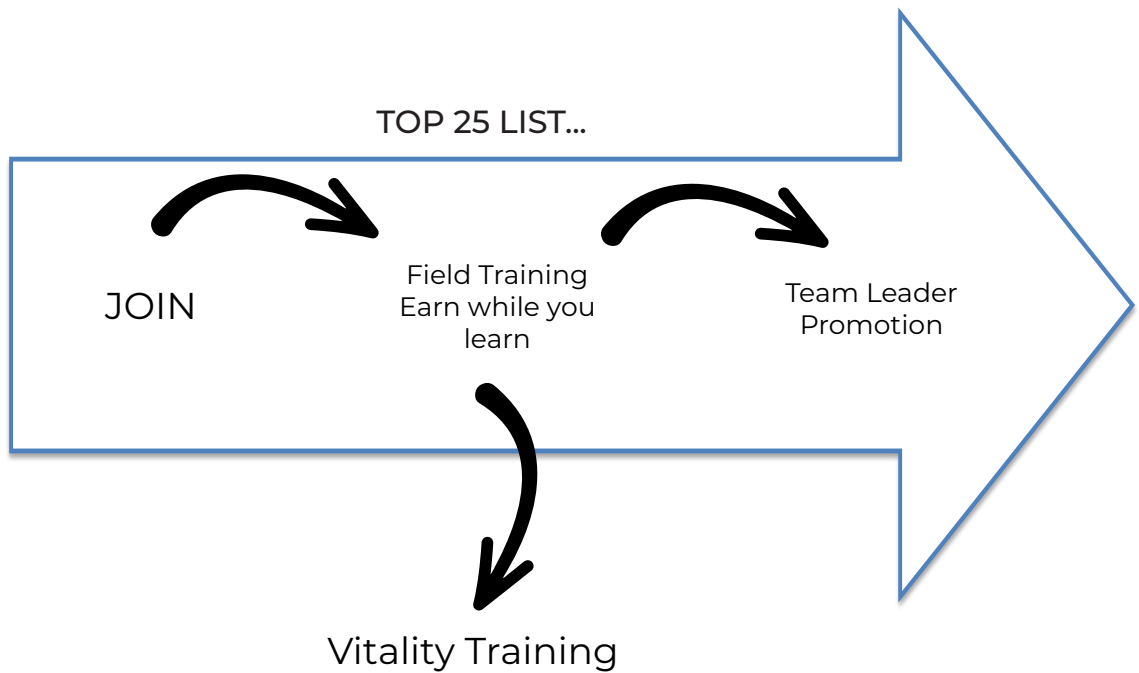
TAKE AND PASS YOUR EXAM ROLE PLAY WITH YOUR FIELD TRAINER



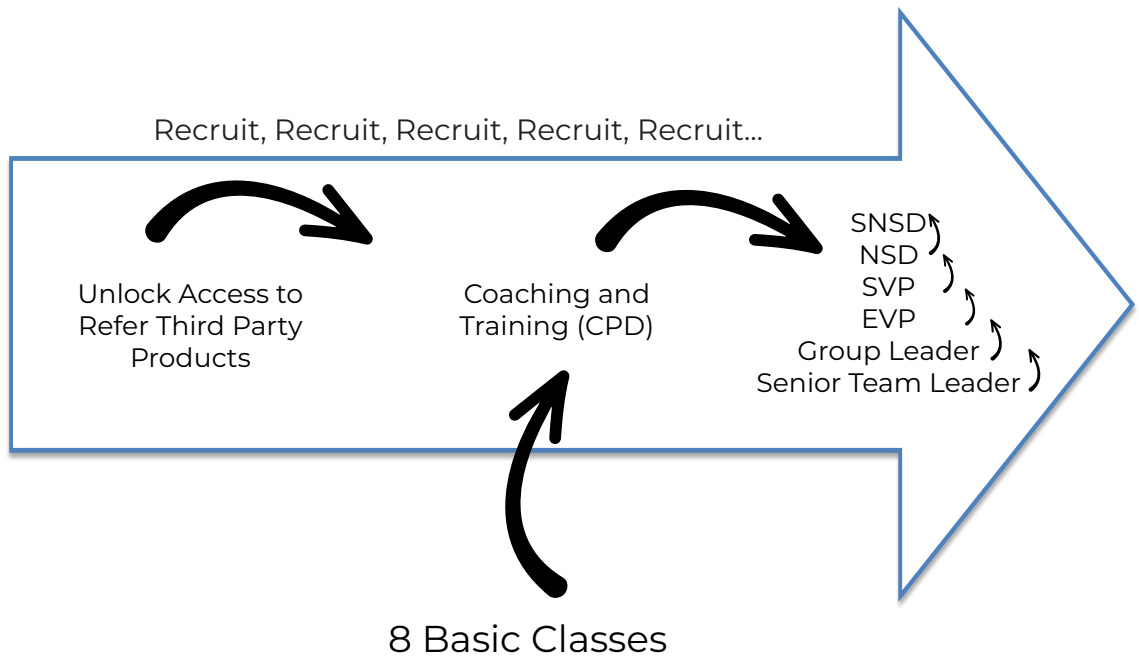
EXPLODE YOUR BUSINESS!

PATHWAY TO TEAM LEADER

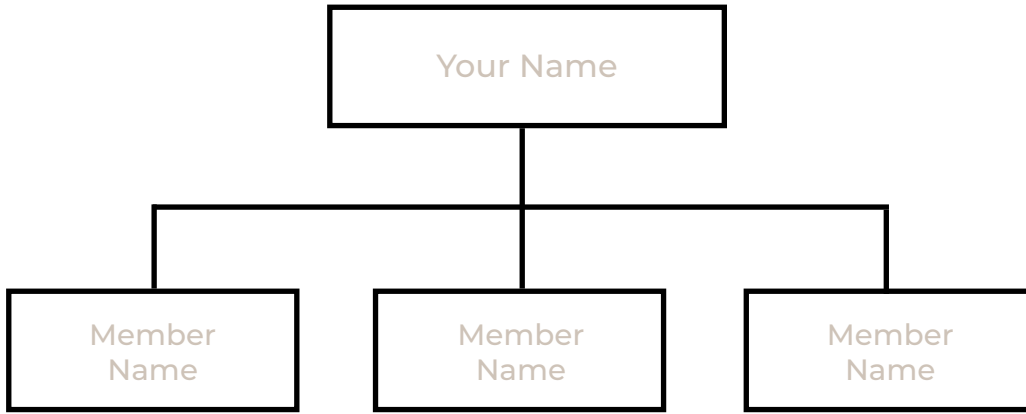
Get to Team Leader in 30 days...



When you reach Team Leader you unlock the next stage...



**TEAM LEADER IN 30 DAYS
LAUNCHES YOUR BUSINESS!**



GETTING MEMBERS

The average number of guests that you have each week at an overview meeting will usually equal the number of IBAs that you take in a month.

For e.g. if you get 12 people to say YES they are willing to attend each week, usually 3 will show up and 1 will join.

When you know these numbers it's easy to plan your recruiting.

Watch this video on Becoming a Team Leader: <https://youtu.be/LaLgGrXpWjY>

GETTING THE £1500 PREMIUM

You need to submit £1500 (or £125 per month) of annual premium in one month to qualify for the premium part of your Team Leader promotion.

It is important that you submit more than that as there can sometimes be bounce backs from the file checking, particularly if it's submitted near the end of the business month.

A good rule of thumb is to submit £2000 to ensure that £1500 goes through.

On average, in the right market, this will usually equate to taking on 2/3 families in a month, or less than 1 family per week.

CHECKLIST

- Recruit 3 New Team Members
- Submit £1500 (or £125 per month) of personal annualised premium in one month that goes through
- Go-Getter Award (both of the above completed in the same month)

RECRUITING SCRIPT FOR BUSINESS OVERVIEW VIDEO

1. Recruit says to friend:

Hi I have just gone into Business with _____ and he/she is here with me right now. I'm passing you over. I think you and he/she will get on.

2. 'Recruit and I were chatting the other day and I asked her who she knew that good with people and liked helping people, and your name came up in conversation. I dont know if you are open to anything new right now, however, I am looking for a few people who would like to teach a financial education programme online from home, and part time typically working 1 or 2 evenings a week and earning £1k - £2k per month.'

3. 'If you have an interest, all I would like to do at this point is send you a Youtube video. Its only 10 minutes long and if you like the contents, we can chat in more detail at a later date.'

4. YES - 'I'll send the video on WhatsApp, can you it watch by lunchtime tomorrow? I can call you just for 5 minutes between 12-2pm tomorrow. If you like what you have heard, we will set up a follow up meeting to get all your questions answered by my Executive Vice President.'

5. Send video + Trustpilot link + a message saying 'Nice chatting to you, take a look. It's only 10 mins. long. Speak tomorrow between 12-2pm. Regards ____ (your name).'

TEXT TEMPLATE

'Hi (Person's Name), I hope you're doing well. I recently met with a business leader called (Upline's Name) who is also a Financial Coach.

He shared some financial concepts with us which helped us make some informed decisions that I found very helpful and prudent.

Is it ok if I get him to give you a call ?

Thanks'

RECRUITING TEXT TEMPLATE

Hi (Person's Name),

..... has asked me to text you. I have recently shown him/her some ideas on how to make and save some money and he/she has asked me to show you the very same thing and to get in touch with you. Please take my call in the next few days and I will give you the details.

Regards (your name).

GLOSSARY

Baseshop	EVP Team to which you belong
Blue Vase	Award for attaining Go-Getter three consecutive months
Boot Camp	Intensive Skill-Based Training
Carryback	Follow up meeting with client where you present their financial plan and review solutions if applicable
CCMP	Clear Concise Mental Picture
Compliance	Department responsible for overseeing legal aspects of Genistar's business
CTP	Coffee Table Presentation - When you sit with someone to show them the business (not a scoop)
EVP	Executive Vice President
FGP	Financial Game Plan
Fact Find	Financial Game Plan data collection
Field Training	The process of learning by observing real clients' live presentations with a licenced trainer/representative
FCA	Financial Conduct Authority
FSC	Field Support Centre
FSS	Fast Start School (periodic school for the whole company)
Go-Getter	Award for attaining 3 personal recruits and £1500 submitted life business in one month. (Maximum £650 per policy counts.)
Hierarchy	An EVPs Team
IBA	Independent Business Application
IDD	Initial Disclosure Document
KTP	Kitchen Table Presentation
NSD	National Sales Director - A level above the Senior Vice President
Power Hour	An hour focused on calling contacts
Scoop	Initial meeting with the clients
SVP	Senior Vice President - A level above Executive Vice President
SNSD	Senior National Sales Director - A level above National Sales Director
Upline	The person or people directly above you in the hierarchy
WFA	Wait for Answer
72 Hr Interview	Follow up interview for prospective recruit which ideally happens within 72-hours or less of seeing a business overview

REMEMBER: The only silly question is the one you don't ask.
If a term you are looking for isn't here then ASK your upline or check the
Resources tab on genistar.online.

GENISTAR POLICIES

At Genistar we have a duty to ensure that how we behave and what we do in our business dealings with clients, customers, third parties and each other, complies with the Equality Act 2010 at all times. Genistar has a zero tolerance approach to any acts or behaviour that breaches these policies.

Equal Opportunities

Genistar is committed to promoting equal opportunities throughout the company. You, any job applicant, contractor or client will receive equal treatment regardless of age, disability, gender reassignment, marital or civil partner status, pregnancy or maternity, race, colour, nationality, ethnic or national origin, religion or belief, sex or sexual orientation (known as: Protected Characteristics).

Harassment

Harassment occurs when unwanted behaviour relating to a protected characteristic has the purpose or effect of violating someone's dignity or creates an intimidating, hostile, degrading, humiliating or offensive environment for them.

Examples of Harassment: Teasing someone about their age, sexuality or ethnicity. Making unwanted sexual advances.

Please note: The word 'unwanted' means 'unwelcome' or 'uninvited'. It is not necessary for the individual to say that they object to the behaviour for it to be unwanted. You can complain of behaviour that you find offensive even if it is not directed at you, and the complainant need not possess the relevant characteristic themselves.

Victimisation

Treating someone unfairly because they have made (or you believe they are about to make) an allegation/complaint about discrimination or harassment or they have provided evidence in support of a complaint about discrimination or harassment.

Examples of Victimisation:

A professor shouting at a student because he thinks she has the intention to support another student's sexual harassment complaint. Your employer dismissed you because of your disability. You have started tribunal proceedings under the Equality Act and now your employer has provided you with a bad reference, and you believe it is because you have taken action about discrimination. Beginning tribunal proceedings is a protected act, so this could be victimisation.

All Genistar Representatives are required to complete mandatory training on Equal Opportunities and Harassment. For more information and to read our Company Policy Documents, please refer to the Resources tab on the website.

Recruiting code of conduct

As representatives of Genistar, we are all eager to build our teams and be successful. This is the best way of thinking, however, this comes with some boundaries. It is important to understand that there are two dynamics at play. At Genistar we want to develop a culture that has both a sense of urgency and also a spirit of cooperation and fair play.

As we grow, we will continually encounter situations where a prospective recruit is contacted by different people on various teams. We must always remember that, as leaders, how we handle such situations and our attitudes will be mimicked by our team and will be judged by the public.

At Genistar we follow guidelines that help us to build one of the best companies in the UK. If you follow these basic business principles you will build a team with integrity! For more information please read our policy online under the Resources tab.

 020 3372 5085

 <https://genistar.online/>

 <https://genistar.online/contact>

FCA - 11 PRINCIPLES

Genistar abides by the FCA's (Financial Conduct Authority) 11 principles for businesses.

1: Integrity

A firm must conduct its business with integrity.

2: Skill, care and diligence

A firm must conduct its business with due skill, care and diligence.

3: Management and control

A firm must take reasonable care to organise and control its affairs responsibly and effectively.

4: Financial prudence

A firm must maintain adequate financial resources.

5: Market conduct

A firm must observe proper standards of market conduct.

6: Customers' interests

A firm must pay due regard to the interests of its customers and treat them fairly.

7: Communications with clients

A firm must pay due regard to the information needs of its clients, and communicate information to them in a way which is clear, fair and accurate.

8: Conflicts of interest

A firm must manage conflicts of interest fairly, both between itself and its customers and between a customer and another client.

9: Customers: relationships of trust

A firm must take reasonable care to ensure the suitability of its advice and discretionary decisions for any customer who is entitled to rely upon its judgment.

10: Clients' assets

A firm must arrange adequate protection for clients' assets when it is responsible for them.

11: Relations with regulators

A firm must deal with its regulators in an open and cooperative way, and must disclose to the regulator appropriately anything relating to the firm of which that regulator would reasonably expect notice.



Write a review about Genistar on TrustPilot using the following link:
<https://uk.trustpilot.com/review/genistar.co.uk>

Note: Refrain from using your genistar.org email address as this does not work when writing about Genistar, please use a personal email address, thank you!



“I would highly recommend Genistar to anyone.

Genistar helped me understand how to make my money work for me, ...”

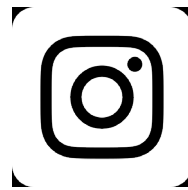
- Annabelle Sanchez



SCAN THE QR CODE AND FOLLOW US ON SOCIAL MEDIA!



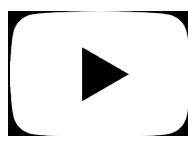
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