**60 – 90 Day Worldclass Checklist**

**To Become an EVP**

**Rep: 1St Upline: EVP:**

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|  | **MARKS OUT OF 10** | **NOTES**  |
| ① **Phone Calls/Scripts** |  |   |
| a) Third Party Referral  |  |  |
| b) Training Triangle  |  |  |
| c) Bring Appointments forward and over schedule |  |  |
| d) Practice Presentation  |  |  |
| e) Objection Handling  |  |  |
| f) Workbook scripts  |  |  |
| g) Trakka Box system in place(Manual CRM system) |  |  |
| h) 8/12 Power Hours a week |  |  |
| ② **Presentations**  |  |   |
| a) Introduction script  |  |  |
| b) 2 Steam Leads  |  |  |
| c) Enthusiastic Presentations  |  |  |
| d) Hot Button (Number 1 goal from the questions asked in the introduction script, that inspires the client.) |  |  |
| e) Building Rapport  |  |  |
| f) 2 Commitments  |  |  |
| ③ **Fact Find completion**  |  |  |
|  b) Soft Notes  |  |  |
| ④ **Answers to Objections**  |  |  |
| ⑤ **Third Party Referral Script**  |  |  |
| ⑥ **Referrals**  |  |  |
| 6a **Mortgage Capsule** |  |  |
| Transition  |  |   |
| a) Yellow Memory Jogger  |  |  |
| b) Steering towards 5\*  |  |  |
| c) 200 Total Referrals at all times |  |  |
|  d) Appointment Ratios  |  |   |
| ⑦ **Complete Online Life Application** |  |   |
| a) Underwriting requirements  |  |   |
| b) Non-Disclosure  |  |   |
| ⑧ **10 White referral Cards**  |  |  |
| a) Name  |  |   |
| b) Town  |  |   |
| c) Partner’s Name  |  |   |
| d) Hobbies  |  |   |
| e) Best Friends  |  |   |
| f) Ambitious  |  |   |
| g) Enthusiastic  |  |   |
| h) Day Time  |  |   |
|  i) Top 2 highest Income Earners |  |  |
|  j) Steam  |  |   |
| k) 2 x Field Training  |  |   |
| ⑨ **Travel Double**  |  |   |
| ⑩ **Go Getter as Minimum** |  |  |
|  a) 3 Recruits  |  |   |
|  b) £3,000 of Premium  |  |   |
| 11 **Accountability**  |  |   |
| 12 **Learn the Business Overview Meeting &** **Follow up Interview**  |  |   |

**NOTES:**

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