**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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