

GENISTAR
Financial Freedom For All

Welcome to the Genistar Journey

Representative

Congratulations on becoming a licensed Representative!
This marks an exciting new chapter in your Genistar journey.



You’re now fully equipped to serve your clients, build your team and grow your business. This is where your hard work starts to pay off, and you can truly make an impact on people’s financial lives.

What we will explore:

Objectives	**Action Steps for Success**
Responsibilities	**Soft Skills for Progression**

What is an excellent representative?

Dolly Bright



Advice from Dolly:

- Lead yourself by becoming a client and having a financial plan.
- Focus on recruiting, aiming for one new person per week.
- Get licensed and learn the business system thoroughly.
- Aim for quick promotions, starting with Team Leader in 30 days.
- Always prioritise making money and show others how to do the same.



Objectives

As a Genistar representative, your primary objectives are to build relationships with new clients and recruits. This dual focus is crucial for growing both your client base and your team.

Responsibilities

Your core responsibility is now to represent and embody the company’s vision, values, and mission in every interaction.

Utilise the system and our resources to build strong client and team relationships.

A professional approach not only ensures compliance but also builds trust and credibility with your people.



Action Steps For
SUCCESS

Your success now depends on balancing client service with team growth.

These action steps focus on expanding your team, perfecting your communication skills, and deepening your understanding of financial products and services.

By mastering these points you'll not only serve your clients more effectively but also build a strong foundation for your growing business.

- [ ] Build your team of 3 or more members
- [ ] Master all scripts for client interactions and recruitment
- [ ] Develop proficiency in making independent phone and video calls
- [ ] Learn to present the Financial Plan, including 1st & 2nd appointments
- [ ] Understand and master Vitality's protection options
- [ ] Learn to prequalify referrals for other financial services (mortgages, etc.)
- [ ] Learn to teach the Genistar system you have learnt to new Associates

Soft Skills for Transitioning to Team Leader:

- [ ] Build strong self-discipline by consistently achieving personal and performance goals
- [ ] Learn how to communicate clearly with clients and team members
- [ ] Maintain a positive attitude in the face of challenges
- [ ] Manage your diary and schedule meetings effectively

BUILD YOUR TEAM

You need 3 or more team members

The 3rd Party Referral System



The 3rd Party Referral System is a simple approach to getting and managing referrals. It works by using your current connections to reach out to potential clients and recruits through people they know and trust.

Watch the video to learn how it works.

By using the 3rd Party Referral System, your existing clients and recruits can help you grow your business, and you will never run out of people to see.

- [ ] I've watched and studied the 3rd Party Referral System video

- [ ] BUILD YOUR TEAM Action steps complete

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MASTER THE SCRIPTS

For client interactions and recruitment

Dedicating time to master all scripts for client interactions and recruitment is the best way to ensure clear, confident communication.

Practice the scripts by role playing with a teammate or your EVP so you can develop your proficiency and start making independent calls. These scripts will help you build relationships by adding value to others' lives.

Download Workbook

Conversation Skills Training Videos







MASTER THE SCRIPTS
Action steps complete

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DEVELOP PROFICIENCY

In making independent calls

The goal of mastering the scripts is to develop proficiency in making independent phone and video calls as it is crucial for your success.

This Client Materials page provides you with a wealth of materials to enhance your client interactions and boost your confidence.

Discover the presentations, engaging videos and brochures, to learn how to deliver an exceptional service every time.

Client materials

Conversation Skills Training Videos



Importance of Conference Calls



Making Phone Calls



Overcoming the Fear of Phone and Conference Calls



The ABCs of Making Phone Calls

DEVELOP PROFICIENCY
Action steps complete

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PRESENTING

The financial plan, 1st and 2nd appointments

Going through the presentations with your EVP or trainer and getting your own Financial Plan in place is the best way to learn how the process works.

Learning to present the financial education presentation and the Financial Plan is critical to running your business as a Genistar representative.

Focus on your presentation skills, efficiently processing the Fact Find and translating it into a clear, actionable plan.

Fact Find form

Presentation training videos



First appointment with a client



Second appointment



Selling the Financial Plan

PRESENTING
Action steps complete

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UNDERSTAND & MASTER

Vitality’s Protection Options

Vitality is our main protection product provider. They offer a range of essential products to help families provide for their current and future needs.

Familiarise yourself with their valuable suite of options. Your Field Trainer can guide you as to which products you should start with.

By thoroughly grasping the key features and benefits of each product, you’ll be well-equipped to educate your clients.

Vitality Client Engagement

Vitality training videos



Vitality Introduction



The Vitality Programme

UNDERSTAND AND MASTER
Action steps complete

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PREQUALIFY REFERRALS

for other financial services

This process is all about asking the right questions to identify your client's needs and potential opportunities for additional services beyond protection products.

By mastering this skill, you'll be able to provide better holistic financial solutions to your clients while potentially increasing your income.

Focus on developing a keen understanding of your client's current situation.

Genistar Success System

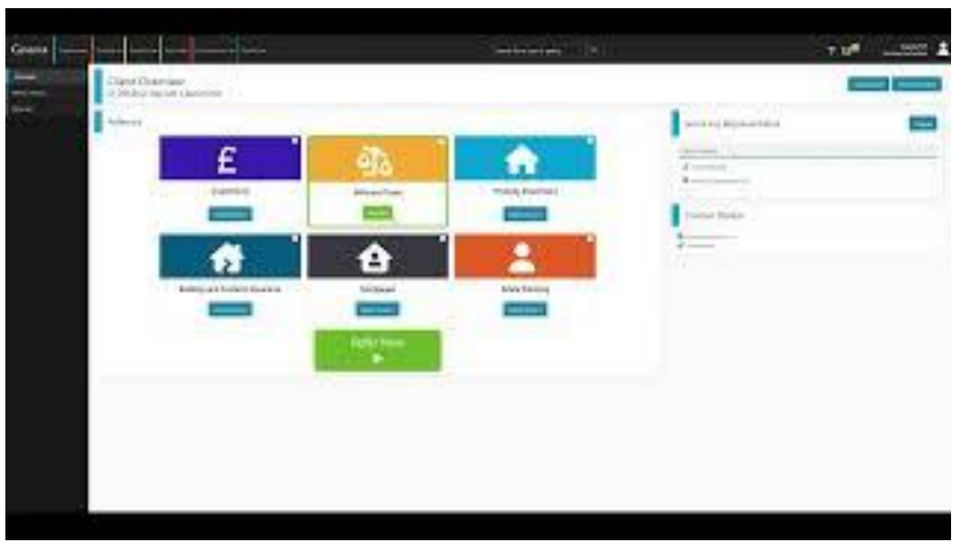
Referrals Training Videos



Presentation Introduction



What is a Good Referral?



How to Submit a Mortgage Referral



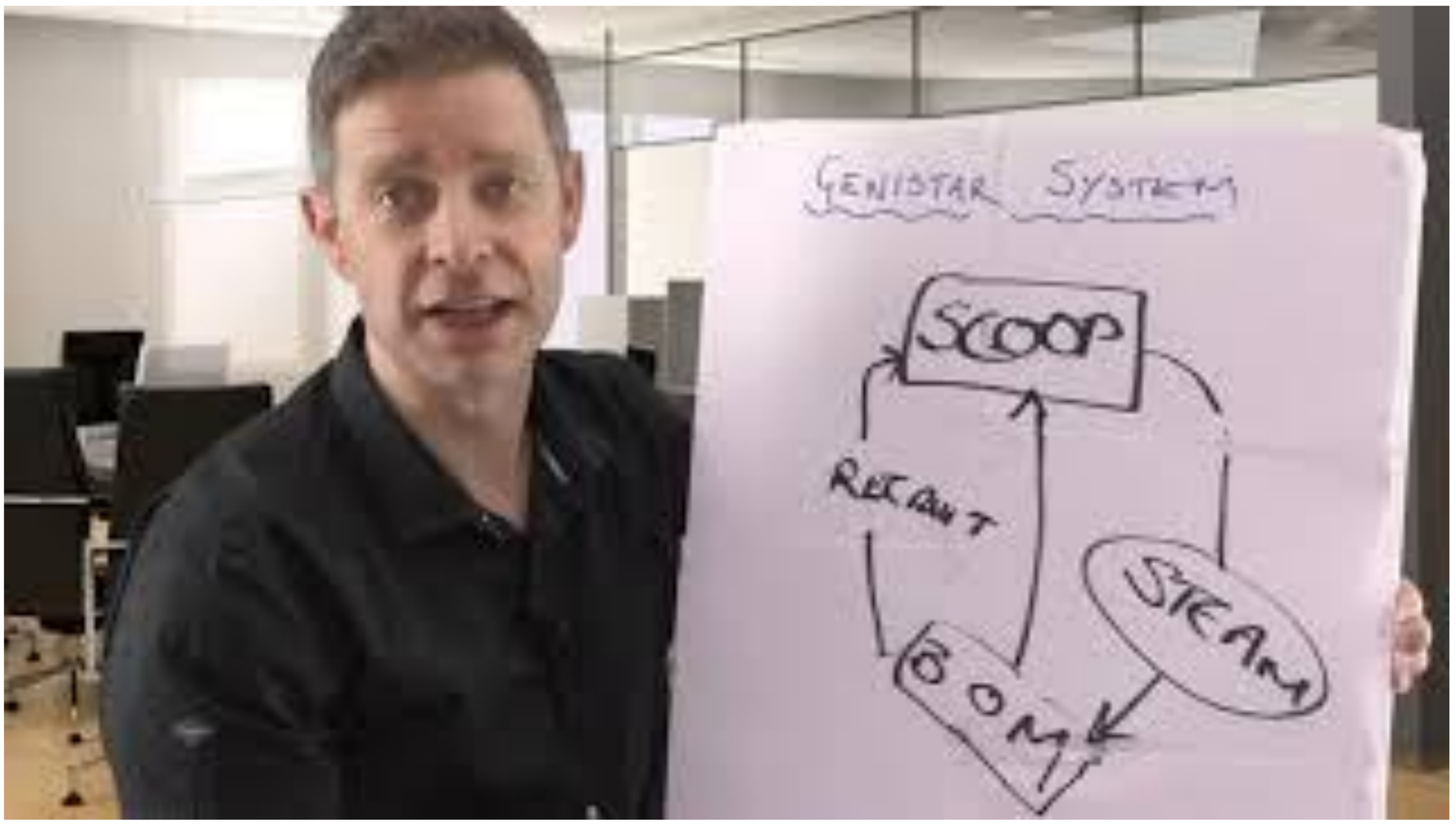
Filtering Your Referrals

PREQUALIFY REFERRALS
Action steps complete

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THE GENISTAR SYSTEM

Master this so you can teach it to others and build your team



The Genistar System is designed to transform financial lives, including your own.

By mastering this system, you'll gain crucial knowledge about financial planning and wealth creation, while developing the skills to guide others towards financial success.

As you delve deeper into the system's intricacies, you'll find your own financial acumen growing, opening up new perspectives. This expertise becomes a valuable asset, enabling you to make a tangible impact on people's financial well-being while advancing your own career.

Teaching the Genistar System to others goes beyond mere information sharing—it initiates a ripple effect of financial literacy that can positively influence families and communities.

Learn More

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TEACH WHAT YOU'VE LEARNT

Learn to teach the Genistar system to new associates on your team

Have you heard the saying, "The teacher always learns more than the student when teaching"?

Learning to teach the Genistar system to others is not just a skill—it's your gateway to becoming a true leader and mentor to help other people.

As you master the art of teaching, you'll find that your own understanding deepens exponentially.

Genistar success system

Videos explaining the foundation



The Story Behind the System



Your WHY and CCMP



The BIG Picture



Teaching Vitality on the 2nd Appointment

TEACH WHAT YOU'VE LEARNT
Action steps complete

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SOFT SKILLS

Developing strong interpersonal skills

These soft skills are the invisible threads that weave together your professional relationships, client interactions, and team dynamics.

You will accelerate your business by working on yourself and acquiring the ability to communicate effectively, empathise with clients, and maintain a positive attitude in the face of challenges.



Attitude and Learning with Gareth Morgan

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DISCIPLINE AND CONSISTENCY

Don’t just dream but achieve your goals!

As a Representative, you’re now in charge of your own income.

Your ability to set clear, achievable goals and consistently meet them will directly impact every area of your life.

Start by establishing both short-term and long-term objectives with your EVP or field trainer so you know what to do each step of the way.

Videos about discipline



Habits Maketh The Man



Accountability

DISCIPLINE & CONSISTENCY
Action steps complete

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COMMUNICATE CLEARLY

Mastering the art of communication

The ability to articulate ideas effectively to both clients and team members can significantly impact your business growth and professional relationships.

When you can explain complex concepts in simple, relatable terms, you build trust with clients and increase the likelihood of building a relationship.

Practice the conversations to make your presentation clear and easy to digest.

Genistar success system

Learn from John Maxwell



Improve Your Communication Skills with This!

ARTICULATE CLEARLY
Action steps complete

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A POSITIVE ATTITUDE

In good and challenging times

One of the most powerful ways to maintain a positive attitude is to reframe challenges as opportunities for growth. Instead of viewing obstacles as insurmountable problems, try to see them as chances to learn, improve, and become more resilient.

Instead of dwelling on failures, try to extract valuable lessons from them. Analyse what went wrong and determine how you can improve next time. This approach turns setbacks into stepping stones for future success.

90% of success is attitude



Learn how to develop and maintain a positive mindset with our national sales director Steve Jenkins

TIME MANAGEMENT

Manage your diary and meetings

Effective time management is crucial for success, as you are working part-time and want to maximise your productivity while balancing work and personal commitments.

Start by prioritising your tasks. Get with your EVP or Field Trainer and create a clear plan for time to invest in building your business.

Maintain open lines of communication with your EVP, team and clients. Be clear about your part-time schedule and availability to set realistic expectations



Learn about the 9 Fs from Dolly in this video

TIME MANAGEMENT
Action steps complete

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