

GENISTAR
Financial Freedom For All

EVP Accelerator Course

Workbook · 13–14 November 2026

WORKBOOK

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BEFORE
We Start

**“It doesn’t take long to learn all of this.
However, it can take a long time to decide to learn it all.”**

Everything you need to become an EVP is in this workbook — the system, the scripts, the numbers and the plan. The only thing it can’t give you is the decision. Keep it after the course: it is your playbook as an EVP — and the guide you will hand to the Group Leaders you develop next.

MY DECISION

I have decided to learn it all, and to become an EVP by _____ .

Signed _____ **Date** _____

OBJECTIVE
Of the Course

At the end of these two days, we want you to leave reinvigorated, equipped with the tools, mindset and belief to become an Executive Vice President with Genistar. Our aim is to guide you to become an independent business person with ownership, to leave a legacy for your future generations and to help make Genistar a household name in financial education.

We follow nine steps to your next promotion, with the Third Party Referral System as the engine that powers every one of them.

GROUND RULES

- This workbook needs your continuous input and concentration for the next two days.
- Write your questions and statements down in the spaces provided at the end of each section.

Signed Agreement

I am determined to get the most out of these two days, which I have invested time, effort and money into.

I agree to avoid reading emails and texts, and doing any file checking or quotes during sessions. I will fully engage and concentrate 100% on the material I will be learning.

Signed *(type your name here as a digital signature)* _____

Date _____

WELCOME

You're a Special Group

"Many people say they want to be financially independent, but they're not here."

Let's review the way the process thins the ranks.



Coming to the EVP Accelerator Course makes you very special!

Notes...

MY
Why

Your why is the reason you'll make the call on a cold Wednesday night when nobody is watching. Make it specific, make it personal — and make it big enough.

Why did I join Genistar?

Why do I want to become an EVP — and why now?

Who am I doing this for?

What will be different for my family when I get there?

What will it cost me if I don't?

MY WHY IN ONE SENTENCE

YOUR TWO DAYS

The Nine Steps to EVP

DAY 1 — FRIDAY 13 NOVEMBER · KNOW YOUR ROAD

09:00	Opening: decide to learn it all · a special group · my why
09:50	Step 1 — Create Your Roadmap
10:35	Break
10:50	Step 2 — Do the Maths
11:50	Step 3 — Hardest Part First: the Scoop & the DIME
12:55	Lunch
13:40	Step 3 — the Carryback Close & practice presentations
14:55	Break
15:10	Step 4 — Set an Outrageous Promotion Date
15:45	Step 5 — Do the Thing AI Cannot: welcome, F.O.R.M., my story
17:00	Day 1 commitments & tonight's homework
17:30	Close

DAY 2 — SATURDAY 14 NOVEMBER · MAKE THE MOVE

09:00	Check-in: last night's welcome calls and sticky notes
09:15	Step 6 — Widen Your Reach: engines, sweet spot, referrals & the Green Card
10:45	Break
11:00	Step 6 — Phone scripts: booking & recruiting
12:10	Lunch
12:50	Step 7 — Create Momentum: the training triangle
13:50	Step 8 — Running Mates: MECCAH, GROW & Management Exchange
15:10	Break
15:20	Step 9 — Keep Yourself on Track: rhythm & recognition
16:10	Rise Above — your 12-month EVP plan
17:00	Commissioning
17:30	Close

STEP 1
Create Your Roadmap

What does your team actually look like today — and what has to be true for you to reach EVP?

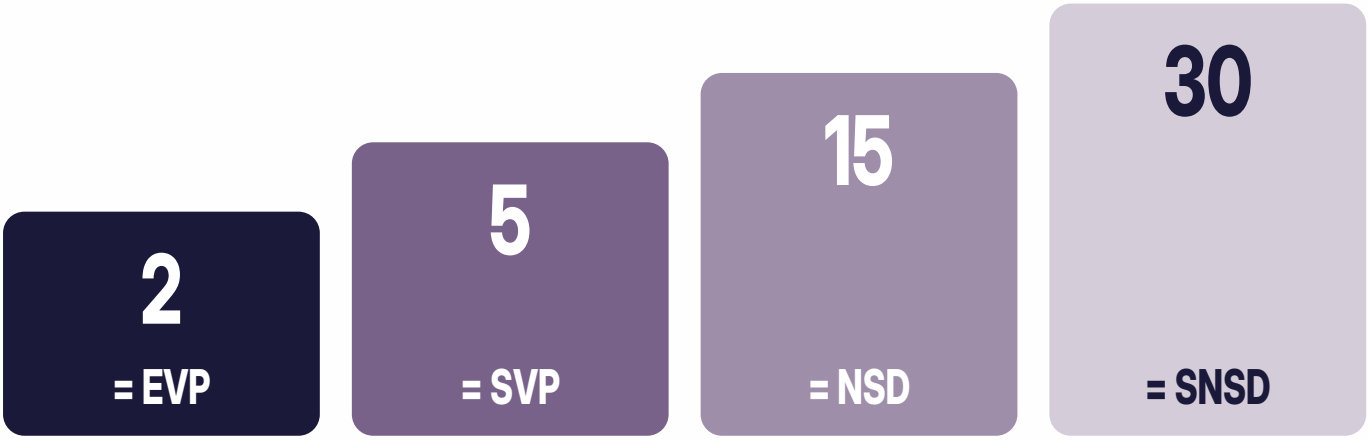
ONE SYSTEM FOR THE WHOLE TEAM

The third party referral system is a R_____ S_____ not a S_____ S_____ and yet, if followed completely and precisely, it will yield 1000s of sales per year for you.

This workbook is your template to easily T_____ a complete system downline, so your business will D_____ and your income will C_____.

Imagine having a hierarchy of 30–40 EVPs all on the same system, allowing your business to multiply even when you're not there.

I declare that I'm going to train _____ people in my team to be on this system.



What the numbers mean: how many people you need fully trained on this system at each rank — **2 to become an EVP**, 5 for SVP, 15 for NSD and 30 for SNSD.

Write your questions down at the end of each section in the space provided.

4 PRIORITIES
Of the Business

1. **Always make money**
2. **Develop 7–10 key leaders**
3. **Law of large numbers in the shortest possible time**
4. **Follow a system whereby recruiting never stops**

Watch: youtu.be/lwwBKujS0-M

Notes...

WORKSHEET 1

My Team Today

Facts, not hopes. Not what Sally told you she was going to do — what your team actually looks like right now. Use your back office for the real numbers.

ME — name & rank

_____

LEG A

Leader

Rank

Licensed? (Y/N)

FGPs, last 90 days

Recruits, last 90 days

Active, last 30 days? (Y/N)

Key people in this leg

LEG B

Leader

Rank

Licensed? (Y/N)

FGPs, last 90 days

Recruits, last 90 days

Active, last 30 days? (Y/N)

Key people in this leg

LEG C

Leader

Rank

Licensed? (Y/N)

FGPs, last 90 days

Recruits, last 90 days

Active, last 30 days? (Y/N)

Key people in this leg

WORKSHEET 1

My EVP Gap

EVP qualifications: 6 directs (2 Senior Team Leaders and 4 Team Leaders) · 10x10 for 2 months in a row (multiple 10x10s if you want to come out strong) · an acceptable management exchange. Fill in **Me today** honestly — if you don't know a number, write a question mark. The gap column becomes your Step 2 maths.

EVP requirement	Required	Me today	Gap
Direct Senior Team Leaders	2		
Direct Team Leaders	4		
Team premium per month (10x10)	£10,000		
Approved IBAs per month (10x10)	10		
Months in a row at 10x10	2		
Acceptable management exchange	Agreed		

My biggest gap is: _____

What I need to find out on Monday: _____

Notes...

STEP 2
Do the Maths

Not good intentions. The activity your target actually requires — and whether it is realistic.

£1,000	£1,100	£825	£275
average annual premium (AP)	commission at 110% of AP	advance (75%)	trail over time (25%)

THE FUNNEL: 10 : 5 : 3 : 2

Every **10** first appointments booked → **5** held → **3** Financial Game Plans → **2** policies. One block of ten bookings = £2,000 AP and £2,200 commission. You don't control who says yes — you control how many appointments you book.

YOUR WEEKLY RHYTHM

	Booked	Held	FGPs	Closed
£50k — per week	5	3	2	1
£50k — per month	19	10	6	4
£100k — per week	9	5	3	2
£100k — per month	38	19	12	8

TEAM MATHS: 10 IBAS A MONTH

2–3 a week · about 1 every other working day. Proposed mix: home-based BOMs 5 · in-person BOM 3 · Lestz Talk Money 1 · Naxum online BOMs 1. Weekly numbers above are rounded up.

Illustrative planning figures from the EVP Activity Model — personal production only; team overrides come on top. Not a guarantee of earnings.

SCIENTIFIC
Principle

There is a scientific principle called **Stumble Forward**.

» _____ hour in the F_____ is better than 20 hours in the C_____.

» _____ clients taken on you get C_____.

» _____ clients means you have S_____ I_____ A_____.

» Before you can be G_____,

» you have to be B_____.

» Before you can be B_____ you have to T_____.

Notes...

WORKSHEET 2
My Numbers

Take your gap from Worksheet 1, divide it by the months to your date, and turn it into a weekly number.

My EVP gap (from Worksheet 1): _____

Months to my target date: _____

Recruits needed per month: _____

FGPs needed per week: _____

Appointments to book per week (FGPs × 10 ÷ 3): _____

IBAs needed per week: _____

WHERE MY IBAS WILL COME FROM

Engine	IBAs per month	Who books them
Home-based BOMs		
In-person BOM		
Lestz Talk Money		
Naxum online BOMs		
WhatsApp status change		
One-to-one presentations		
Referrals (Third Party Referral System)		
Scoops		

MY ONE WEEKLY NUMBER

_____

STEP 3
Tackle the Hardest Part First

Go where the work is — not where the warm feeling is. Successful people and unsuccessful people dislike the same things; successful people do them anyway.

Where the hard part usually hides: licensing · your weakest leg · your own diary · sitting with clients and asking for the decision.

WORKSHEET 3 — MY HARD PART

The one thing I have been avoiding:

My first action (within 48 hours): _____

Diarised for (day and time): _____

My buddy who will text me on Monday: _____

THE PART-TIME LEADER'S WEEK

Block	Suggested minimum	My fixed time
Power Hour	Daily, same time	
Appointment evenings	2 fixed evenings	
Recruiting event	1 a week	
Team and training	Saturday morning	
Plan and connect	Sunday call + Monday	

Notes...

THE SCOOP
The First Appointment

How long should it take? _____

Presentation Introduction Script — Follow the System Workbook. *Learn these off by heart so you can look at the client as you say them.*

AT THE DOOR / ONLINE: So, where do you know _____ (third party) from?

WHEN YOU FIRST SIT DOWN: By the way, what did _____ (third party) say that caused us to get together today/tonight?

WHEN READY TO START: Did _____ (third party) tell you what we were able to do for them? **WFA** (regardless of answer). They asked me to show you the very same thing I showed them, which was how to get their money working as hard for them as they work for themselves. There's no cost for this information so you can relax and take your hand off your wallet ... I won't be asking for any money today/tonight.

Maintain eye contact and say this slowly and sincerely: Well, just before we get started, let me ask you this if I may: Do you currently have some goals and dreams that would take a substantial amount of money that at the present pace is taking you too long to accumulate? **WFA**

Would you just share 1 or 2 of the most important ones with me? **WFA** *(If they give you a ridiculous one say: that would be a lot of fun but in the real world ... or as the first step ...)*

(Very slowly) Approximately, what would that one cost? **WFA**

(Calmly) How long at your present rate of income (plus any pay rises/bonuses) will it take to accumulate this money? In other words, when do you think you could get at least the first dream? **WFA** *(If the answer seems surprisingly soon ask how much have you accumulated so far toward that goal?)*

These are important to you and your family, aren't they _____?

So if you had a choice between never having these goals, taking far too long to achieve them, or having £_____ in the next few years — you'd prefer the next few years, wouldn't you? **WFA**

What I'm going to show you now is how there is a good possibility of you obtaining that money within the next 2 to 3 years. So, as I show you the same thing as I showed _____ (third party), I'd like you both to ask yourselves 2 questions:

1. Do you see the value of this financial education for you and for others, and ...
2. Do you see how this is easy enough to learn that you could do it too if you wanted?

START PRESENTATION

Notes...

THE SCOOP

Memorise It

» You must M_____ this so it comes across as N_____ — even on Z_____.

» This is a M_____ key to W_____.

» Who would like to recite it?

» The presentation is a R_____ presentation and not a S_____ presentation.

Watch: youtu.be/rQCxEvQfzBc

THE 2 MOST IMPORTANT PAGES OF THE PRESENTATION ARE

H_____ L_____ R_____ W_____

and T_____ T_____ C_____

Notes...

STEAM
Leads

Using the **Trustpilot** page in the presentation:

S **SALES**

T **TEACHER / TRAINER**

E **ENTHUSIASTIC**

A **AMBITIOUS**

M **MONEY MOTIVATED**

You only need to get 2 or 3 STEAM leads. Any more than that will hinder the rest of the process.

Notes...

THE FACT FIND

The DIME

"Do you feel like you have the right amount of cover, too much or too little?"

The computer will figure it out for us exactly, but let me teach you how you can work out approximately how much you need. Asking the DIME questions can help the family come to a decision.

> *"If you say it, they tend to doubt it. If they say it, they believe it to be true." — Tom Hopkins*

ASK THE QUESTIONS IN THE PROPER ORDER

1. **Mortgage**
2. **Debts**
3. **Income**
4. **Education and other expenses**

ASK THE SURVIVING SPOUSE ABOUT THEIR NEED AS A SURVIVOR

- Would you NEED to have the mortgage paid for if something happens to your husband?
- Would you NEED to have the mortgage paid for if something happens to your wife?
- I take it you would like your debts paid off also?
- Ask the surviving spouse: if your mortgage and debts were paid off, how much income would you earn, and how much income would you and your family NEED just to be comfortable? **WFA**
- If the same thing were to happen to you, how much income would you and your family need just to be comfortable?
- Ask them to use **THEIR** calculator and have **THEM** total the numbers.

NOW THEY HAVE WORKED OUT HOW MUCH THEY NEED!

Notes...

2ND APPOINTMENT
Carryback

How long should it take? _____

List the problems a LONG carryback will encounter:

1. _____
2. _____
3. _____
4. _____
5. _____

BE PREPARED

- 10–15 referral cards
- Memory Jogger ready to email / WhatsApp / have on screen
- Vitality quote pre-prepared
- Vitality brochures

Notes...

THIRD PARTY
Carryback Close

Remember: this ONLY works well with the front-end commitment on the SCOOP!
MEMORISE: 'Mr and Mrs Client, secondly we request that you recommend 10 people exactly like yourselves who ought to hear about our company and our concepts; they of course can make up their own mind. Fair enough?' **WFA**

CLOSING THE FGP CARRYBACK

1. **Review the presentation** — pausing on key pages such as How Life Really Works and the 2 Commitments (do these completely).
2. **Reconfirm the 2 Commitments** — commitment to do business and commitment for referrals.
3. **Review the Fact Find.**
4. **Present the Financial Game Plan.**
5. **Build a Vitality quote with your client.**
6. 'Mr and Mrs Client, what level of cover best suits your family's needs?'
7. **MEMORISE:** 'Mrs Client, what do you like best about your new plan?' **WFA** 'And Mr Client, what do you like best about your new plan?' **WFA** 'What made you choose the level of cover to protect your family?' **WFA** 'Aren't you glad (third party) asked us to get together?' **WFA** 'Remember you promised that you would recommend 10 people exactly like yourselves? My company has made it very simple for you with this yellow memory jogger: here's one for you, Mrs Client, and here's one for you, Mr Client. Who comes to mind first? Who do you work with?' *(Look down, pen ready to write, and keep quiet.)* **ONLY LIST REFERRAL NAMES FOR NOW.**
8. **Then complete the life application** — after the yellow Memory Jogger — also known as the electronic submission document (ESD).

Notes...

CARRYBACK CLOSE
Continued

9. **Complete referral cards at the end.** Qualify referrals and gather information. Ask: Best friend? Daytime? Has money? Most enthusiastic? Use I.S.T.E.A.M.
10. **Collect 3–5 STEAM leads.**
11. **Coach the clients on how to talk to the referral. MEMORISE:** 'Now, Mr and Mrs Client, sometimes after hearing from us, your friends might call you to get more information. We have found that certain words close minds while other words open minds. An example of the kinds of words that close minds are words like investments and insurance. If they believe we are trying to sell them something, we may not be able to make the appointment to see if we can truly help them. You could tell them it's completely different from anything you've ever seen and to just trust you — it's definitely worth taking the time to see for themselves.' *(Show them the script at the bottom of the Memory Jogger.)*

Notes...

PRACTICE
Presentation Script

For your new people. As a Group Leader you've done this — now use it to launch every new person while they get licensed. Coach them through the script, then follow up on their Client Assessment Surveys.

Follow the System Workbook. Your new person can practise this script with friends and family before they are licensed, but they **MAY NOT** complete the Fact Find.

Have your presentation ready. Remember … you are calling a friend. Keep it simple, ask for their help, set the appointment.

Hi _____, this is _____ (your name).

As you probably know, I recently became involved with a financial education company, Genistar, and I need to ask for your help.

I need some practice giving my presentation to people who will give me some honest feedback and score me. Would you do that for me? **WFA**

Great — if I book an online meeting / pop round on _____ evening, what time would be best for you, 7pm or 9pm? **WFA**

And _____ (partner) will be there too?

Thanks for your help, see you on _____ at _____ pm.

Possible objections you can overcome

What is it for? It's really just for me to prove to my trainer that I am competent, and I know you would give me honest feedback if there are areas I need to improve on.

Do I have to give you any personal information? All you have to do is listen and give me feedback on a form that I will bring with me.

Does it cost anything? It doesn't cost anything at all except your time, and it would really help me out.

Partner won't be there. Oh, I really need both of you to be there. As most of our clients are couples, it's important that I practise in our most common scenario. When would be a good time when both of you could help me? **WFA**

CLIENT ASSESSMENT
Survey Form

1. Give a practice presentation to a friend (not your partner). **2.** Ask them to complete a Client Assessment Survey.

Please read: Thank you for taking the time to help one of our new associates with this assignment! At Genistar, it is our goal to provide the best-trained people with the highest level of service, reaching middle-income families all over the United Kingdom. **This is purely a practice presentation.** You will be helping your friend gain confidence, skills and valuable training. At the end you will be asked to complete this survey — the more honest your answers, the more helpful this training experience will be. **Your friend cannot give advice.** At this time they are unable to give you any advice on your personal finances; they can answer questions of a factual nature.

What is your relationship to this person? _____

Did they tell you this would be a training exercise for them when they asked to get together with you? Yes ☐ No ☐

Did they give you a blue 'Your Family Matters' brochure near the beginning of the presentation? Yes ☐ No ☐

Did they briefly review it? Yes ☐ No ☐

Did they encourage you to read it more thoroughly at a later time? Yes ☐ No ☐

On a scale of 0 to 10, with 10 being the highest, how would you rate them in these areas? *(0 = really needs work, 10 = excellent)*

	0	1	2	3	4	5	6	7	8	9	10
Knowing the presentation	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Able to answer your questions	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Teaching financial concepts	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Overall performance	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Clear concepts	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Eye contact	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Smiling!	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

CLIENT ASSESSMENT

Survey Form — continued

Which areas can your friend improve upon?

What areas could their manager help them with?

What question(s) did you ask that they:

Told you that they were not allowed to answer? _____

Did not know the answer? _____

None ☐ I did not have any questions ☐

Any other comments:

Name of the presenter _____ Date _____

Your name _____ Your phone _____

Thank you again for helping to train our team! If you have any questions, problems or concerns, and would like to contact a Genistar supervisor, please ask the presenter for the contact details of their Executive Vice President.

CLIENT ASSESSMENT

Practice Makes Confident

5	**Do 5 = confident**
10	**Do 10 = becomes second nature**
20	**Do 20 = seen it all**

Return with the completed CAS — upline / EVP follow-up call.

Notes...

WORKSHEET 3B

My First 20 Appointments

For new people just starting out. As a Group Leader you'll already have done this — it's a great tool to use with every new person you bring in.

3–4 presentations to feel familiar · 7–10 to feel comfortable · 15–20 to feel like a pro. Track every Scoop through to the Carryback.

#	Client (and third party)	Scoop date	Carryback	Referrals	STEAM leads
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

STEP 4
Set an Outrageous Promotion Date

The goal is set in stone. The date is set in sand.

The sticky notes. Write your outrageous date on five sticky notes and put them where you'll see them every day — fridge, mirror, dashboard, next to the TV. Picture a leader in November whose realistic promotion date is next September. He writes 31/12 on every sticky note — and misses it. He resets to 31/03 — and misses that too. Then 01/06 — and is promoted about three months sooner than the "realistic" date.

My realistic EVP date (from my Step 2 maths): _____

My OUTRAGEOUS EVP date:

DD	MM	YYYY

Where my five sticky notes will go:

1. _____
2. _____
3. _____
4. _____
5. _____

I will be an EVP by _____ **. Signed** _____

Witnessed by my partner _____

STEP 5
Do the Thing AI Cannot

Real human connection. Welcome every new person personally — they could be your next EVP.

THE FOUR CONNECTION GAPS

1

The first 30 days
The moment they're most excited — and most likely to drift.

2

The gap between events
Big events happen 3–4 times a year. Life happens in between.

3

Distance from cities
If the nearest meeting is two hours away, they won't go.

4

Human connection
Every new person needs human connection — not just a group.

THE FIRST SEVEN DAYS — FOR EVERY NEW RECRUIT

Within 24 hours	Personal welcome call — your voice, not a text
Within 48 hours	Three-way WhatsApp introduction to their upline and trainer
Within 48 hours	Call their top 2–4 green STEAM leads
Within 7 days	A named local contact to connect with if there's no local meeting
Within 7 days	Invited to the nearest in-person event
Within 7 days	Top 25 list started, first BOA booked, licensing begun

"Everybody's story is different. Our job is to leave people better than we found them."

Notes...

BUILDING

The Rapport — F.O.R.M. and S.I.G.N.

Watch this video: youtu.be/pfoWv00eb7E

F	**FAMILY**	**S**	**SKILLS**
O	**OCCUPATION**	**I**	**INTERESTS**
R	**RECREATION**	**G**	**GOALS**
M	**MESSAGE**	**N**	**NEEDS**

- One of the best ways to build rapport and make a friend quickly is by using **F.O.R.M.**
- People like to talk about the things that interest them, such as their Family, kids, Occupation and Recreation — what they like to do for fun.
- It's important that you ask questions in these areas to find common ground before trying to communicate your **Message**.
- When you are talking to people, listen for **S.I.G.N.**: their Skills, Interests, Goals and Needs. When you know some or all of these, you can tailor your message more effectively.

EXAMPLES OF F.O.R.M. QUESTIONS

- **FAMILY** — Are you married? Do you have children? How old are they? Do you own your own home?
- **OCCUPATION** — Where do you work? What do you do? How long have you been doing that? What made you choose that career? What do you like about it? What don't you like? What would you change about it if you could?
- **RECREATION** — What do you like to do for fun? Do you have any hobbies? What do you do in your free time?

Notes...

ACTIVE
Listening

When F.O.R.M.ing you must constantly be listening for their 'hot buttons'. Ask yourself:

- Do they like helping people?
- Do they need more money?
- Are they good with people?
- Do they like self-development?
- What do you have in common with them?
- Are they open-minded to an opportunity themselves — or might they know someone who is?
- Are they influential?

EXAMPLES OF HOW TO TAILOR YOUR MESSAGE

'You mentioned that ...' — relate to something they have told you, then tailor your message accordingly. For example:

> *'You mentioned that you like helping people. Our company is expanding and we specialise in helping people in the area of finance. Who do you know who might be interested in earning additional income helping families?'*

Notes...

WORKSHEET 5

My Welcome Calls

Everyone who has joined your team in the last 60 days — whoever recruited them. Three calls before 9.30am tomorrow.

Name	Joined	Recruited by	Called	Next step
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	

MY WELCOME CALL — IN MY OWN WORDS

1. Who I am

2. Why I'm glad you're here

3. What happens next

4. When we'll meet in person

WORKSHEET 5B

My Story

People don't join a company — they join a person. Your story is what makes a stranger feel they know you. Keep it honest, keep it short, and finish with where you're going.

1. Where I was before Genistar

2. Why I said yes

3. My toughest moment — and what kept me going

4. What has changed since

5. Where I'm going next (EVP by ...)

Tell it in 60 seconds. Practise it out loud with your running mate until it sounds like you — then use it on every welcome call, home BO and interview.

DAY 1
Commitments

- [ ] My roadmap is finished, with my EVP gap circled
- [ ] My weekly number is written on my notebook and engrained in my mind's eye
- [ ] My five sticky notes are written tonight — up the day I get home, photo to my buddy
- [ ] Three welcome calls made before 9.30am tomorrow

TONIGHT'S HOMEWORK — BRING IT TOMORROW

- [ ] Score all 20 skills out of 10 (Worksheet 10A, page 68) — circle my three lowest
- [ ] Read pages 64–65, then date every dark box on my Recognition Tracker (page 66)

"Before you can be any good, you've got to be really bad — and before you can be bad, you've got to try."

What I learned today...

STEP 6
Widen Your Reach

The activity that got you to Group Leader will not get you to EVP. Meet more people. Have more conversations.

THE 7 ENGINES OF RECRUITMENT

1. **Home-based BOMs**
   A BOM over Zoom into a team member's home. Guests book IBAs and FGPs on the night. Pilot: 20 guests in Colchester and Middlesbrough → 9 IBAs and 3 FGPs; 45% booked an IBA.

2. **Lestz Talk Money**
   Local sessions: one hour on money, one hour on the business. Free venues; guests invited because they live nearby.

3. **In-person BOM — the big push**
   The highest guest-to-recruit conversion. People bring people.

4. **Naxum online BOMs**
   Your personalised landing page. Daily online BOMs book straight into your diary as a client or a potential recruit.

5. **Regional Fast Start Schools**
   Training and connection where your team lives, funded by ticket sales.

6. **WhatsApp status change**
   Update your WhatsApp status with your story, your wins and your next event. Everyone who views or replies is a warm conversation — invite them to a BOM.

7. **One-to-one presentations**
   Show the opportunity one to one — at the kitchen table or on Zoom — to STEAM leads and warm contacts.

MY ENGINE PLAN

Engine	Running now? / start	Guests a month	Who leads it
Home-based BOMs			
Lestz Talk Money			
In-person BOM			
Naxum online BOMs			
Regional FSS			
WhatsApp status change			
One-to-one presentations			

SWEET SPOT
Market

SWEET SPOT MARKET — 5 STARS

1	2	3	4	5
Married	Kids	Home	Employed	25–55 years of age

WHY?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Notes...

SWEET SPOT
Market

» Why, on an aeroplane, do they tell you to get your O_____ M_____ on first, before helping someone else?

» We want to help E_____, but help your F_____ first.

» How will your P_____ and F_____ react to you working all the time with Genistar, and N_____ M_____ M_____?

» Schedule time in O_____ H_____, for people to help when you know you are N_____ getting P_____, and tell your family it's volunteer work.

» Sometimes you have to start in the W_____ market to get referrals into the S_____ S_____ market.

CREDIBILITY

1. I_____ plus K_____ = C_____.

2. Setting the appointments correctly using I_____ and K_____.

3. My K_____ without your I_____ has no C_____.

4. You have I_____, but do your friends think you have K_____?

RECRUIT EVERYBODY

» Recruit E_____! — B_____ people.

» Give them a C_____! Let them P_____ themselves.

Notes...

MEMORY
Jogger

Download the **Memory Jogger** and have it ready to email, WhatsApp or share on screen at every carryback.

GENISTAR

INTRODUCTIONS
(Merely list these below)

	Name	Home	Marr	Kids	Job	Age
1. Work with						
2. Works for you						
3. Eat lunch with						
4. Brother						
5. Sister						
6. Who lives on your left? Right?						
7. Relatives (in the area)						
8. Closest friend						
9. Father over 40 with children under 10						
10. Working couple						
11. Single working people						
12. Is thrift minded						
13. Financially successful						
14. Recent job promotion						
15. Is in business partnership						
16. Company with poor or no pension plan						
17. Owns a business						
18. Service business (eg. Grocer, butcher)						
19. Church, golf, football						
20. Wealthy grandparents						
21. Works afternoons						
22. Works during night						
23. Day off during week						
24. Doctor-dentist-minister						
S 25 Best salesman						
T 26 Teacher						
E 27 Enthusiastic						
A 28 Ambitious						
M 29 Needs more money						

NOW: "I've just met a man/woman who has a great idea. I've asked him/her to call on you and I suggest you talk with him/her when he/she calls. His/her name is ..... In fact, he/she is here right now, let me get him/her."

LATER: If asked: "What is it?"
Say: I'd explain if I could but I really can't. It's a good deal though and it's unique.
So talk to him/her when he/she calls and get all the details.
Just listen, it's worth the time! "

F0550 12/16

COMPLETING
The Referral Card

QUALIFYING REFERRALS — FILTERING QUESTIONS

- Who are the top 2 most enthusiastic? — **E**
- Who are the top 2 most ambitious? — **A**
- Who on here either is or used to be in sales? — **S**
- Who on here either is or used to be a teacher or in training? — **T**
- Who on here needs money right now, or is money motivated? — **M**

Of these people you've introduced me to:

- Who do you know best? — **BF**
- Who are the top 2 highest income earners? — **££**
- Who could I see during the daytime?
- Who do you know who is a centre of influence? — **I**

TEXT MESSAGE SYSTEM

Here is a compliant message:

> *Hi (Referral), (Client) has asked me to text you. I have recently shown her/him some ideas on how to make and save some money, and she/he 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, (Representative).*

Notes...

3-WAY WHATSAPP
To Referrals

Use these straight after the referral cards are completed. Your client sends the message in a WhatsApp group with you (or your upline) and the referral — so you arrive as a recommendation, not a stranger. Reply in the group the same day.

a **Referral introduction**

Hey [referral's name], I wanted to introduce you to [rep's name].
They are helping me plan for my future and other financial goals. I asked them to reach out to see if they can help you as well. Their number is [mobile number]. As a courtesy, please give them a few minutes of your time.

b **3-way field training**

Hey [their name], I need your help...
I want to introduce you to my manager, [manager's name]. I'm currently getting licensed in financial education and I need to witness 3–5 presentations for my training.
It will only take 50 minutes — can you meet today, or is tomorrow better?

c **Homeowners — mortgage**

Hi [prospect], I want to introduce you to [rep's name]. They have shown me how to save considerable time and money on my mortgage, and it's working. It's unique and unlike anything you will have seen before. Listen to what they have to say — it doesn't cost anything to hear.

d **Wills and trusts**

Hi [prospect], I want to introduce you to [rep's name]. They have shown me how to protect my assets from tax, and from care home fees being paid from my estate, and it's working. It's unlike anything you will have seen before. Listen to what they have to say — it doesn't cost anything to hear.

e **Home insurance**

Hi [prospect], I want to introduce you to [rep's name]. They have shown me how to save a considerable amount of money on my home insurance, and it's working. Listen to what they have to say — it doesn't cost anything to hear.

For the mortgage, wills and insurance texts, the client adds: "[Rep's name], would you be able to step in and share some further information with [prospect]? I hope this works for everyone and look forward to the discussion."

THE GREEN CARD
System

Ron Webber, Primerica NSD: 34 years in the business and a $1.7 million commissionable annual income, featured on the Sunday Night Call. He built a repeatable, trackable recruiting system around one tool — the Green Card — and ran it with obsessive discipline, week after week, for over twenty years.

> *"The script is not the secret to the Green Card System. It's the Green Card itself."*
> *— Ron Webber*

STEP 1 — ASK FOR THEIR BEST TWO

Never **initially** ask for a list of 25–50 names. The average person only has real credibility with two or three people — the top 25 list comes later, once they've got going with their initial 2–4 STEAM leads and are more committed. Ask:

> *"If you started a business, couldn't run it yourself, and had to invest £2 million into it — but had to hire two people you know to run it for you — who would they be?"*

- Ask for first names only, one at a time — don't let them lose their train of thought.
- Praise the first name generously — it makes them want to impress you with the second.
- After two, ask "You probably had a third one, didn't you?" — it usually surfaces a third and even a fourth.

STEP 2 — WHAT GOES ON THE CARD

Question	Example answer
How do you know the candidate?	"He's my buddy at work."
What do they do for a living?	"He's a plumber. Same company as me."
What makes them a candidate?	"Can't stand the job, wants a strong second income."
Any special interest?	"Loves the band Rush." — the detail that proves it's real

This is exactly what you feed back on the call. It turns a stranger's phone call into a warm, credible conversation.

Notes...

THE GREEN CARD
Call & the Handoff

STEP 3 — THE CALL: FEED IT BACK

01 **Open with the name check**
"My name's [you]. Does my name sound familiar?" The answer doesn't matter — it just breaks the ice.

02 **Name the connection**
"[Referrer] recommended you to me as a possible candidate. I value their opinion — I'm working with them personally."

03 **Feed back the details**
Repeat what's on the card, word for word — job, motivation and the personal detail. It proves this is a real referral, not a script.

04 **Invite to the briefing**
"I'll be running a business overview on Monday at 7.30pm — would this Monday or next work better?" Always offer two options.

STEP 4 — THE HANDOFF: ORCHESTRATE THE CONNECTION

"You'll see [referrer] in the foyer, because they'll be there."

- Confirm the referrer will attend the same briefing — and tell the prospect so.
- Offer to have the referrer pick them up if they're on the way — you make the connection, not them.
- For over 20 years, roughly 59% of everyone who attended one of Ron's briefings joined the business.

MISTAKES THAT BREAK THE SYSTEM

- **Asking for a long list of names** — ask for two; you'll usually get up to four anyway.
- **Calling low-credibility referrals** — if the referrer barely knows them, the call has no warmth.
- **Skipping your own Financial Game Plan** — do it within 24–48 hours of a new IBA joining, so they have their own story to tell.
- **Not tracking your ratios** — without them, a bad week feels like failure instead of normal variance.

Notes...

GREEN STEAM
Cards

Don't reinvent the system — it has already been created. Use these two practice cards in the workshop, then order your own.

STEAM CARD

Name: _____ Age: _____

Mobile: _____ Tel: _____

Address: _____

Occupation: _____

What makes this person a candidate: _____

Special interest: _____

Referred by: _____ Relationship: _____

Appointment: _____

S ☐ **T** ☐ **E** ☐ **A** ☐ **M** ☐

M ☐
K ☐
H ☐
E ☐
25+ ☐

STEAM CARD

Name: _____ Age: _____

Mobile: _____ Tel: _____

Address: _____

Occupation: _____

What makes this person a candidate: _____

Special interest: _____

Referred by: _____ Relationship: _____

Appointment: _____

S ☐ **T** ☐ **E** ☐ **A** ☐ **M** ☐

M ☐
K ☐
H ☐
E ☐
25+ ☐

THE GREEN CARD
Numbers

"The numbers will never beat you if you understand what your ratios are." — Ron Webber

100%	83%	46%	59%
calls made — every green card worked	said yes — committed to attend	showed up — of those who said yes	recruited — of those who showed

Over four years Ron tracked 1,255 green card calls → 1,047 said yes → 479 showed up → 286 recruited. Net effect: roughly **1 in every 5 calls (22%) becomes a recruit**.

REVERSE-ENGINEERING 17 RECRUITS A MONTH

17 recruits ÷ 22% ≈ **80–85 green card calls a month ≈ 20 a week ≈ 4 a working day** — about 20 "best two" conversations a month at roughly 4 cards each. Ron made 617 calls in his first year: about one and a half a day.

Power Hour: a set time each week when green card calls are made live, together, as a team. "If you're in Power Hour, I make your calls first. If you're not, your cards go to the bottom of the pile." Report the numbers at the Friday Baseshop meeting.

MY GREEN CARD TRACKER

Week	Calls	Said yes	Showed up	Recruited	My ratio
Week 1					
Week 2					
Week 3					
Week 4					
Week 5					
Week 6					
Week 7					
Week 8					

BOOKING
Scoop Script

(Smiley Track) Third party phone script for booking scoops — NEVER BE without this script.

Hello (client name), ... (3rd party name and surname) asked me to call you. Did you receive my text? **WFA**

TEXT RECEIVED: Well, I'm really glad I called then. Is this a convenient time to talk? **WFA** Great! My name is ..... I'm a representative of an FCA-regulated company called Genistar. I was recently with (3rd party) and they asked me to call you and see if we could arrange to show you and your husband/wife/partner the same thing I showed them.

NO TEXT RECEIVED: Well, I'm really glad I called then. I met with (3rd party) and they ASKED me to share some financial concepts with you that they had never heard before. They made me promise to get together with you and (partner) and give you a brief overview.

(F.O.R.M. them; find common ground)

Based on our conversation, let's go ahead and book an appointment with you and your husband/wife/partner. When would be a good time to book an appointment to meet on Zoom? Evenings or weekends? **WFA**

Offer 2 time options: Would 7pm be good, or 9pm better?

Do you prefer an online appointment or for me to come to your home?

Online: What is your email address? **In home:** What is your full postcode?

Just in case you need to get hold of me, save my name into your phone. You may want to allow us about 60–90 minutes. I look forward to meeting you and (partner) on (day) at (time).

ALWAYS — ALWAYS
After setting an early appointment, ask: "What's the earliest time we can get together?"
After setting a late appointment, ask: "What's the latest time we can get together?"

Notes...

BOOKING SCOOP
Handling the Questions

What is it? — It's financial education, and (3rd party) said it was very beneficial to them financially and they ASKED me to simply share the same concepts with you.

What is it? — I'd be glad to explain it to you. (3rd party) ASKED me the same question. Then after I showed them what we do, they were so impressed they asked me to contact you too. I'm sure you would agree that spending approximately 14,000 hours in school and higher education, and learning next to nothing about money, is alarming and, quite frankly, ridiculous.

What is it? — We are a financial education company. We teach people how money works and how to become financially free. They said it was completely different from anything they had ever seen and felt that you would be interested in finding out ways to save and make more money — is that the case? **WFA** There is no cost for this information. (3rd party) ASKED me to share it with you and I promised them I would try to fit you into my schedule. I promise I am not coming over to sell you anything; (3rd party) simply asked me to show it to you personally.

Not interested — (3rd party) felt the same way at first, but once I showed them what we actually do they found it very beneficial, and they felt that you would find it interesting and useful.

Not interested — OK, that's fine. For some people it's just not the right time. However, circumstances change. Would it be OK for me to keep your number and perhaps call you back in 3–6 months' time?

Still not interested — OK, that's fine. (3rd party) also said you may know some people who are looking to make additional income on a part-time basis. Our company is expanding. Who do you know who may be interested in earning an extra £1,000–£2,000 per month working around 6–8 hours a week part time?

Send me information — I would be happy to, but if that method of communication worked in our business then we would just send out leaflets instead of speaking to people. It would be like trying to get a haircut over the phone.

I'm too busy to meet — call back — That's fine. When would be the best time to call you? By the way, (3rd party) also said you may know some people who are looking to make additional income on a part-time basis. Our company is expanding. Who do you know who may be interested in earning an extra £1,000–£2,000 per month working around 6–8 hours a week part time?

REFERRAL TEXT: Hi (person's name). I hope you're doing well. I recently met with a business leader and financial coach called (person's name). They shared some financial concepts with us which helped us make some informed decisions that I found very helpful. They also mentioned that, as part of their expansion, they were looking to partner with a few ambitious people. Is it okay if I pass (person's name) your number?

THE MAGIC
Question

'Who do you know who could use an extra £1,000–£2,000 per month, if they could earn it in just 6–8 hours per week, part-time?'

Note: It is important to ask this in a very low-key manner and not come on strong. Don't sell! The person will normally say 'Sure, what is it?' The only answer to give is:

'TRUST ME, YOU NEED TO SEE IT'

You can say TRUST ME in different ways — some suggestions:

'I would tell you more if I could, but I am brand new myself. As a matter of fact, I would like you to watch a short video so that I can get your opinion.'

'Look, I want you to get the whole story and all the facts. Do you have a few minutes to take a look and let me know if you like what you hear and see?'

'I want you to get all the information from one of the top people in the company. I know them personally, and they will answer all your questions one-on-one.'

If they say 'Well, tell me a little bit': 'I can do better than that. I'll send you the video and you can hear the entire thing. It takes just a few minutes. In fact, we could watch it together if you like.'

If they are close friends and really press, the most you should say is: 'OK, I can tell you this: it's a financial education company. It's a real ground-floor opportunity that you need to see to make up your own mind. Can you spare a few minutes to watch an overview of who we are, what we do and, most importantly, what's in it for you if you were to get involved?'

If all else fails and they are cynical: 'Please watch the Business Overview to understand all the information. If it's not for you, that's okay — maybe you could forward it to someone else who might be interested. Does that make sense?' If this doesn't work, just say 'NEXT!'

REMEMBER: people attend an overview for 4 main reasons — **NEED · DESIRE · CURIOSITY · FRIENDSHIP** — not because of the information! Too much information makes people assume they know what Genistar is all about before they get all the facts, and then they won't see it for themselves.

Notes...

RECRUITING
Script

3rd Party Recruiting Script (ISTEAM Track)

Hello (client name), ... (3rd party name and surname) asked me to call you. Is this a convenient time to talk? **WFA**

Great! My name is ..... I was recently with (3rd party) and they asked me to give you a call. They told me you are an ambitious and hardworking kind of person (and/or a person who likes helping people) — does that sound right? **WFA**

They also said that you are open-minded and may be open to an opportunity to earn additional income — is that the case? **WFA**

Well, obviously I don't know whether you would be a right fit for us, but based on (3rd party's) recommendation, I promised them that I would give you a call.

What do you do at the moment, if you don't mind me asking? WFA

(F.O.R.M. them; find common ground.) FORM question examples: What made you go into that profession? What do you like about it? What don't you like? What would you change if you could? Do you like helping people?

Based on our conversation, would you like me to send you a video? We have a business overview video which will give you an opportunity to find out what we do in more detail. If you like what you see, we will arrange a follow-up interview to see if we have a mutual interest. Is that OK? **WFA**

If you can't get a YES for the Overview, get a YES for a Scoop. Book an online presentation or ask who they might know who could use additional income. Use the MAGIC QUESTION script.

Notes...

RECRUITING SCRIPT

Handling the Questions

I'm sure you would agree that spending approximately 14,000 hours in school and higher education and learning next to nothing about money is alarming and, quite frankly, ridiculous.

What is it? — We are a financial education company. We teach people how to become financially free. I'm sure you can appreciate that there is a lot of need for what we do right now, which is why we need more people.

What would I be doing? — That's a great question, and it's exactly what we cover in our Business Overview video.

What would I be doing? — We have a programme to train people to educate others on their finances, as well as to own their own business with us. Watch a video or meet one to one.

Is there a cost involved? — There is no cost for the business overview at all. It is an information-only event.

Is there a cost involved? — There is no cost for the business overview. If you decide that it's the right opportunity for you, then there is a small fee to cover the cost of administration as well as the various checks that we need to do to get you licensed and on the company register.

Is this a pyramid? — No. A pyramid is an illegal type of business. We are authorised and regulated by the FCA, and the FCA doesn't authorise illegal business models, so I would have to say 'No'.

Do you have a website? — Yes, we have a fantastic website: genistar.online. However, in order to get the full picture, you need to watch the video. It will explain how you can earn an extra income and make an impact in your community.

I'm too busy to talk now — That's fine. When would be the best time to call you? By the way, (3rd party) also said you may know some people who are looking to make additional income on a part-time basis. Our company is expanding. Who do you know who may be interested in earning an extra £1,000–£2,000 per month working around 6–8 hours a week part time?

Not interested — I totally understand that you're not interested in something you haven't had a chance to see yet, but do you know of anyone who might be interested in earning an extra £1,000–£2,000 per month, or looking for a career change?

Still no — No problem. Is it OK if I give you a call in 3–6 months' time to see if anything has changed?

Notes...

WORKSHEET 6

My Reach Plan

Engine I will add #1: _____ **Start date** _____

Engine I will add #2: _____ **Start date** _____

My first home business overview — host: _____ **Date** _____

Tuesday Third-Party Referral System training (9.30–10.30am) booked ☐

10 CLIENTS I WILL ASK FOR INTRODUCTIONS THIS MONTH

#	Client	Carryback date	Referrals	STEAM leads
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

STEAM LEADS I WILL CALL THIS WEEK

1. _____
2. _____
3. _____
4. _____

STEP 7
Create Momentum

Take ownership. Run the presentations yourself. Build the calendar — don't wait for someone else to. Success loves speed.

4 PRIORITIES OF THE TRAINING SALE

1. Train the recruit

If this is all T_____ Y_____ D_____, you have been a S_____.

2. Recruit the client

Get them excited. Offer additional income.

3. Get 10 referrals minimum

Most F_____ will give R_____ even if they just get I_____ as a client.

4. Take on a client

But this only H_____ after an FGP on the 2nd A_____ (Carryback).

Notes...

TRAINING
Triangle

Using the triangle script to explode your business. You and your recruit are on a Zoom call together. Your recruit calls the referral:

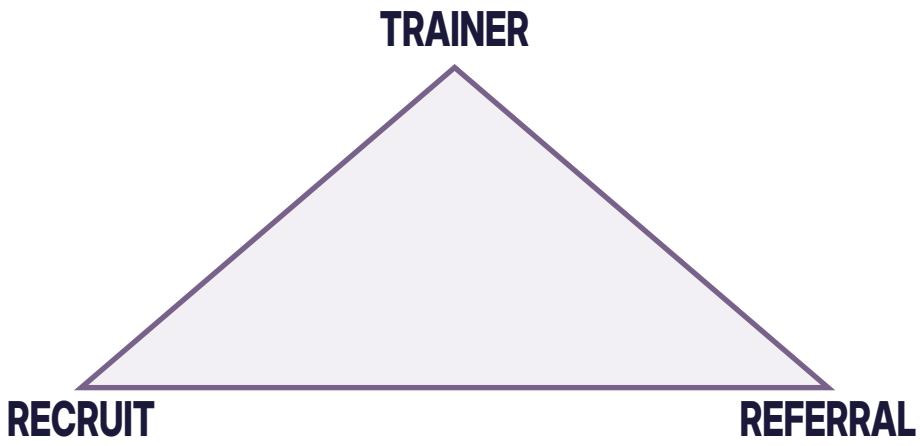
[Referral], my name is [Trainer], I have [Trainee] here with me. *(They will exchange greetings. When questions begin, turn the phone back over to the Trainer.)*

[Referral], the reason I called is [Trainee] recently got involved in business with us and is in the process of obtaining their certification.

In order to finalise their requirements for the position with us, they need to be in the field with a field trainer like myself and witness at least two of our financial education presentations. [Trainee] felt that, out of all the people they knew, they felt most comfortable asking you for help. **WFA**

We will be together on Zoom _____ evening ... so which time would be better for you, 7pm or 9pm on _____? **(Book it)**

Thanks, and your partner will be there too, right? **WFA** I look forward to meeting you and (partner) on _____ (day) at _____ (time).
Watch: youtu.be/9las6w23KuY



Notes...

BOOKING TRAINING

Scoop Script

Use this script on your own to book yourself 2 or 3 training Scoops. If you don't feel confident using it, speak to your trainer about getting together and using the Training Triangle Script with them (page 50).

Hello _____ (friend or family member). *Chat about something unrelated for a few minutes — how are the kids, etc.*

Actually, the reason I am calling is that I really need a favour. You know that we've been looking for a way to help people, improve our financial situation and reach our goals and dreams. Well, we think we've found it. *(Mention the things they know you for.)* I'm not sure if you know, but I have recently started with a new company and, as part of my training, I need to observe my trainer doing a presentation with some real people. I would feel really comfortable with you and _____ (partner's name).

You don't need to do anything except listen and ask questions as they come up. You don't have to buy anything and they won't try to sell you anything — you would just be doing me a big favour to help me get trained.

Is that OK? Would you be happy to help me get trained? **WFA**

Great — when is the best time for me and my trainer to set up an online appointment / visit your home to meet with you and _____ (partner)? Is an evening or a weekend better? **WFA**

Possible objections you can overcome

What is it? It's a financial education company. They teach families how to become financially free. Actually, I think that you and _____ (partner) will really enjoy it. It's really interesting.

Does my partner need to be there? Yes, it doesn't really work with just one of you.

Will I have to give any financial information? You don't have to do anything at all except look at, and listen to, a presentation; this is really just to train me.

Can they help us in our financial situation? I am sure they can, and if you like what you see then I am sure you could ask my trainer when we meet, and they can tell you what the next steps would be.

Notes...

WORKSHEET 7

My 90-Day Calendar

An event every week. A strategy meeting and training scoops for every new recruit. You present the business overview yourself at least once a month.

Wk	w/c	Recruiting event I run / host	Training scoops	I present	Strategy meetings
1				☐	
2				☐	
3				☐	
4				☐	
5				☐	
6				☐	
7				☐	
8				☐	
9				☐	
10				☐	
11				☐	
12				☐	
13				☐	

WORKSHEET 7B

Fill Convention from the Bottom Up

Genistar's 20th-anniversary Convention, March 2027. Start at the bottom with the newest person (A) and work up. Phone — never just the WhatsApp group. They need to hear the excitement in your voice.

	Leg 1 — name	✓	Leg 2 — name	✓	Leg 3 — name	✓
E		☐		☐		☐
D		☐		☐		☐
C		☐		☐		☐
B		☐		☐		☐
A		☐		☐		☐

Notes...

STEP 8
Find New Running Mates

Run with people who are going where you are going. Love your old friends — but run with the people who will challenge you.

THE ABC OF THE BUSINESS

A **Always bring people**

- To Saturday training
- To BOMs
- To the big event

B **Be a good student**

- Be coachable
- Use a business diary
- Use an A4 notebook / device

C **Cheerlead**

- Cheerlead your upline
- Cheerlead the company
- Cheerlead the system

Notes...

MECCAH
Identifying Winners

Spend your best hours on the people most likely to win. Before you invest in someone, check them against MECCAH.

M **Market**

Has a natural 5-star market

E **Ethic**

A real work ethic

C **Coachability**

They like you and you like them

C **Circumstances**

Spousal support, solid finances, no time constraints

A **Attitude**

An "I can do" mindset — part of the solution, not part of the problem

H **Hungry**

Ambitious, and wants to become somebody

SCORE YOUR CANDIDATES — 1 TO 5 ON EACH

Name	M	E	C	C	A	H	Total /30

Your top two are usually the highest totals — but a low score on Circumstances or Attitude is worth a conversation before you invest.

WORKSHEET 8

My Top Two & My Running Mate

LEADER 1 _____

☐ Market ☐ Ethic ☐ Coachable
☐ Circumstances ☐ Attitude ☐ Hungry

G **Goal — what do they want by the end of the month?**

R **Reality — what does their diary show?**

O **Options — what could they do? What else?**

W **Will — what will they do, by when?**

LEADER 2 _____

☐ Market ☐ Ethic ☐ Coachable
☐ Circumstances ☐ Attitude ☐ Hungry

G **Goal — what do they want by the end of the month?**

R **Reality — what does their diary show?**

O **Options — what could they do? What else?**

W **Will — what will they do, by when?**

My running mate from this room: _____ **Phone** _____

Our weekly 10-minute call — day and time: _____

I am joining:
☐ £100k coaching group (20+ FGPs since 1 March)
☐ Accountability Group (2 FGPs a week)

MANAGEMENT
Exchange

Replacement — the jewel of the Genistar system.

TRADITIONAL BUSINESS

- The upline leader doesn't want you to know everything — you may be their replacement
- You train your ambitious key people, who later become your competitors
- They take other trained staff from your business
- No income is earned from developing other leaders
- You are constantly starting over with new people

GENISTAR

- Unlimited positions at the top
- Everyone starts at the same level with the same opportunity to go to the top
- When someone you develop becomes an EVP, they leave a strong leg with you
- You are rewarded for developing leaders — a 7.5% override
- You never experience loss by developing leaders

EXACTLY THE OPPOSITE OF A PYRAMID



"To develop total financial freedom all you have to do is develop 7–10 key leaders who develop 7–10 key leaders." — Art Williams, who developed 7 direct EVPs, which yielded 6,000+ Vice Presidents

Notes...

EVP QUALIFICATIONS
& the Exchange

01

6 directs
2 Senior Team Leaders and 4 Team Leaders

02

10x10 for 2 months in a row
(Multiple 10x10s if you want to come out strong)

03

Acceptable management exchange
Acceptable to your EVP

"Allow your EVP to develop a GL doing 10x10." — Jon Lavin, SNSD, Primerica

THE GUIDELINES — YOUR EVP CAN CHOOSE BETWEEN

2 Senior Team Leaders	1 Group Leader	3 Team Leaders

- Allow your upline to work depth and build a relationship with the downline
- Cheerlead your upline — it will come back to you
- **You are not qualified to go EVP without a strong and worthy replacement**

ONCE YOU BECOME AN EVP: DEPTH = WIDTH

The Team Leaders, Senior Team Leaders and Group Leaders you build in depth become your width. When someone you develop becomes an EVP, they go through management exchange once — then receive a management exchange every time they develop a new EVP. It encourages EVPs to work depth with new recruits, gets everyone working towards the same goal and develops an ongoing source of leadership. It pays to build wide and deep.

The secret formula: you only need to produce 2 direct EVPs — one to go EVP, and one to get replacements from over and over and over.

What does it take? "You are in Bill's baseshop. What are you going to give for your replacement?" — "I'm going to give him ALL HE WANTS, because only then can I take all I want and get the 7–10 direct EVPs Art talks about. Then my EVPs will do the same."

Notes...

A £1,000,000 Income in Genistar

Focus on building a strong Baseshop with the purpose of producing strong EVPs — and develop a builder's mindset. Strong leadership builds exponential growth: 12 EVPs × 3 = 36 second-generation EVPs × 3 = 108 third-generation EVPs, each averaging £7,500 a month activated premium. The SVP bonus is shared with other qualifiers, so only a quarter is counted.

Level	Premium per month	Your %	Your monthly income
Your Baseshop	£35,000	40%	£14,000
12 1st-generation EVPs	£90,000	7.5%	£6,750
36 2nd-generation EVPs	£270,000	5%	£13,500
108 3rd-generation EVPs	£810,000	3.75%	£30,375
SVP bonus — ¼ share (5% shared)	£1,205,000	1.25%	£15,063
Total — 156 EVPs	£1,205,000		£79,688 a month

£79,688 × 12 ≈ **£956,000 a year** — plus mortgages, wills, B&C and more, which are not counted. *Illustrative example, not a guarantee of earnings.*

Owning a franchise like Subway, McDonald's, Costa or KFC typically costs £250,000 to £1 million, for an average net income of £35,000–£50,000 a year — with no overrides for helping others own one. **The management exchange is like your franchise fee — but instead of paying out, you're paid to help others reach EVP.**

IT HAS BEEN DONE

- **Bob Safford Senior** developed 16 direct EVPs, which yielded 63 first-generation EVPs and over 700 EVPs — all through management exchange. £3 million a year.
- **Lloyd Tomer** only recruited 3 people — and had 91 EVPs. 60 of them came from Jeff's management exchange.
- **Jon Lavin** (SNSD, Primerica USA) — 88 RVPs; his Baseshop averaged 50x50 for 18 months. **Asaad Faraj** (SNSD, Primerica USA) — 111 RVPs; his Baseshop averaged 90x90 for 18 months.

"If you will do for 18 months what others won't do, then you can do for the rest of your life what others can't do!"

Notes...

WORKSHEET 8B

My Management Exchange

Homework — within 7 days of the course. Complete this page, then sit down with your EVP and agree the exchange.

Which leg can my upline EVP work depth in to find a management exchange?

Who are the 1 or 2 people who could become my first EVP in the 6 months after my promotion?

Will I come out as a strong EVP or will I struggle? Why?

Will I be doing 10x10 after my management exchange? How?

The exchange my EVP and I agree:

☐ 2 Senior Team Leaders ☐ 1 Group Leader ☐ 3 Team Leaders

Which leg(s) will my EVP take as management exchange? _____

The leg I keep and will build wide and deep: _____

Agreed with my EVP on (date): _____

Notes...

WEEKLY
Promotion Training

Two weekly trainings to get your next promotion. Put them in your diary now — every week.

TUESDAYS · 9.30AM

Third Party Referral training

The referral system, the scripts and the green STEAM leads — practised live every week.

THURSDAYS · MIDDAY

£100k per annum training

For everyone building towards a £100,000-a-year income — the habits, the numbers and the accountability.

I'll attend Tuesday referral training from (date): _____

I'll attend Thursday £100k training from (date): _____

Notes...

STEP 9
Keep Yourself on Track

Touch the business every day. Keep reminding yourself why this promotion matters — and stay on the system.

WHERE IT ALL STARTED

When Bob Safford Snr's wife, Pat, died, Bob spent a year out of the business. When he came back, everyone had got off the system and they were all doing it their own way. It was too late — the horse had bolted. Bob spent the rest of his career trying to reverse this!

We need to get this system embedded in Genistar to allow the compounding of EVPs — from 50 to 100 to 250 to 500 EVPs!

YOUR RHYTHM

Daily	Touch the business · Power Hour — bookings first · look at your sticky note
Weekly	Sunday night call · Monday huddle · Friday 5pm Baseshop · contribute to Saturday training
Monthly	Review your roadmap · re-check the EVP gap · reset the date, never the goal

Notes...

THE WEEKLY
Rhythm

An EVP's week has a shape. Lock in the team rhythm first, then build your own blocks around it.

Day	Team rhythm	Time	I'll be there
Sunday	Sunday Night Call (Zoom)	10pm	☐
Monday	Baseshop huddle (Zoom)		☐
Tuesday	Third-Party Referral System training	9.30–10.30am	☐
Thursday	£100k per annum training	Midday	☐
Friday	EVP Corner (Zoom)		☐
Friday	Baseshop meeting	5pm	☐
Saturday	Contribute to Saturday training / EVP2B		☐

MY OWN BLOCKS

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Morning							
Afternoon							
Evening							

Daily Power Hour at _____ **Appointment evenings** _____

Weekly recruiting event (day/time) _____

RECOGNITION
& Incentives

Genistar recognises the people who do the work. Know what you are going for, how it is won — and put a date on it.

Award	What you receive	How it's won	My target
Go Getter	VIP treatment at the next event · public recognition · Go Getter goody bag · premium seating · VIP name badge · snacks and refreshments	Personally produce 3 recruits and submit £3,000 in annual Vitality premium in the same business month. EVPs also achieve Go Getter by helping 3 team members achieve it in one business month.	
Circle of Champions	Circle of Champions recognition (formerly the Blue Vase)	Qualify as a Go Getter for 3 consecutive months	
10x10	Black polo shirt with 10x10 in gold	Submit at least £10,000 in team premium and produce at least 10 approved IBAs per business month, for 3 consecutive months	
120 Club	Photo tile on the Wall of Fame at the Field Support Centre · recognition with a glass trophy	Produce £120,000 in team premium and 120 approved IBAs in any 12-month rolling period	
204 Club	Genistar white gold signet ring for you and your partner	Produce at least 204 approved IBAs in any 12-month rolling period	
£50k Cross Pen	Engraved gold and silver pen for the EVP · engraved blue pen for the EVP's partner	Cashflow of £50k in any 12-month rolling period	
£100k Ring	A ring from the £100k Club collection for the EVP and the alternate style for the partner (or two medium rings). An extra diamond for every additional £100k after £200k cashflow in any 12-month period.	Cashflow of £100k in any 12-month rolling period	

Award rules may be amended at the discretion of the Board of Directors at any time; in the event of a dispute, the decision of the CEO is final. Always check the current rules.

Notes...

PROMOTIONS

Trips, Awards & Ownership

EVP Promotion

EVP plaque with your name and date of promotion · Genistar EVP black polo shirt

SVP Promotion

SVP plaque · SVP black polo shirt · chance to qualify for the SVP bonus · Genistar SVP blazer

NSD Promotion

NSD plaque · NSD black polo shirt · special planned events with the CEO

Qualifications: refer to the company promotion rules.

COMPANY INCENTIVE TRIPS

Company incentive trips for qualifiers — refer to the qualifications for each trip.

ANNUAL AWARDS — ENGRAVED GLASS TROPHIES AT CONVENTION

- Rookie of the Year
- Most Valuable Player (MVP)
- Top Baseshop Balanced Builder
- Highest Baseshop Premium
- Highest Companywide Personal Premium
- Top Baseshop Recruiting
- Top Companywide Personal Recruiting
- Premium Improvement of the Year
- Recruiting Improvement of the Year
- Rising Star
- Personal Balanced Builder
- SVP Hierarchy MVPs
- NSD Choice Award

OWNERSHIP

Genistar has a unique programme where you can qualify for ownership of your business as an EVP. Refer to the Ownership policy for more information.

MY RECOGNITION TARGETS

The first award I will win: _____ **By** _____

The annual award I'm going for: _____ **By** _____

Who I will take on stage with me: _____

WORKSHEET 9B

My Recognition Tracker

Tonight's homework (Day 1). Write your target date in each dark box. When you qualify, write the date in the next box — and bring this page to the stage.

MONTHLY — WIN THEM AGAIN AND AGAIN

Go Getter
3 recruits + £3,000 Vitality AP

TARGET	Qualified 1	Qualified 2	Qualified 3	Qualified 4	Qualified 5
Qualified 6	Qualified 7	Qualified 8	Qualified 9	Qualified 10	Qualified 11

Circle of Champions
Go Getter 3 months running

TARGET	Qualified 1	Qualified 2	Qualified 3

10x10
£10k team premium + 10 IBAs × 3

TARGET	Qualified 1	Qualified 2	Qualified 3

ANNUAL CLUBS — ANY ROLLING 12 MONTHS

£50k Cross Pen
£50k cashflow

TARGET	QUALIFIED

£100k Ring
£100k cashflow

TARGET	QUALIFIED

120 Club
£120k premium + 120 IBAs

TARGET	QUALIFIED

204 Club
204 approved IBAs

TARGET	QUALIFIED

PROMOTIONS, TRIPS AND AWARDS

EVP
Plaque and black polo

TARGET	ACHIEVED

SVP
Plaque, polo, blazer, bonus

TARGET	ACHIEVED

NSD
Plaque, polo, CEO events

TARGET	ACHIEVED

Incentive trip
Per-trip qualifications

TARGET	ACHIEVED

Annual award
At Convention

TARGET	ACHIEVED

Ownership
EVP ownership policy

TARGET	ACHIEVED

WORKSHEET 9

My Scorecard & My Why

Your weekly accountability — eight numbers, one page. Write them down and send them to your running mate every Friday.

Accountability	Target	Week 1	Week 2	Week 3	Week 4
Yeses (for guests)					
Guests					
IBAs					
Scoops booked					
Scoops done					
Carrybacks done					
Premium closed					
Referrals					

THE 7 FS — BECOMING AN EVP WILL LET ME ...

Faith _____

Family _____

Friends _____

Finances _____

Fun _____

Firm _____

Fitness & health _____

WORKSHEET 10A

60–90 Day Worldclass Checklist

Tonight's homework (Day 1). Score yourself out of 10 on each skill, circle your three lowest and bring this page to Rise Above. Then review it with your upline every 30 days.

Rep: _____ **1st Upline:** _____ **EVP:** _____

Skill	Marks /10	Notes
1 Phone Calls/Scripts		
a) Third Party Referral		
b) Training Triangle		Objective is to train the recruit. Recruit the prospect 10 referrals and & Biz
c) Bring Appointments forward and over schedule		Better organised and manage the time they have when going for big promotions
d) Practice Presentation		Confidence booster New people to get started
e) Objection Handling		Online Third Party School bootcamp videos on Infohub
f) Workbook scripts		3 workbooks
g) Trakka Box system in place		Video training
h) Power Hours a week		How many per week with team
2 Presentations		
a) Introduction script		Hows your intro script out of 10 where 10 is perfect
b) 2 Steam Leads per 1st Appt		Learn Green card System
c) Enthusiastic Presentations		Number 1 reason why 2nd Appt isn't booked
d) Hot Button		To Recruit People – emotion displayed = IBA
e) Building Rapport		FORM- engagement comes from good questions
f) 2 Commitments		Said with Purpose (slowly with pauses and tie downs – IS THAT FAIR ENOUGH)
3 Fact Find completion		
b) Soft Notes		EVP2B
4 Answers to Objections		See above
5 Third Party Referral Script		Needs to be mastered for £100k pa & SVP
6 Referrals		
6a Mortgage Capsule		Mortgage cost reduction – 15 mins – leading to booking full 1st appt
Transition		
a) Yellow Memory Jogger		Learning this is predominantly a mindset issue not a training issue
b) Steering towards 5* Market		Teach them steering
c) 200 Total Referrals at all times		200 5 star referrals
d) Appointment Ratios		Full Time progression this is essential
7 Complete Online DCF		
a) Underwriting requirements		
b) Non-Disclosure		
8 10 White referral Cards		
a) Name		
b) Town		
c) Partner's Name		
d) Hobbies		
e) Best Friends		Super easy Warm market Low hanging fruit
f) Ambitious		FOCUS steer towards Winners
g) Enthusiastic		FOCUS steer towards Winners
h) Day Time		FULL timers to see people during the day
i) Top 2 highest Income Earners		Upgrade your market to higher earners

WORKSHEET 10A

Worldclass Checklist — continued

Skill	Marks /10	Notes
j) Steam		See above
k) 2 x Field Training		Gets people licensed
9 Travel Double		Duplicates your business
10 Go Getter as Minimum		
a) 3 Recruits		
b) £3000 of Premium		
11 Accountability		
12 Learn the Business Overview Meeting & Follow up Interview		Use the Green Card System to get the best 1–4 STEAM leads
13 3 Way WhatsApp to Referrals		Create straight after the referral cards are completed — scripts in the workbook, p38
a) Referral introduction text		Introduce your upline to each referral
b) 3 Way field training text		Recruit asks for help: witness 3–5 presentations
c) Homeowners — mortgage text		Mortgage time and money savings
d) Wills and trusts text		Protecting assets and the estate
e) Home insurance text		Saving money on home insurance
f) Reply in the group the same day		Step in, thank them, book the appointment
14 Third Party Carryback Close		The 2nd appointment — workbook p18–20
a) Carryback booked at the 1st appointment		Keep it short — within 7 days
b) Third Party Carryback Close script		Word perfect — p19
15 Green Card System		4 calls a day — workbook p39–42
a) Ask for their best two		The £2 million question — £2 million Restaurant
b) Complete the green STEAM card		Name, connection, STEAM
c) The green card call		Name check, connection, feed back, two options, alternative closing
d) The handoff		"You'll see [referrer] in the foyer" for the BOM
e) Track the ratios		83% / 46% / 59% — 8-week tracker
16 Phone Scripts		Booking, magic question, recruiting — workbook p43–47
a) Booking the Scoop (Smiley Track)		Third party's name in the first 10 seconds
b) The Magic Question		Finish every call with it
c) Recruiting call (ISTEAM Track)		Alternative closing
17 Welcome & Connection		The first seven days — workbook p27–31
a) Welcome call within 24 hours		Your voice, not a text
b) 3 Way WhatsApp intro within 48 hours		To their upline and trainer
c) F.O.R.M. and S.I.G.N.		Engagement comes from good questions
d) My story in 60 seconds		Tell it on every welcome call and BO
18 Identifying Winners		Find your winners — workbook p54–56
a) MECCAH		Market, Ethic, Coachability, Circumstances, Attitude, Hungry
b) My top two and my running mate		Named and agreed
c) GROW coaching		Lead, don't manage
19 Management Exchange		Replacement — workbook p57–60
a) Know the 3 EVP qualifications		6 directs (2 STLs and 4 TLs), 10x10, an acceptable exchange
b) Work depth in 2 or 3 legs		Depth becomes width
c) Exchange agreed with my EVP		Worksheet 8B — 2 STLs, 1 GL or 3 TLs
20 Weekly Rhythm & Recognition		Touch the business every day — workbook p63–67
a) Weekly scorecard & Trakka Box		Sent to my running mate every Friday
b) Friday 5pm Baseshop meeting		Every week
c) Recognition Tracker dated		Target date in every dark box — p67

Total score (out of 200): _____ **Next review with my upline (date):** _____

RISE ABOVE

My 12-Month EVP Plan

1 My roadmap

My EVP gap is ...

2 My maths

Every week I will book ...

3 My hard part

First, I will tackle ...

4 My date

I will be an EVP by ...

5 My welcome rule

Every new recruit gets ...

6 My reach

My two new engines are ...

7 My momentum

My 90-day calendar includes ...

8 My running mates

My top two and partner ...

9 My rhythm

Every day, week and month I ...

Signed _____ **Running mate** _____

Review dates — 30 days _____ **60 days** _____ **90 days** _____

WRAP UP
Leadership Redefined

My fellow Genistarians,

Failure is nothing but a few small errors repeated day after day. It is not a cataclysmic, sudden event — it is subtle. We do the same things that are killing our success day in and day out: wasting an hour here, letting a task go undone there, because we did the same things last month and nothing terrible happened.

Success is nothing but the result of a few disciplines repeated every day. Making that phone call, seeing that client, being on time, working out day after day. Disciplined actions create rewards.

So why doesn't everybody succeed? It's easy to do the little things that create success, but it's easier not to do them. I'll call that guy later; that client's probably busy, I won't go and see him; I'll work out tomorrow. And you can do that day after day — then one day YOU WAKE UP, you're 65, broke, and you've wasted a lifetime.

This has dawned on me over the last couple of days. Every single day, I can either take a few steps towards success and joy, or I can take a few steps towards destitution and misery.

NOTES

NOTES



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