



30-DAY NEW AGENT ACTION PLAN

A structured first-month roadmap for skill building and launch

This plan is designed to create momentum without promising a specific income result. Progress depends on licensing, contracting, activity, skill development, lead flow, client needs, carrier approval, and other factors.

Week 1 - Build the Foundation

- Confirm licensing status and outstanding state requirements.
- Complete agency / FFL onboarding instructions.
- Set up email, calendar, phone, workspace, and CRM/lead system.
- Begin carrier contracting and required training.
- Review the life insurance and final expense scripts.
- Complete at least 3 full role-plays.
- Study basic product categories and underwriting questions.
- Create a daily work schedule.

Week 1 Target

Be able to explain who you help, what you offer, and the basic sales process in simple language.

Week 2 - Learn the Sales Process

- Practice the opener, needs analysis, presentation, and close.
- Review objection responses.
- Learn how to use carrier underwriting guides.
- Practice quoting and e-application workflow in training mode where available.
- Observe experienced-agent training or call reviews.
- Create first lead/prospect follow-up plan.
- Begin compliant outreach once licensed/appointed as required.

Week 2 Target

Conduct a confident fact-find and know when to ask for help with underwriting or product selection.

Week 3 - Build Consistency

- Run scheduled prospecting/call blocks.
- Track dials, conversations, appointments, and applications.
- Follow up with every lead using a defined cadence.

- Review each completed appointment: what worked and what was unclear?
- Ask for coaching on difficult objections and underwriting cases.
- Study one product/carrier category each day.

Week 3 Target

Create a repeatable daily rhythm and reduce hesitation around prospect conversations.

Week 4 - Refine and Scale

- Review 30 days of activity numbers.
- Identify your best lead source / appointment times / communication channel.
- Identify your top three objections and strengthen those responses.
- Create a pending-case follow-up routine.
- Create a client service / policy-delivery routine.
- Set your next 30-day activity goals.
- If interested in agency building, begin learning the recruiting/onboarding process.

Week 4 Target

Know what your weekly schedule should look like and which skills you need to improve next.

30-Day Review

- Licensing / contracting complete for the products I intend to sell.
- I can explain the sales process from first contact through policy delivery.
- I use approved materials and understand core compliance expectations.
- I track activity every workday.
- I ask for coaching instead of guessing.
- I have a clear plan for my next 30 days.

Remember: Build skill before speed. Build trust before pressure. Put the family's needs first.