



# AGENT ONBOARDING CHECKLIST

From licensing through your first submitted business

Use this checklist from the day you decide to move forward through your first submitted applications.

## Phase 1 - Licensing

- Review resident-state licensing requirements.
- Enroll in required pre-licensing course.
- Complete pre-licensing course.
- Schedule state exam.
- Pass state exam.
- Complete fingerprints/background steps if required.
- Submit license application.
- Confirm license is ACTIVE before selling.

## Phase 2 - Business Setup

- Create professional email address.
- Set professional voicemail greeting.
- Set up calendar and appointment reminders.
- Choose a secure workspace.
- Create a basic daily schedule for training, calls, appointments, and follow-up.
- Set up secure document/password practices.
- Save agency contact information and support channels.

## Phase 3 - FFL / Agency Onboarding

- Complete required onboarding steps supplied by Jennise Housel Agency / FFL.
- Review independent-contractor expectations.
- Complete required platform/account setup.
- Complete carrier contracting applications.
- Track carrier appointment status.
- Complete required AML/product/suitability training.
- Save carrier agent numbers and portal logins after approval.

## Phase 4 - Sales Preparation

- Study the agency life insurance phone script.
- Study the final expense script.
- Review objection-handling guide.
- Review lead follow-up templates.
- Learn basic underwriting / health-question workflow.
- Learn how to quote accurately.
- Learn how to complete an e-application.
- Practice a complete appointment role-play.
- Review compliance and replacement rules.

## Phase 5 - Launch

- Obtain leads/prospects through an approved source or prospecting method.
- Create first call block.
- Book first appointments.
- Complete first needs analysis.
- Submit first application accurately.
- Confirm client understands premium, coverage, and next steps.
- Follow pending-case requirements.
- Schedule post-sale follow-up.
- Ask for coaching on your first cases.

## Weekly Review

- How many dials/outreach attempts did I make?
- How many conversations did I have?
- How many appointments did I set?
- How many appointments did I complete?
- How many applications did I submit?
- What objection or underwriting issue came up most often?
- What one skill will I improve next week?