

# Onboarding Pacing Guide

Agent Ready-to Sell Checklist

# Ready to Sell Process

## 1. Licensure

- a. Agents/Agencies must be licensed in all states in which we intend to sell.
- b. The process includes a prelicensure course, background check, and state exam.

## 2. Contracting

- a. All agents will initially contract with up to three carriers to get started.
- b. More can be added after completing all contracting and certifications.

## 3. Certification

- a. All carriers have required training and certifications.

## 4. Sales Training

- a. Our sales training process includes ongoing webinars, videos, and shared resources.
- b. Agents/Agencies will also have support and training direct from the carriers and from local carrier field managers.

## 5. Ongoing Support from the TLC and Erie Team

# Onboarding Pacing Guide & Checklist

## *Initial Onboarding Process*

**Typical Completion Time:** within 36 hours

**Recommended Completion Time:** within 4 business days

### Checklist

- ☐ Received Invitation Email for the Initial Onboarding Process.
- ☐ Completed all the steps in the Initial Onboarding Process.



# Onboarding Pacing Guide & Checklist

## *Contracting Forms and Paperwork*

**Typical Completion Time:** within 2 business days

**Recommended Completion Time:** within 7 business days

### Checklist

- ☐ Received initial contracting email from [contracting@tlcinsurancegroup.com](mailto:contracting@tlcinsurancegroup.com) and specific carriers as requested.
- ☐ Read each email/document carefully and followed all steps on each digital or paper contract.
- ☐ Maintained accurate records for each website address, username, and password.
- ☐ Completed all contracting provisions for each the carriers requested.

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# Onboarding Pacing Guide & Checklist

## *AHIP and Carrier Certifications*

**Typical Completion Time:** within 5 business days

**Recommended Completion Time:** within 7 business days

### Checklist

- ☐ Received an email with certification instructions from each carrier requested after completing each carrier's contracting.
- ☐ Completed all sections of AHIP ([use this link for a discount](#))
- ☐ Completed all carrier certifications saving each certificate of completion.
- ☐ Maintained accurate records for each certification website address, username, and password.

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# Onboarding Pacing Guide & Checklist

## *Ready to Sell Confirmation*

**Typical Completion Time:** within 2 weeks of starting the onboarding process

### Checklist

- ☐ After completing carrier certifications, you will need to confirm that you are “Ready to Sell” with each carrier.
- ☐ Some carriers will send you an email and others will indicate that you have completed all obligations.
- ☐ Please keep track of your completion (Ready to Sell Status) with each carrier.

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# Training and Coaching Stage

## *Learning the Process*

**Typical Completion Time:** Ongoing

### Checklist

- ☐ Now that you have completed the onboarding, contracting, AHIP, and certification process you should be ready to sell with each carrier.
- ☐ Please [click here to view current training sessions](#) that we have available for our Erie affiliates.
- ☐ Email us at [support@erie-tlc.com](mailto:support@erie-tlc.com) if you want to schedule a customized training session.

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