Fill in calendar with training topics for three hours each week. See subjects on page two. The days and hours you choose for the example are not binding. Submit the calendar along with the other required documents. Be sure to fill in 3 hours of material for each of the four weeks. See sample calendar for reference.

List the name of your business and the standard hours of operation for your business here:

August 2022

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Instructions: Assuming mentors are providing direct instruction to students for at least 3 hours per week, list the topics you would cover in weeks 1, 2, 3, & 4. The days and times on this example are just for demonstration purposes, based on RFP sub-header 3.3 **Mentor brokers will ensure the student brokers are proficient in the following areas by the end of the three-month mentor program.** (Continues on next page)

- Please also **list the name of your agency and your business's standard hours of operation somewhere on this calendar worksheet**.
- Assumes the student broker will be in the office at least 7 hours per week.
- Topics to be Taught:
  - **<u>Mentor Brokers to Ensure Student Proficiency in:</u>**
    - How to conduct a sales presentation to a client for all lines of business within Health and Life. (Example: on-exchange individual & SHOP, off-exchange individual and group)
    - How to compare plans for clients
    - How to conduct sales calls, including cold calls, and how to generate leads
      - Allow the student brokers to observe sales transactions
    - How to manage a book of business and how to keep records.
    - How to keep client information safe and secure
    - How to use sales software
    - How commission payments work
    - The different types of life and health products sold by the mentor broker
    - How to get appointed to carriers for life and health business
    - How to enroll new health insurance clients – individual and group
    - How to navigate the carrier portals
    - How to read benefit summaries (EOB) Evidence of Coverage (EOC)
    - How to examine Drug Formularies as they relate to different health plans

  - **<u>Additional Areas Mentor Brokers May Support the Growth and Development of Student Brokers:</u>**
    - Coaching on professional appearance and behavior
    - Providing student brokers with access to trainings offered by the carriers
    - Training student brokers on how to use calculators, screening and forecasting tools

  - **<u>Commitments and responsibilities to the Student Brokers</u>**
    - Student brokers are expected to be in the office or conducting agency business for at least 7 hours per week.
    - The mentor broker or mentor broker's designee must provide at least three hours of direct instruction to the student broker per week. The broker or broker's designee may meet with trainees individually or in small groups.
    - Mentor brokers are expected to take on no more than 5 students during the three-month mentor program so that each student may receive adequate attention and training.
    - Mentor Brokers will submit evaluations for each student broker on Friday morning of weeks 2, 4, 6, 8, 10 & 12.