

Service Providers

Back Office

<p>1. Send Assessment Request (NAAP APP) (save link) (Agent portal) (orca.life/new)</p>	<p>1. Receive Assessment Request</p>
<p>2. After Recommendation from Chris Derry, and position accepted. FILL OUT FULL NAAP SHEET</p> <p>*Make sure commission and all info is correct check with upline before sending</p>	<p>2. Add personal email to Constant Contact -> Send Assessment.</p> <p>3. Forward Assessment Request to Trainer CC upline</p> <p>4. Update Chris Derry Assessment Spreadsheet.</p>
<p>3. Obtain license – Upline/management communicate with Contracting@ORCA.Life, that Producer has passed for resident license.</p>	<p>5. Complete Scott & Glenn New Hire Process Spreadsheet. (lead/production projections) (Store hierarchy, commission, address, phone, personal email)</p>
<p>4. Complete all steps in welcome letter.</p> <p>1)(Send commission form, Photo, license to Contracting@ORCA.Life)</p> <p>2)(Create SuranceBay Profile/Assurant Appointment)</p> <p>3)Attend Friday Orientation.</p>	<p>6. Create ORCA Email ->Send credentials to personal email. (Use ORCA Email credentials to sign into MindTickle and Activate SuranceBay profiles...Keep your business separate from personal)</p> <p>7. Add to MindTickle & Send Welcome Letter. (Both to ORCA Email and SuranceBay)</p>
<p>5. SAVE passwords & login. Even from welcome letter. – Contact list.....Production / Leads/ etc...</p>	<p>8. After notified - Resend Welcome Letter to ORCA Email</p>
<p>6. START KNOCKING!!</p>	<p>9. After commission, photo license received. We will THEN review appointment request through SureLC to submit to Assurant.</p>
<p>10. Create Folder for all documents</p>	<p>10. Create Folder for all documents</p>
<p>11. Create ORCA Life Website / Lead Account (Email Carrie for LA update)</p>	<p>11. Create ORCA Life Website / Lead Account (Email Carrie for LA update)</p>
<p>12. Send all login credentials to ORCA Email.</p>	<p>12. Send all login credentials to ORCA Email.</p>
<p>13. Add to Texting service and Email Groups (ELP/PFL/Leadership), Teams list for Production.</p>	<p>13. Add to Texting service and Email Groups (ELP/PFL/Leadership), Teams list for Production.</p>
<p>14. Order ID Badge & Business Cards (Add to Barb's list to send supplies & New Agent Boxes)</p>	<p>14. Order ID Badge & Business Cards (Add to Barb's list to send supplies & New Agent Boxes)</p>
<p>15. Obtain writing number – Fill in spreadsheet.</p>	<p>15. Obtain writing number – Fill in spreadsheet.</p>