

The 5-Step Onboarding Blueprint To Get New Producers to Profit Faster



Because gambling on new hires is not a strategy.

Why Most Producers Fail — And the Proven Blueprint to Fix It

Hiring producers is one of the most expensive and high-stakes moves an agency makes — and most do it without a system to help them succeed.

No sales process.

No niche focus.

No clear accountability.

The result?

Slow ramp-up... Missed goals... Random outcomes.

This blueprint fixes that — with a simple 5-step process to get producers focused, building pipeline, and moving toward profit faster.

A system — not hope.

STEP 1: Goal Clarity

The Foundation of Motivation, Accountability, and Performance

Most producers don't fail because they're lazy.

They fail because they're unclear on what they're working toward.

Your job as the leader isn't just to give them a sales number—it's to help them find their number. One that actually means something to them.

◆ Start with life-first planning:

When it's time to hang it up, what kind of life will they look back on?

- Did they get to pay for the cars, the colleges, and the weddings for their children?
- Did they get to take the trips, drive the nicer vehicle, or upgrade the home—because they wanted it?
- Did they get to live the life they imagined, or just grind for 30 years and hope for the best?



Goal Clarity Continued

This conversation isn't about pie-in-the-sky dreams—it's about anchoring producers to real goals they care about.

And here's the truth: It's not about how much you make.
It's about how much you save.

If they're not saving, they're not building freedom.

So the income target must support the lifestyle and fund retirement—so they can continue living well even after production stops.

◆ From life goals to business goals:

Once they've mapped that desired life, work backward:

- What kind of personal income do they need to achieve it?
- Based on your comp structure, what amount of new business revenue will drive that income?

That becomes their 3-Year Plan.

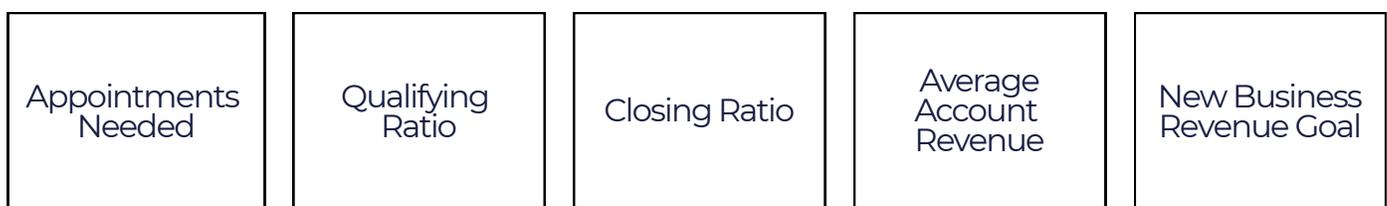
◆ Break it into a 12-Month Goal:

- How much new business do they need this year?
- What's the average revenue per account?
- How many accounts does that require?
- What activity needs to happen daily and weekly to get there?

Now it's a real target—not wishful thinking.

◆ Track it with 5 KPIs:

To hold them accountable, measure:





Goal Clarity Continued

When producers understand that their income fuels their future, and their future depends on their activity today, everything changes.

They're no longer working your plan.

They're working theirs.

And that's where accountability sticks—and performance scales.

STEP 2: The Sales Call Process

Build Confidence. Sound Like a Pro. Win More Business.

The number one reason they hesitate to dial, freeze on a cold call, or fumble through a prospect meeting is simple: they lack a process they believe in—and have practiced. That's your job to fix.

◆ **Hardwire the sales call process:**

Your team needs a structured, repeatable call process that's been pressure-tested.

Not some loose ideas. Not "just be yourself."

A real, step-by-step flow for navigating sales conversations with confidence.

◆ **Practice harder than you play:**

You want your producers to sound like professionals?

Then treat this like a performance.

- Write it out.
- Role-play real objections.
- Drill it until it's automatic.

Even the top athletes in the world practice more than they play.



The Sales Call Process Continued

Why should your sales team be any different?

◆ Record and review:

Don't just role-play—film it.

Then sit down and review:

- How do they sound?
- What's their body language like?
- Are they clear? Convincing?
- Or would you want to get off the call?

If they're not sharp, go again. And again. Until it's crisp.

When your producers know what to say—and they've said it 50 times in practice—they make the calls, book the meetings, and close the business.

Confidence isn't optional.

And it isn't natural.

It's built—through process and repetition.

STEP 3: Build the Prospect Bank

Pick Your Battles. Pre-Qualify. Stop Chasing Ghosts.

The #1 reason producers waste time?

They don't know where to play.

So they chase everything—and win nothing.

You want a producer who's dialed in, focused, and writing meaningful business?

Then you need to help them build a real prospect bank. One that's niche-driven, targeted, and pre-qualified.

This is how you stop random activity and start creating momentum.



Build the Prospect Bank Continued

◆ Start with 1 to 3 Niches:

Ask:

- What industries do they already understand from past work experience?
- What do they enjoy learning about?
- What keeps them engaged, curious, and willing to stay in the game long enough to win?

You're not just picking verticals—you're choosing playing fields they'll commit to.

Focus isn't limiting. It's liberating.

◆ Match the niche to your market:

- Are those industries active and accessible in your geographic area?
- Do they produce the right revenue per account?
- Can they support the producer's income goals?

If the math doesn't work, it's not a niche. It's a distraction.

◆ Build a real list (not a wishlist):

Once the niche is set, build a bank of 200–300 pre-qualified prospects:

- Estimate the account revenue
- Confirm it fits your underwriter's appetite
- Understand the top problems that buyer is facing
- Know the key competitors — and where they're strong or weak

Pre-qualified doesn't mean perfect. It means worth the effort.

Without a clear target list, producers drift.

They chase garbage accounts, run in circles, and start believing they're "doing the work" when all they're doing is staying busy.

A strong prospect bank removes the guesswork.

It builds pipeline confidence.

And it turns prospecting from random chaos into intentional action.

STEP 4: Teach Differentiation

If They Don't Know What Sets You Apart, Neither Will the Buyer



Most producers lose before they ever walk in the door—because they sound like everyone else.

“We have great service.”

“We care more.”

“We’ll save you money.”

None of that is differentiation.

And buyers have heard it all before.

The reality?

Your agency is already doing things that create massive value for clients—proactive services, resources, processes—that your producers are failing to take credit for.

This isn't about making up a story.

It's about finally learning how to communicate what's already true.

◆ Identify the Proactive Value You Offer:

Help your producers ask:

- What do we do for clients before something goes wrong?
- What resources, services, or strategies do we provide that clients actually benefit from—but we've never really called out?
- What gaps do we close that most buyers don't even realize their current agent is ignoring?

The goal: Create a list of 10 to 12 meaningful differentiators—the real things your agency does that most competitors aren't doing, don't do well, or don't talk about.

◆ Teach Them How to Use It:

It's not enough to know the list. Producers must learn how to:

- Bring these differentiators into conversations with buyers
- Ask questions that make the buyer realize the incumbent has left things undone
- Position your agency as the one who solves those gaps—proactively, predictably, and consistently

STEP 5: Master Appointment Setting

Get the Meeting. Sell Your Value. Stop Chasing.



If your producers can't confidently get the meeting, they'll never get the chance to sell. This isn't about scripts. It's about knowing how to communicate a problem the buyer actually cares about — in a way that earns the conversation.

5-Part Formula for Appointment Setting:

1. Craft the Bold Statement

The opener that punches through the noise.

It's niche-specific, pain-driven, and problem-focused. It answers:

"What's the biggest pain your prospect has — and how do you help solve it?"

Formula:

"I help [target prospect] [solve painful problem]. Is this an okay time to talk?"

Every producer needs a Bold Statement for every niche they work in. No generic garbage. It has to be dialed into the world that buyer lives in.

2. Prepare for the Knee-Jerk Response (KJR)

No one's sitting around waiting for a sales call. The moment a prospect feels "sales," they hit you with a reflexive brush-off.

- "We're good."
- "Not interested."
- "Send me something."

Your producers must learn how to disarm KJRs, not by arguing — but by staying calm, acknowledging it, and steering right back to the problem.

3. Sell the Meeting (Not Yourself)

This is the make-or-break point.

The goal is NOT to pitch insurance. The goal is to communicate the value of the conversation itself.

Sell the Meeting (Not Yourself) Continued

Make it about them — their risk, their pain, their gaps — not your products, your company, or your bio.

Language shift:

✗ “I’d love to come by and tell you about us...”

✓ “We should talk. It seems like there may be some things worth exploring if what I’m seeing in your industry applies to you.”

4. Close for the Appointment

Get to the ask — clearly, confidently, without dancing around.

“I don’t suppose it would make sense to sit down and talk about what might work for you?”

If they say yes — get it booked.

If they hesitate — go back to the pain and reinforce the reason for the conversation.

5. Assign Homework to the Buyer

This is where the game changes.

Before the meeting, ask them to reflect on:

- “What’s working in your risk management program?”
- “What do you wish was working better?”
- “Who are you working with now, and for how long?”

This primes the buyer. It gets them thinking about their gaps before you ever show up.

When you walk in, they’re not just meeting with a salesperson — they’re engaging with a problem-solver.

When producers have a message that’s clear...

When they know how to handle resistance...

When they know how to sell the value of the meeting...

Prospecting gets simple. Appointments get booked. Pipelines stay full.

This is the system we teach inside our program.

Simple. Proven. Repeatable.

Want to see how this could work in your agency?

Let’s have a conversation about what’s working, what’s not, and whether Bignition and our training are a fit to help you onboard, train, and develop producers who win.

