

# USER GUIDE

## SENIOR LIFE RECRUITING

Sounds great! Just booked my interview.

See you at 10:30.

Your interview with Doug Blake is all set. We are excited to talk with you on August 5th at 10:30 AM. You'll be meeting with one of the best leaders we have.

Here's a little bit about them:  
<https://msgsndr.com/l/tcvWx39tg>

Your call with Doug is in 15 minutes! 🔥🔥

Thanks for the call.

Looking forward to continuing on August 8 at 1 PM.

It sounded like the opportunity was important to you. Here's a video:

[https://trigger\\_link.qnlkwnXJFB](https://trigger_link.qnlkwnXJFB)

Thanks for the call! You can register for our course here: <https://msgsndr.com/l/tcvWx39tg> to sign up for your online course. You can complete it in as little as 20 hours.

<https://msgsndr.com/l/tcvWx39tg>

We've sent a complete list of instructions on how to register to your email. Make sure to check it out!

Thanks for applying to Senior Life!

Please take 90 seconds to watch a video to see if you'd like to work with one of our top leaders.

<https://msgsndr.com/l/tcvWx39tg>

I have a quick question. Are you available?

Sounds great! Just booked my interview.

Please go to <https://msgsndr.com/l/tcvWx39tg> and use the code 123456 to complete your registration.

Your interview with Doug is all set.

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To access walkthrough videos & frequently asked questions, please visit our site at <https://seniorlifeagents.com/recruiting-portal-walkthrough>.

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# THE DASHBOARD

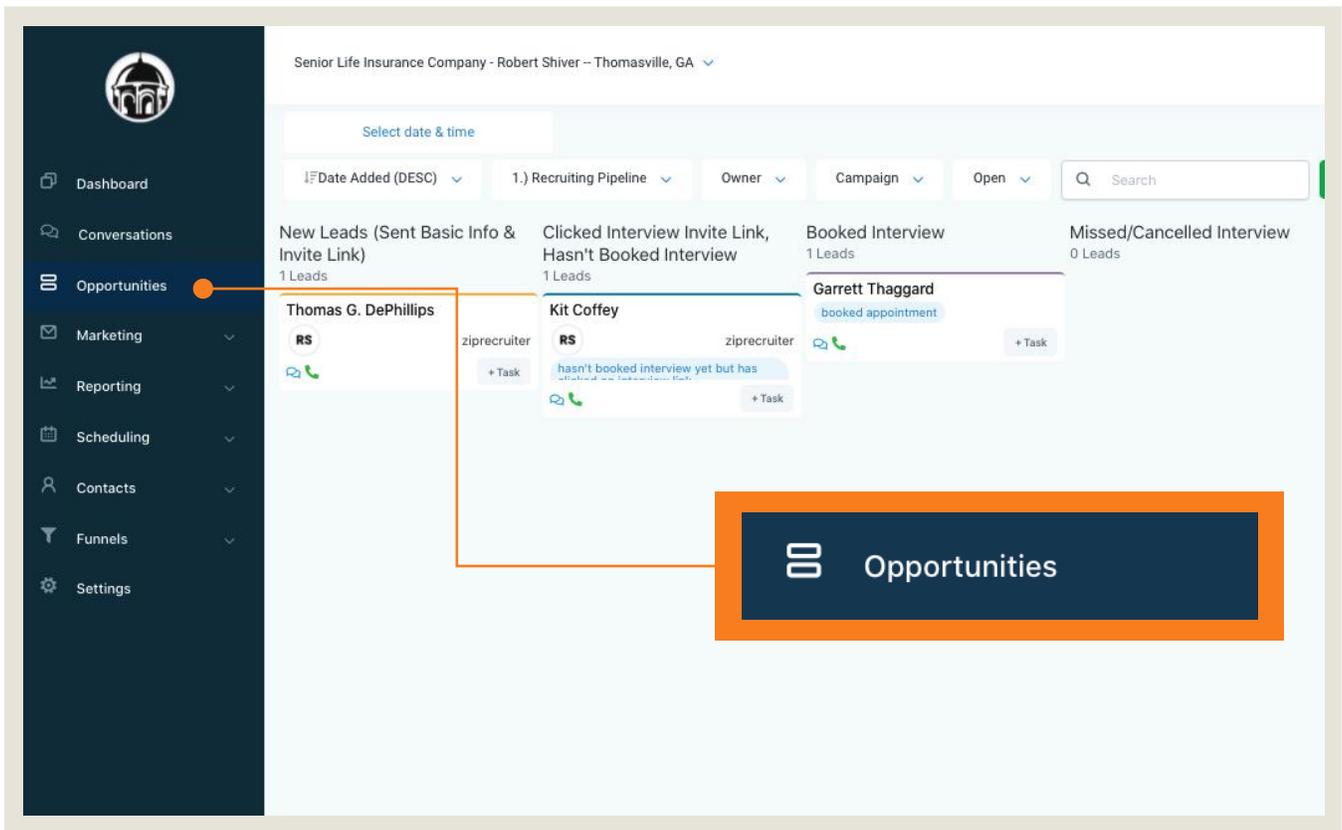
The screenshot displays a CRM dashboard for 'Senior Life Insurance Company - Robert Shiver - Thomasville, GA'. The navigation menu on the left includes: Dashboard, Conversations, Opportunities, Marketing, Reporting, Scheduling, Contacts, Funnels, and Settings. The main content area shows 'Opportunities' with a count of 3 for the period Jul 11, 2021 - Jan 12, 2022. Below this, there are sections for 'Conversion Rate' (0.00%) and 'Stages Distribution' (1.) Recruiting Pipeline (3). The 'Stages Distribution' is visualized with a pie chart and a legend. A callout box with an orange border highlights the 'Dashboard' tab in the navigation menu.

Opportunity Status	Count
Closed	0
Open	3
Lost	0

Stage	Count
(1) New Leads (Sent Basic Info & Invite Link)	33.33%
(1) Clicked Interview Invite Link, Hasn't Booked Interview	33.33%
(1) Booked Interview	33.33%
(0) Missed/Cancelled Interview	0.00%
(0) Follow Up - General	0.00%
(0) Follow Up - Leads	0.00%
(0) Follow Up - Freedom & Flexibility	0.00%
(0) Follow Up - Financial Gain	0.00%
(0) Follow Up - Growth Opportunity	0.00%
(0) Follow Up - Making A Difference	0.00%
(0) Not A Good Fit	0.00%

To access your dashboard, click on the “Dashboard” tab, which is located on the navigation portal on the left side of your screen. Your dashboard is a basic breakdown of all the different stats related to your campaign. From here, you can see how many recruits you have contracted and a rundown of how many different campaigns you’ve sent out through our automation.

# OPPORTUNITIES



Under the “Opportunities” tab, you’ll find your entire recruiting pipeline, from beginning to end. The second that a recruit applies to work with you, their information will be automatically placed under the “New Leads (Sent Basic Info & Invite Link)” column. As they click on the link and book their interviews, the system will automatically move them into the appropriate column.

Below is a complete breakdown of each column.

## New Leads (Sent Basic Info & Invite Link)

The second that a recruit applies to work with you, their information will be placed in this column. This triggers a campaign to the recruit that invites them to book an interview with you. The recruit will only be able to pick a time from the hours you’ve designated.

## **Clicked Interview Link, Hasn't Booked Interview**

Once your recruit has clicked on the interview link, they will be automatically transferred to this column. If they do not book an interview afterwards, they will be sent follow-up reminders to book an interview with you.

## **Booked Interview**

Once your recruit has booked their interview, they will be automatically transferred to this column. This triggers a campaign that provides an interview confirmation. Reminders about the interview will also be sent to the recruit.

## **Missed/Cancelled Interview**

If your recruit misses or cancels their interview, you will need to move them to this column. You can do this by holding your mouse down on their card and dragging it over. This triggers a campaign asking the recruit to reschedule.

## **Follow Up - General | Follow Up - Leads - | Follow Up - Freedom & Flexibility | Follow Up - Financial Gain | Follow Up - Growth Opportunity | Follow Up - Making A Difference**

Once you've interviewed the recruit, if you feel that they aren't quite ready to be sent to XCEL (our licensing course) or to contracting, you can move them to one of these columns to trigger a follow-up campaign.

"Follow Up - General" will sent a general follow-up campaign to the recruit, but if the recruit mentioned leads, freedom & flexibility, financial gain, or any of the other categories listed above during your call, you can move them to one of these columns instead. This will sent a video specifically focused on that content to the potential recruit.

For example, if you've spoken to a single mom that's really excited for a career where she will gain the freedom to determine her own schedule, but isn't quite ready to become licensed or contracted, you can move her to "Follow Up - Freedom & Flexibility." This will send a video specifically targeted to her & an invitation to follow up with you.

## **Not A Good Fit**

If you've spoken to the recruit and have decided that they may not be the best fit for you and your team, please move them to the "Not A Good Fit" column. This triggers a campaign letting them know that they aren't a good fit at this time, but invites them to apply again in the future.

## **Send to XCEL**

If your recruit is ready to join your team but they haven't gotten their life insurance license yet, you can move them to this column. This triggers a campaign that sends them information regarding our XCEL course, which helps agents become licensed.

## **XCEL Registration Confirmed (Send Course Completion Checkups)**

You will need to check in with your recruit & ensure that they have signed up for XCEL. Once you have confirmed their registration, please move them into this column. This will trigger follow-up reminders to complete the course & become licensed.

## **Send to Contracting**

Once your recruit has become licensed (or if you're speaking to a recruit that's already been licensed) and they are ready to become a part of your team, move them to this column. This triggers a campaign sending them a link to the contracting site. It also provides your contracting code & instructions on how to use the site.

## **Hired**

Once you've received confirmation that your recruit has been hired to your team, congratulations! It's time to move them to the "Hired" column. This will trigger a campaign welcoming the agent to your team.

# MARKETING

The screenshot displays a CRM interface for 'Senior Life Insurance Company - Robert Shiver -- Thomasville, GA'. The left sidebar contains a navigation menu with items: Dashboard, Conversations, Opportunities, Marketing (expanded), Campaigns (highlighted with an orange circle), Reporting, Appointment Report, Scheduling, Contacts, and Settings. The main content area is titled 'Customer Acquisition' and 'My Campaigns'. It features a section 'Get More Customers' with a descriptive text: 'Customer acquisition campaigns help you to produce more "hot" sales leads who are ready to engage.' Below this is a table with columns: Name, Total, Active, Completed, Replied, and Reply %.

Name	Total	Active	Completed	Replied	Reply %
▼ 1. NEW LEADS - INTERVIEW INVITE (3)					
New Lead: Interview Invite	2	1	1	0	0.00%
New Lead: Interview Invite - Said No to Name Question	0	0	0	0	0.00%
New Lead: Interview Invite - Said Yes to Name Question	0	0	0	0	0.00%
▶ 2. CLICKED ON INTERVIEW INVITE LINK, HASN'T BOOKED INTERVIEW YET (1)					
▶ 3. CALENDAR BOOKINGS (3)					
▶ 4. POST-INTERVIEW FOLLOW UP CAMPAIGNS (7)					
▶ 5. MOVE TO HIRE (3)					
▶ 6. HIRED AGENT/SENT TO CONTRACTING (1)					
▶ MISC. (1)					

An orange callout box on the right highlights the 'Marketing' menu item and the 'Campaigns' link within it.

Under the “Marketing” tab, you’ll find a link called “Campaigns.” By clicking on “Campaigns,” you’ll see all of the campaigns that are a part of your portal’s automated system. It is recommended for you to read these campaigns so that you’re familiar with the information being sent out through your portal, but you will not be able to edit this information.

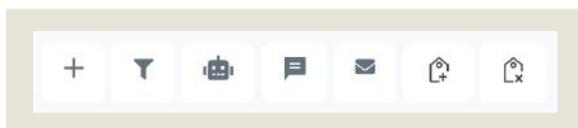
These campaigns are organized by folders. Click on each folder to see the campaigns in each category. Click the campaign name to see the details for each campaign.

# CONTACTS

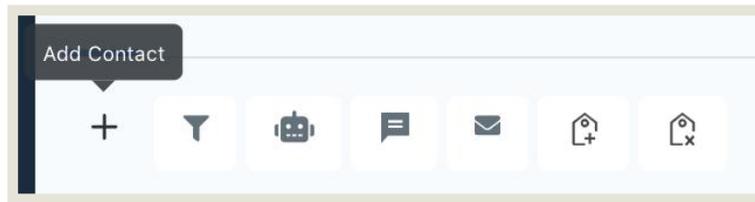
The screenshot shows a CRM interface for 'Senior Life Insurance Company - Robert Shiver - Thomasville, GA'. The main view displays a list of contacts with columns for Name, Phone, Email, Created, and Last Activity. Three contacts are listed: Garrett Thaggard, Kit Coffey, and Thomas G. Dephillips. A sidebar on the left contains navigation options: Dashboard, Conversations, Opportunities, Marketing, Reporting, Scheduling, Contacts, and Settings. The 'Contacts' menu is expanded, showing sub-options: 'Contacts / Smart lists', 'Manual Actions', and 'Contact requests'. A callout box highlights this expanded menu.

	Name	Phone	Email	Created	Last Activity
<input type="checkbox"/>	GT Garrett Thaggard	(229) 228-4141	gthaggard@srlife.net	Jan 11 2022 11:18 AM (EST)	6 hours ago
<input type="checkbox"/>	KC Kit Coffey	(757) 232-0342	kitridge.coffey@gmail.com	Jan 11 2022 09:50 AM (EST)	4 hours ago
<input type="checkbox"/>	TD Thomas G. Dephillips	(234) 380-5333	tomdephillips@yahoo.com	Jan 10 2022 08:46 PM (EST)	8 hours ago

Under the “Contacts” tab, you’ll find a link called “Contacts / Smart Lists.” By clicking on “Contacts / Smart Lists,” you’ll see all of the contacts that have been imported into your system so far. Here, you can sort them by last activity or by the date they were imported in the system.



You will also see a couple of different icons above the contacts list (depicted left). You can use these tools to organize any contacts in bulk if needed.



## Adding Contacts

Your portal automatically imports anyone that applies through one of your recruiting campaigns (through Facebook, ZipRecruiter, etc), but if you ever have the need to add a contact into the system yourself, you can do that here. You can only add one contact at a time. However, it is extremely important to have written consent to contact them.

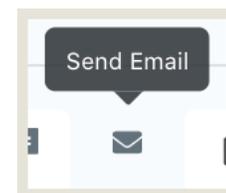
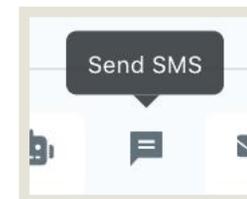
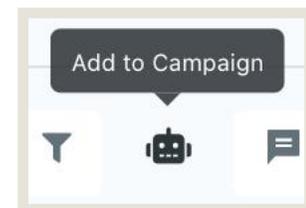
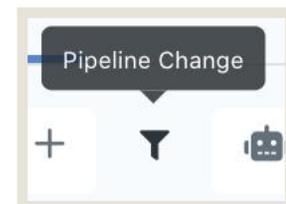
**Severe legal complications can arise from adding any contacts that haven't explicitly given you permission to contact them by phone and by email. Do not add any contacts that you do not have written consent to contact.**

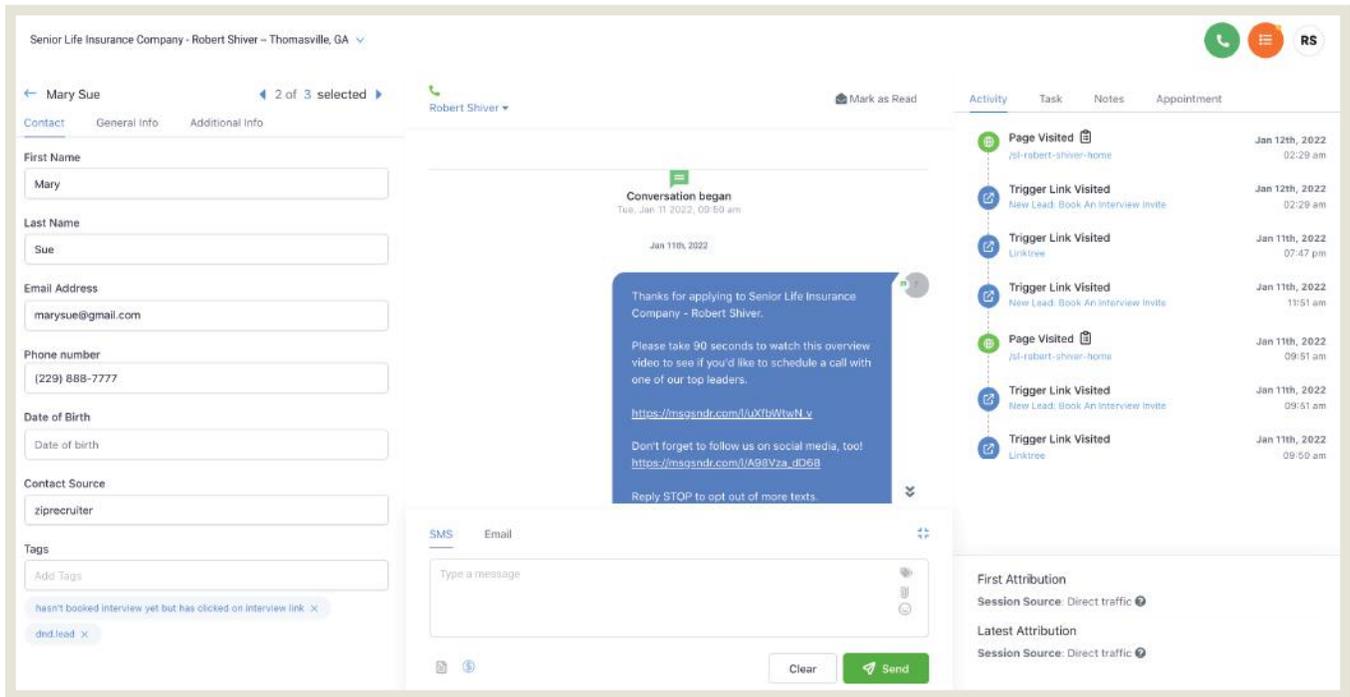
## Bulk Editing

The other tools allow you to bulk edit contacts.

For instance, if you need to move multiple contacts down the recruiting pipeline, you can check the boxes next to their names & click on the "Pipeline Change" button. This will allow you to move multiple contacts at once along the pipeline (the recruiting pipeline is the different columns in the "Opportunities" tab).

Moving contacts to different stages with the pipeline will trigger the corresponding campaigns, and vice versa. For example, if you add the XCEL campaign to a contact, it will be automatically moved to the XCEL column.



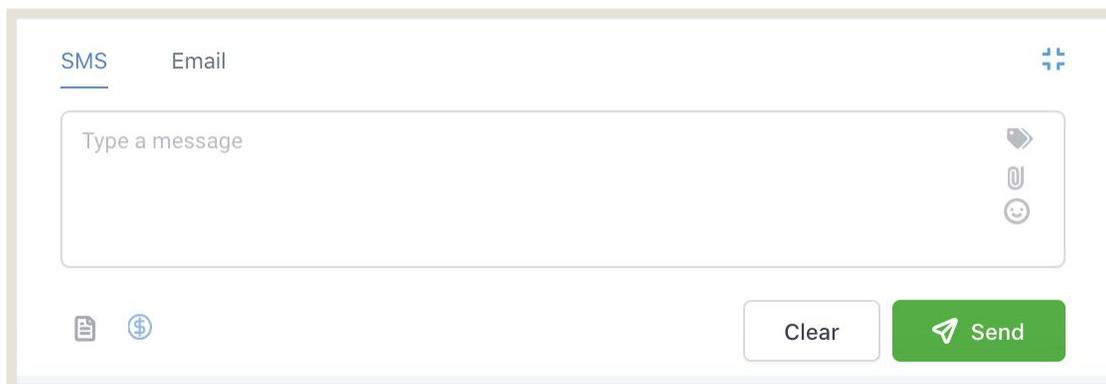


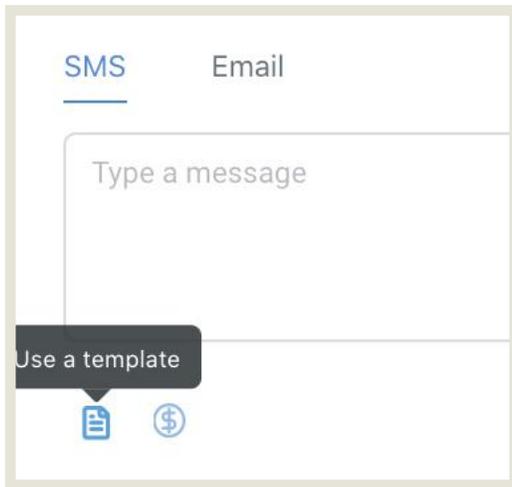
## Individual Contact Page

By clicking on the name of the person that you'd like to see more information of in the contacts list, you can access this page.

On this page, you can see the history of the messages that you've sent to that particular contact. You can also see all of that contact's information and all of the activity for that contact. By clicking on "Notes," you can even add notes about that contact.

By clicking on the SMS/Email panel, you can respond to any questions that the contact may ask and send your own messages back and forth via text and email.





## Sending Custom Templates

If you've set up custom text or email templates for yourself (the steps for this are described on page 20), then you can send those from the SMS/Email panel. Just click on the "Use A Template" icon.

## Additional Info

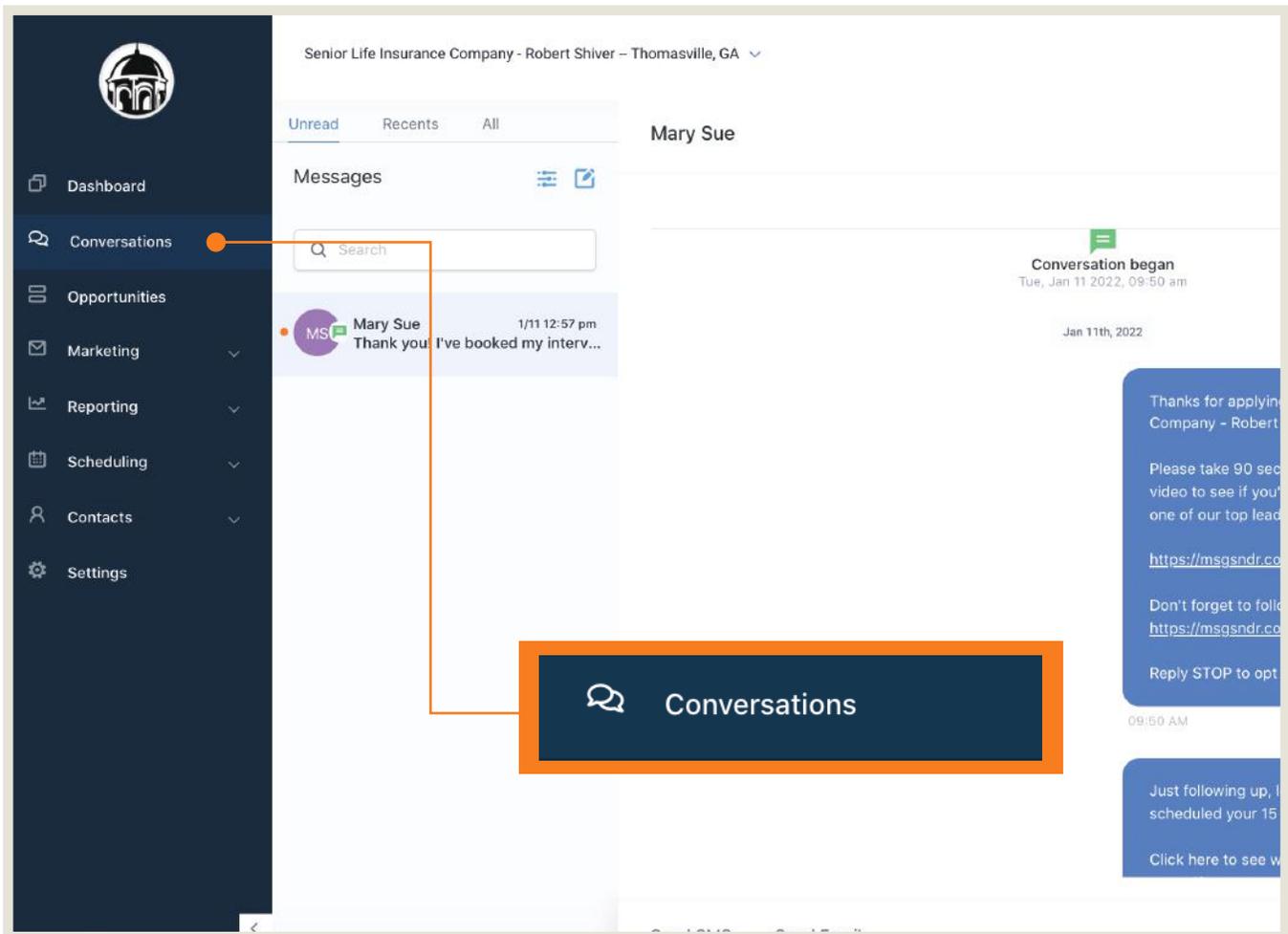
After your recruit has booked their interview, they are redirected to a pre-interview questionnaire. If they fill out this form, all of the answers that they submit will be populated under the "Additional Info" tab on the Contacts tab.

This will give you additional information about your recruit before your interview. Check this tab to see if the recruit is already licensed, if they've submitted a resume, etc.

A screenshot of a mobile application interface showing the 'Additional Info' tab for a contact named 'Mary Sue'. The top of the screen shows a back arrow, the name 'Mary Sue', and a selection indicator '2 of 3 selected'. Below the name are three tabs: 'Contact', 'General Info', and 'Additional Info' (which is selected and underlined). The main content area contains several questions and input fields:

- A checkbox labeled 'Hide Empty Fields'.
- A question: 'Have You Been Convicted Of A Felony Or Any Other Crime In The Last 10 Years? Please Be Honest. We Just Want To Make Sure That We Can Get You Appointed.' Below it is a dropdown menu with the text 'Please select an option.' and a downward arrow.
- A question: 'Are You Seeking A Part-Time Or Full-Time Position?' Below it is a dropdown menu with the text 'Please select an option.' and a downward arrow.
- A question: 'Do You Have A Life Insurance License? (If You Don't, No Worries! We'll Help You With This Process).' Below it is a dropdown menu with the text 'Please select an option.' and a downward arrow.
- A question: 'Please Sign Below To Authorize Senior Life To Contact You Via Phone Or Text About This Position.' Below it is a text input area with the placeholder text 'If so, please tell us about your experiences.' and a small icon in the bottom right corner.
- A question: 'Do You Currently Have A Life Insurance License?' Below it is a dropdown menu with the text 'Please select an option.' and a downward arrow.

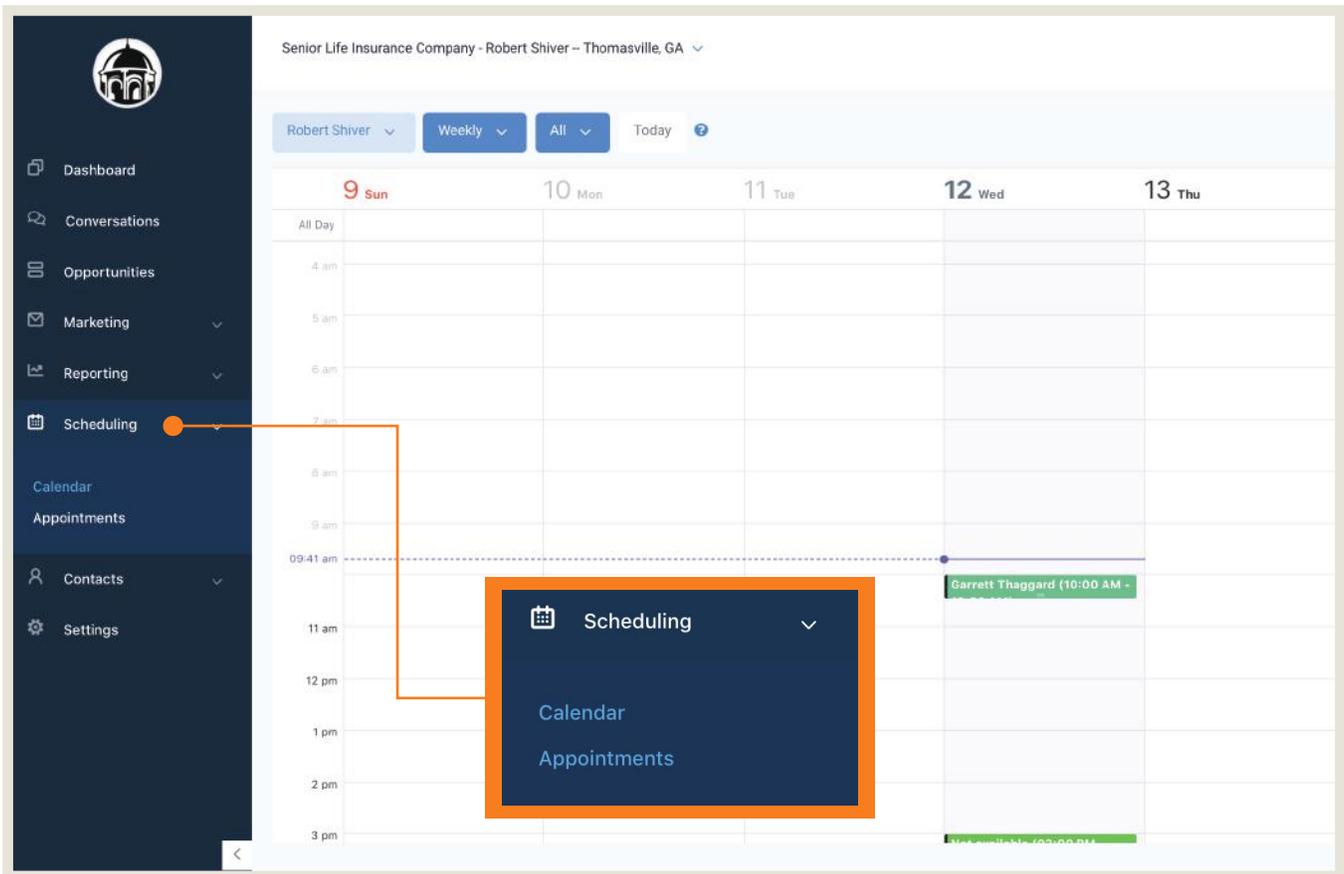
# CONVERSATIONS



By clicking on the “Conversations” tab, you will see an overview of all the of the conversations that you’ve had with your recruits. You can filter by unread, recents, and all messages. This tab is great for when you’re checking messages on the go.

You can send responses, check a contact’s information, and add campaigns to specific contacts from this tab as well.

# SCHEDULING

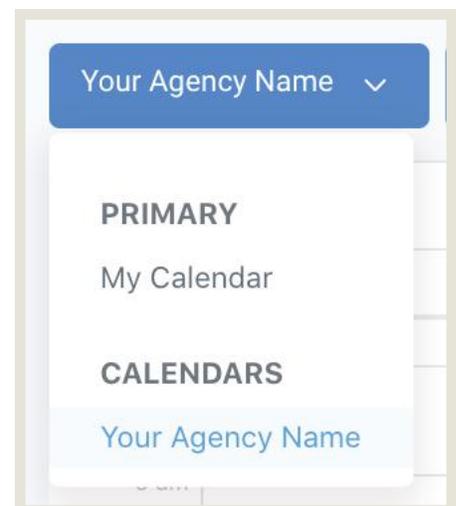


By clicking on the “Scheduling” tab, you will see two links— “Calendar” & “Appointments.”

## Accessing Your Calendar

In order to view your calendar, click on the “Calendar” link under the “Scheduling” tab.

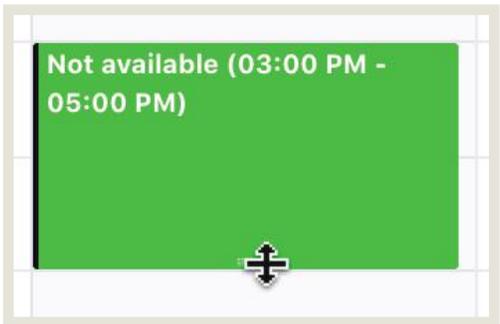
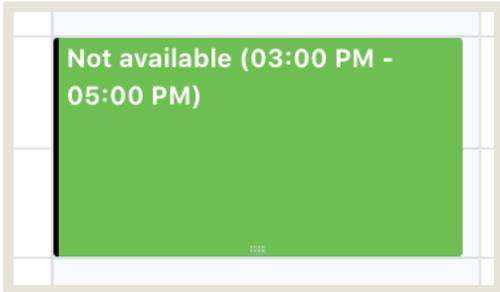
**Once you’re here, you must click on the dropdown at the top and select the calendar for your agency (the default option is “My Calendar,” which will not show your appointments).**



## Block Off Time Slots

There may be times when you want to block off time slots without affecting your usual hours of availability. You may have a lunch meeting, a doctor's appointment, or a vacation scheduled during a time when you would typically be available.

You can do this by double clicking or double tapping on the spot on the calendar that you'd like to block off. This will cause a block that says "Not Available" to appear.



## Adjusting Your Blocked Off Time Slot

To adjust the amount of time that you've blocked off if you're on a desktop, you can hover over the top or the bottom of the box that's appeared.

You will see a cursor with two arrows appear. Click & hold down to drag the box to cover more or less of the calendar.

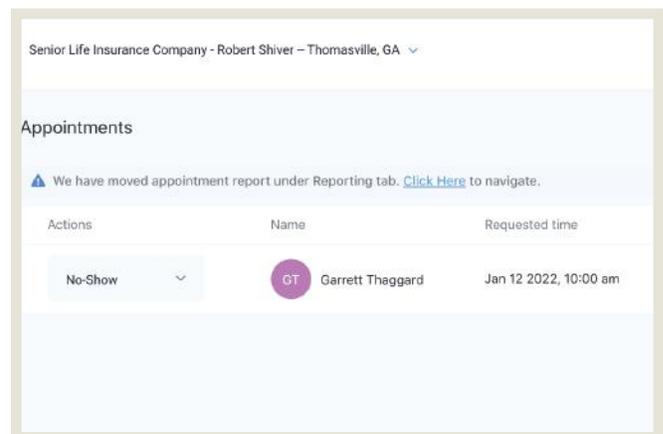
On mobile, you can adjust this by holding down the top or the bottom of the box and dragging it in either direction.

## Appointments

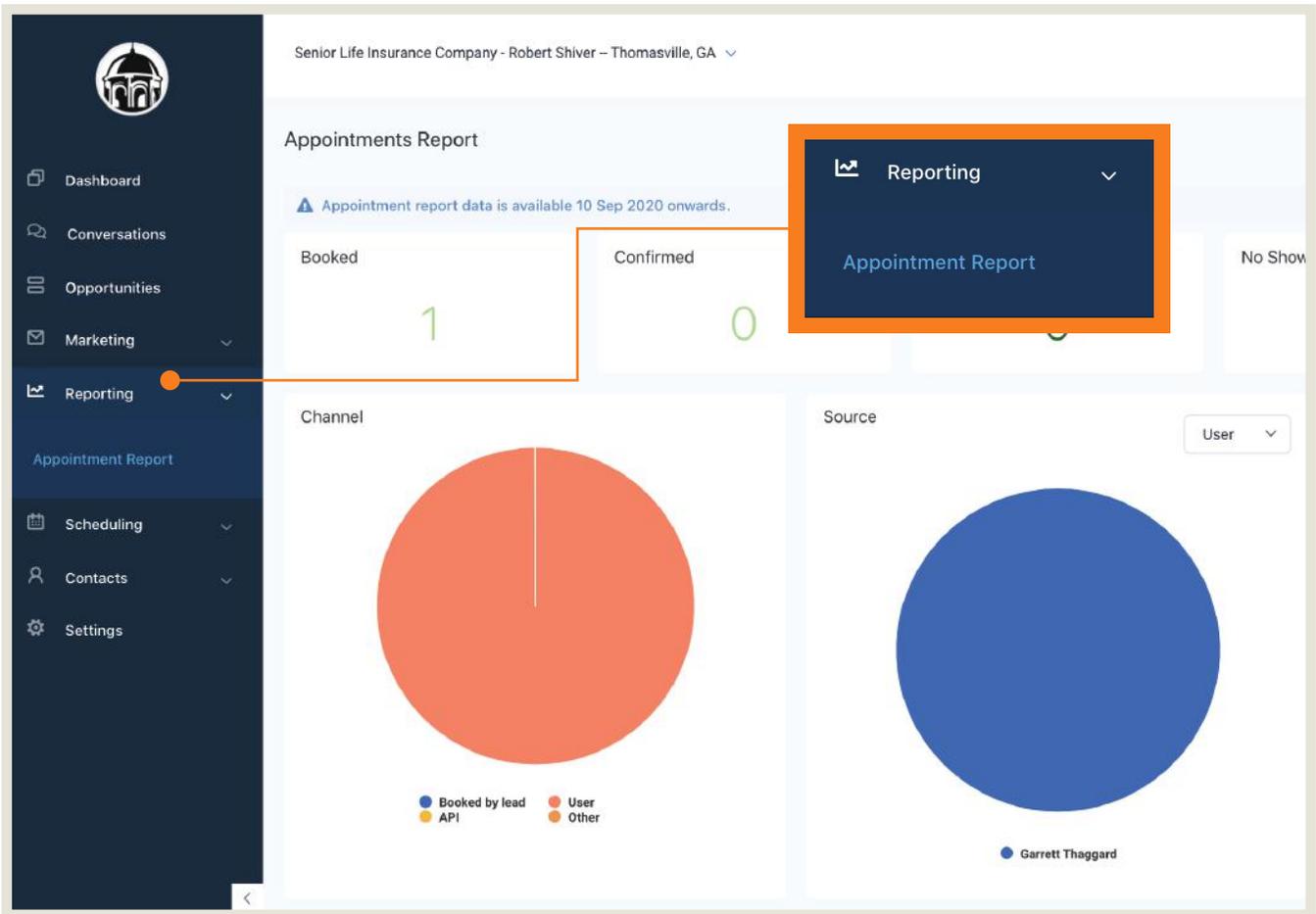
To get to a list of your appointments, click on the "Scheduling" tab and then the "Appointments" link.

This displays a list of all of your appointments to manage.

For example, if a recruit doesn't show, you should adjust their status to no-show & either add them to the missed appointment campaign or move them to the "Missed/Cancelled Interview" recruiting pipeline column.

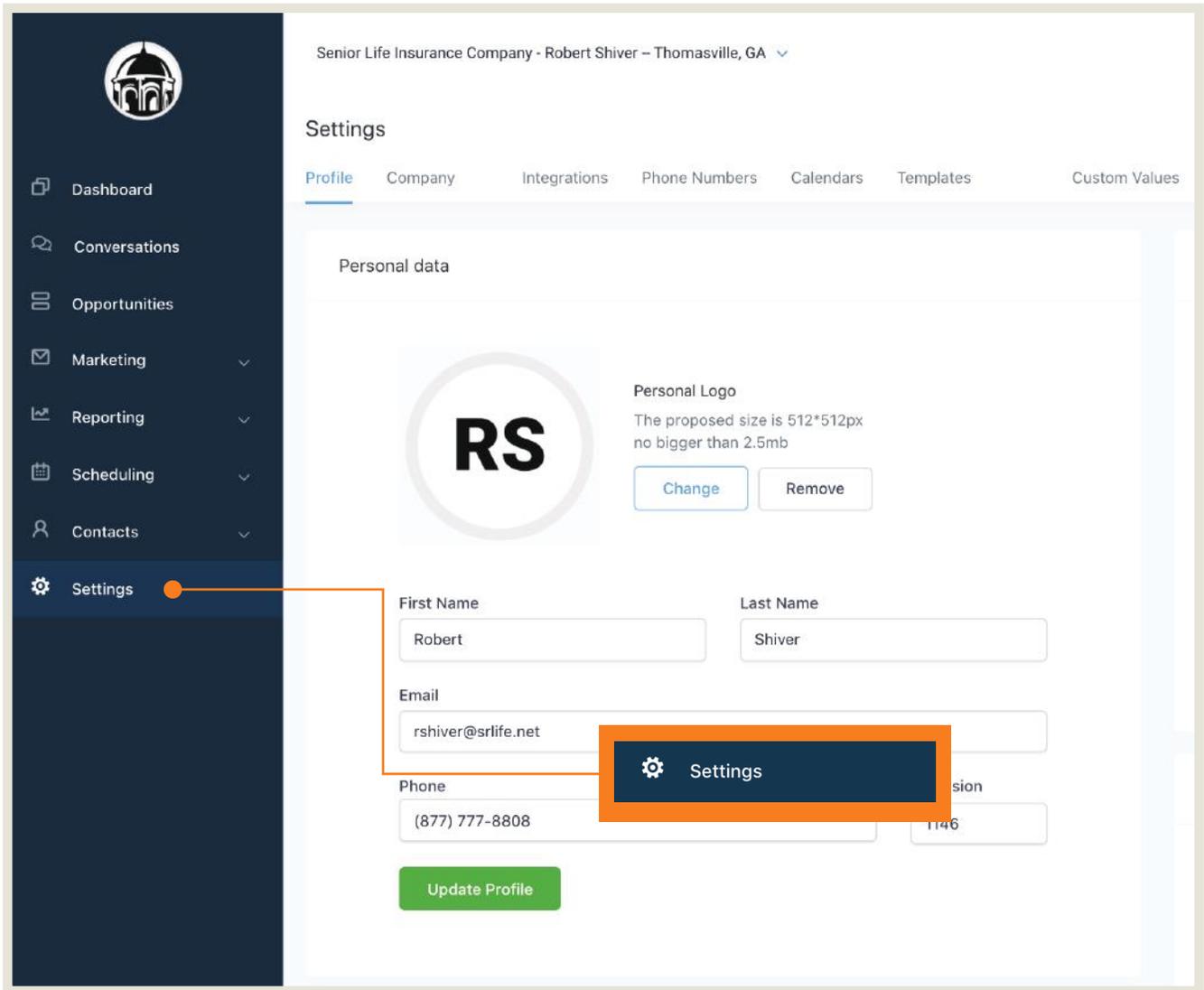


# REPORTING



The “Reporting” tab is more for higher level management as you grow your organization. Under this tab, you can keep up with booked appointments, shows vs. no shows, and see how much of your traffic is converting to appointments.

# SETTINGS



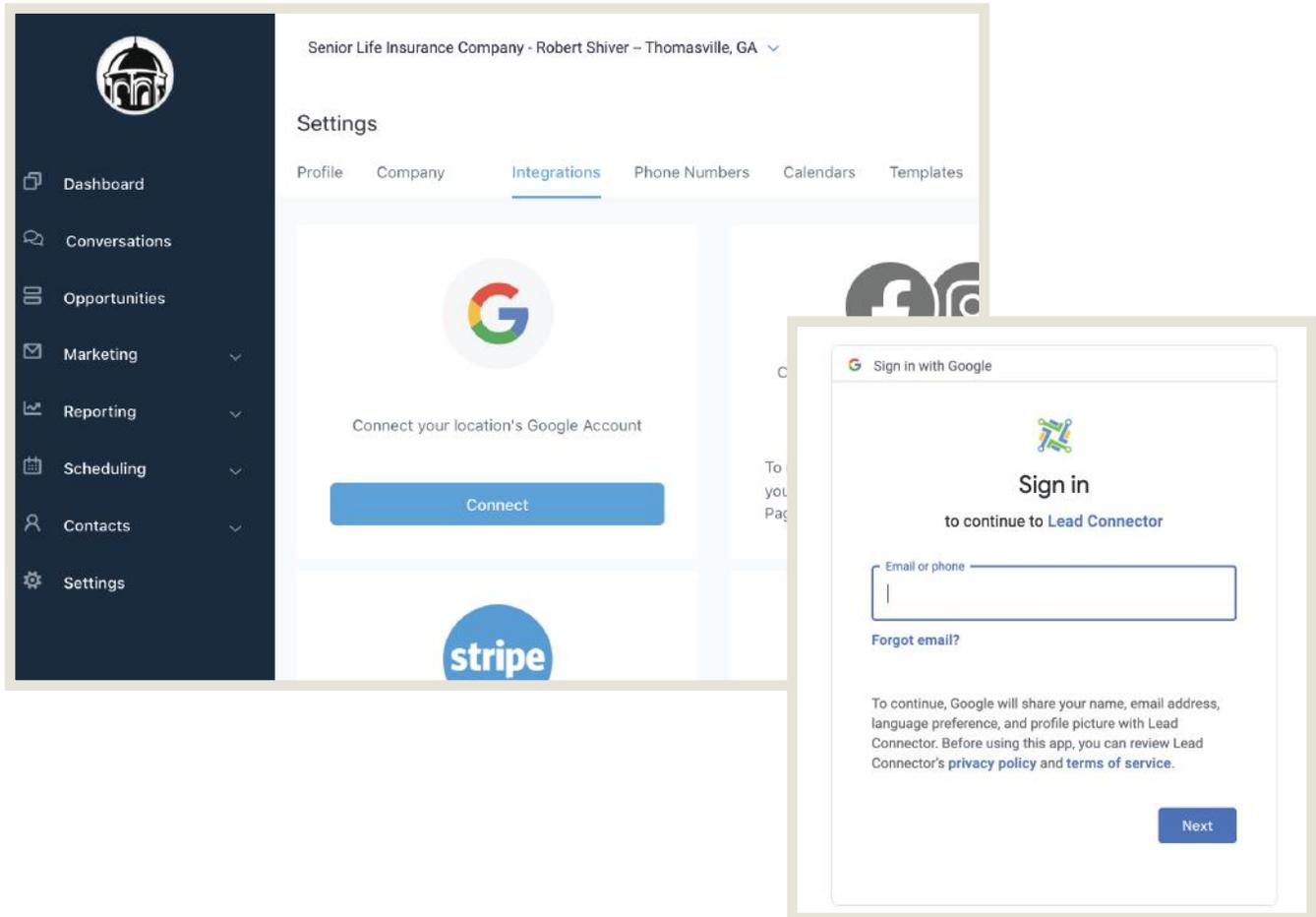
Under the “Settings” tab, you will be able to update your personal information, integrate your Gmail calendar, sync your Gmail calendar with your portal’s calendar, create your own custom text & email templates, and adjust your interview hours of availability.

## Updating Personal Information

Update your personal information by clicking on the “Profile” section. Make sure to click “Update Profile” afterwards.

## Integrating Your Gmail Calendar

If you use a Gmail calendar, you can integrate it into this portal. To do this, click on the “Integrations” section under the “Settings” tab.

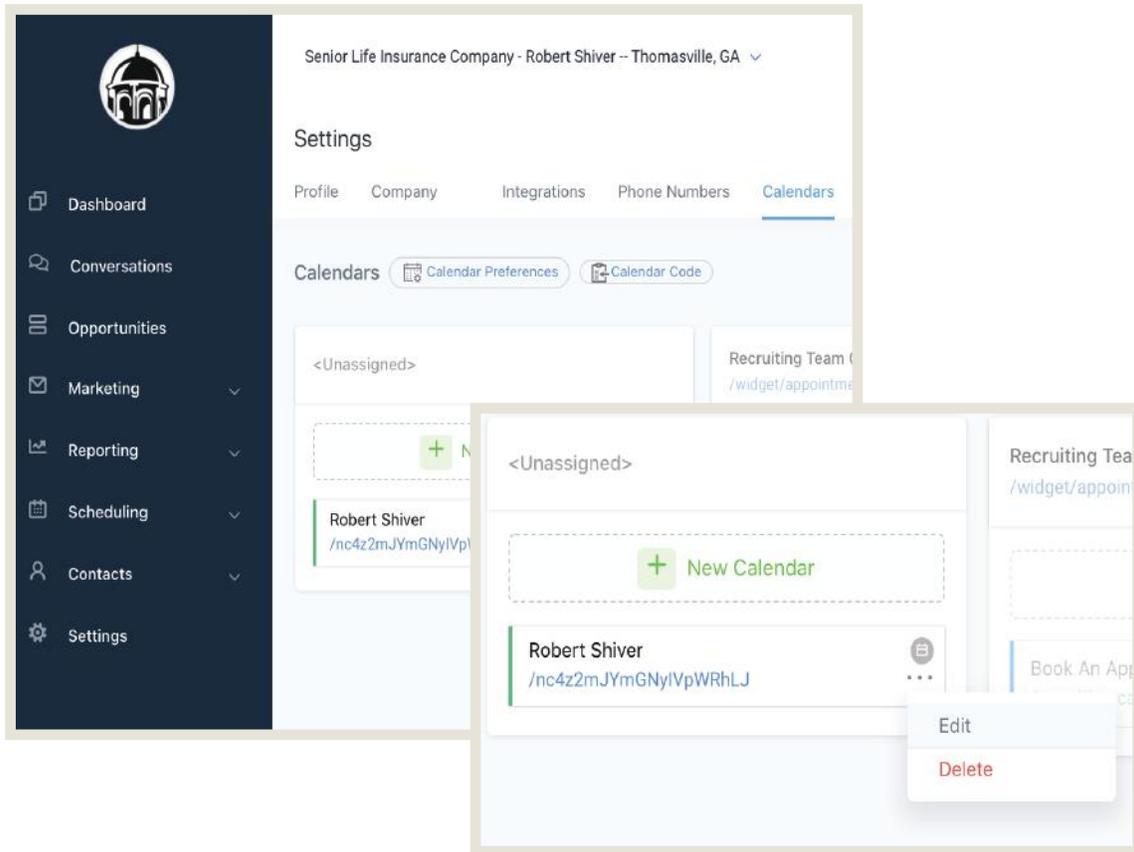


There will be a panel that says “Connect your location’s Google Account.” Click on the “Connect” button. This will pull up a new window prompting you to log into your Gmail. Please enter your email & password. After you’ve logged in, your account will be connected to the portal.

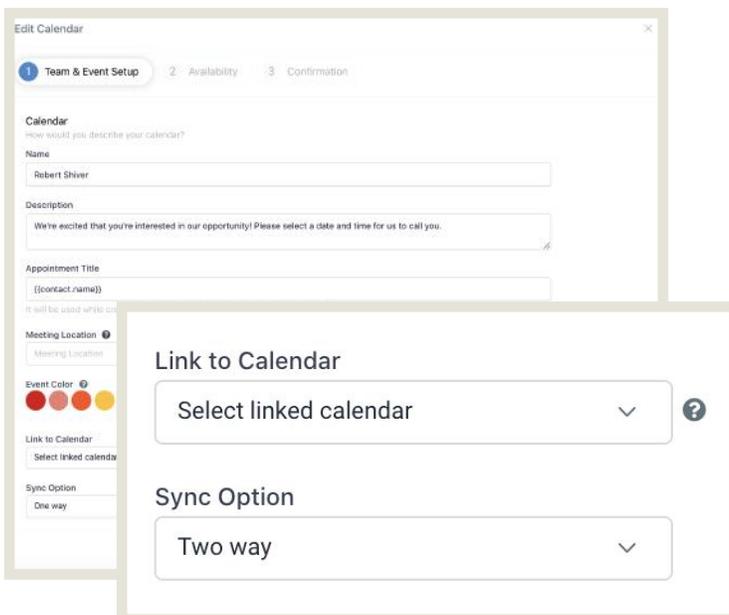
In order to sync your Gmail calendar to the portal’s calendar, you **MUST** complete the next step (see page 17).

## Syncing Your Gmail Calendar To Your Portal

After you've connected your Gmail calendar to the portal, you must sync it to your calendar. Do this by clicking on the "Calendar" section.



There will be a calendar with the name of your agency. Click on the three dots on that panel, and then click edit.



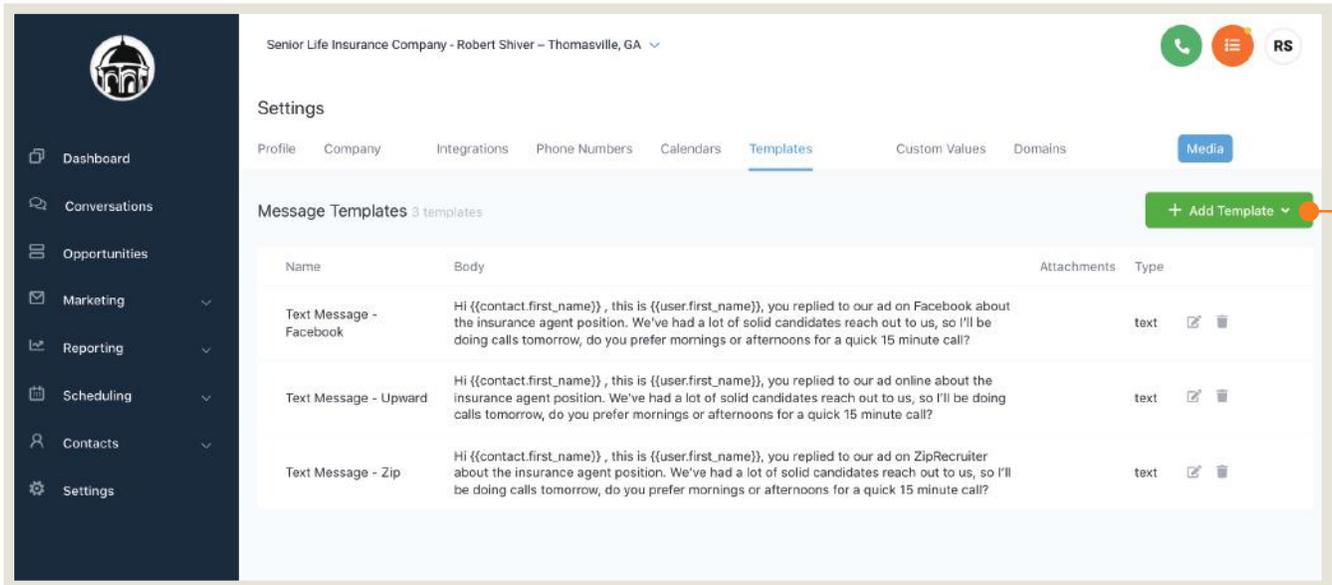
At the bottom of the pop-up that appears will be a dropdown to link your calendar & to sync your calendar.

Select the calendar you use & then set the sync option to two-way.

Make sure to press save!

## Creating Your Custom Text & Email Templates

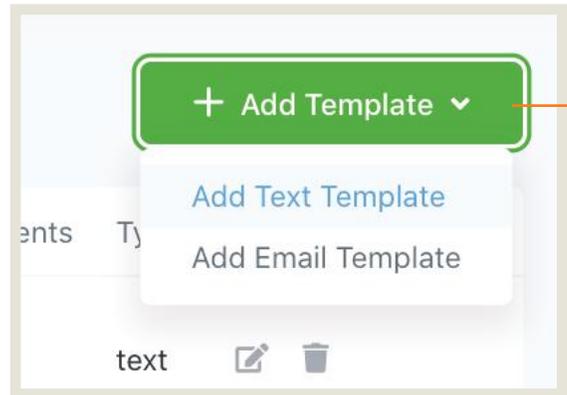
To add your own custom text & email templates, click on the “Templates” section.



Afterwards, click on the “Add Templates” button and then select either a text template or an email template.

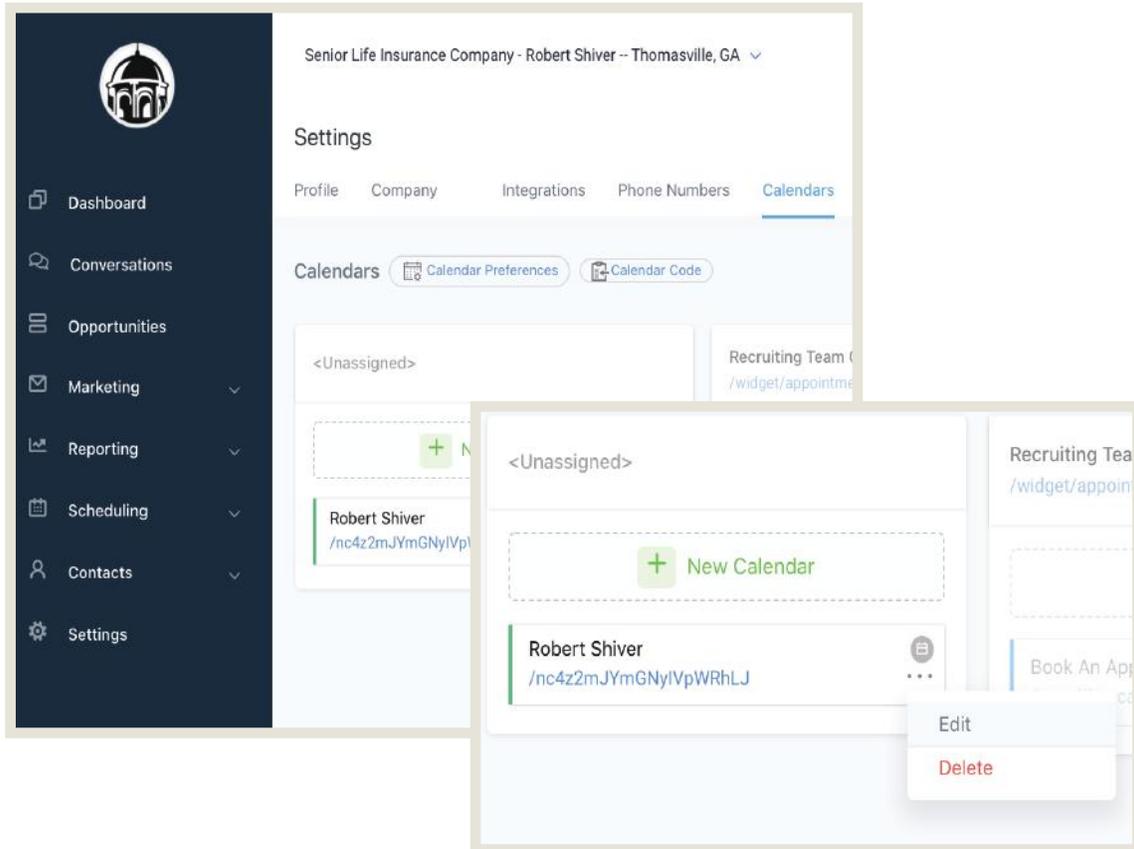
Please remember that these templates are just for text that you might send agents often. For instance, you might host a webinar that you tell your recruits about often so you can build a template to share that link.

These templates will not be part of your automation. You must manually share them with your contacts.



## Adjusting Your Interview Hours of Availability

To adjust your usual hours of availability for your interviews, click on the “Calendars” section. There will be a calendar with the name of your agency. Click on the three dots on that panel, and then click edit.



To adjust your usual hours of availability for your interviews, click on the “Calendars” section. There will be a calendar with the name of your agency. Click on the three dots on that panel, and then click edit.

1 Team & Event Setup   2 Availability   3 Confirmation

### Appointment Slot Settings

Configure duration and intervals for the appointment

Slot Duration: 30 minutes   Slot Interval: 30 minutes   Buffer Duration between appointment: 0

Appointments Per Slot: 1   Appointments Per Day: Appointments Per

### Scheduling Notice

Control and avoid last minute appointments by setting up scheduling notice before away hours

Minimum Scheduling Notice: Duration   Days: Days   Date Range: 14   Days: Days

### Office Hours

Click the days below to choose office hours

S M T W T F S

Monday + hours   Apply All

09:00 AM × 05:30 PM ×

Close Save

Click on the tab at the top that says “Availability.” On this section, you’ll be able to adjust the time spent during your interviews (the default is 30 minutes), how many people you can speak to during one interview slot, the minimum scheduling notice, and how far in advance recruits can book an interview with you.

In the “Office Hours” section, you can adjust what days you’re available, and then set hours of availability for those days.

Remember: if you have a meeting, lunch, or some other appointment during your usual hours of availability, you don’t need to adjust your hours as a whole. Instead, block out a period of time for yourself (see page 13).