

SPEED Training Check List



Name : _____ Immediate Officer : _____
 A/C No : _____ UM/AM : _____
 Tel No. : _____ GM/AM : _____

Agency Training for 1st 90 Days

Lesson	Training / Courses	Date of Attend	Initial By Agent	Initial By Trainer/Mgr	Remarks
M0 : Recruiting SOP					
1	Recruiting SOP_Agent	<input type="checkbox"/>			<input type="checkbox"/> Role Play
2	Recruiting SOP_Leader	<input type="checkbox"/>			<input type="checkbox"/> Role Play
M1 : Introduction					
	Insurance Mission	<input type="checkbox"/>			<input type="checkbox"/> Role Play
1	Your Future Start Here_Part 1	<input type="checkbox"/>			<input type="checkbox"/> Role Play
2	Your Future Start Here_Part 2	<input type="checkbox"/>			<input type="checkbox"/> Role Play
3	Your Future Start Here_Part 3	<input type="checkbox"/>			<input type="checkbox"/> Role Play
4	Fast Start- Selling is Easy_Part 1	<input type="checkbox"/>			<input type="checkbox"/> Role Play
5	Fast Start- Selling is Easy_Part 2	<input type="checkbox"/>			<input type="checkbox"/> Role Play
6	Fast Start- Selling is Easy_Part 3	<input type="checkbox"/>			<input type="checkbox"/> Role Play
M2 : Product Knowledge					
	Investment Link				
1	ILP Quotation Basic Knowledge	<input type="checkbox"/>			<input type="checkbox"/> Role Play
2	SPY Part 1	<input type="checkbox"/>			<input type="checkbox"/> Role Play
2	SPY Part 2	<input type="checkbox"/>			<input type="checkbox"/> Role Play
3	SPJ- Prenatal	<input type="checkbox"/>			<input type="checkbox"/> Role Play
4	SPLM	<input type="checkbox"/>			<input type="checkbox"/> Role Play
5	GMX	<input type="checkbox"/>			<input type="checkbox"/> Role Play
6	GFW	<input type="checkbox"/>			<input type="checkbox"/> Role Play
M3 : Sales Idea/Sales Kits					
	Training Video				
1	1st to 5th Generation of Medical Card	<input type="checkbox"/>			<input type="checkbox"/> Role Play
2	Medical Plan_Part 1	<input type="checkbox"/>			<input type="checkbox"/> Role Play
3	Medical Plan_Part 2	<input type="checkbox"/>			<input type="checkbox"/> Role Play
4	Medical Plan_Part 3	<input type="checkbox"/>			<input type="checkbox"/> Role Play
5	Family Protection Plan	<input type="checkbox"/>			<input type="checkbox"/> Role Play
6	爱的礼物	<input type="checkbox"/>			<input type="checkbox"/> Role Play
7	鱼缸的比喻	<input type="checkbox"/>			<input type="checkbox"/> Role Play
8	Income Protection Program	<input type="checkbox"/>			<input type="checkbox"/> Role Play
9	Debt Cancellation Plan	<input type="checkbox"/>			<input type="checkbox"/> Role Play
10	Saving Mindset_Part 1	<input type="checkbox"/>			<input type="checkbox"/> Role Play
11	Saving Plan_Part 2	<input type="checkbox"/>			<input type="checkbox"/> Role Play
12	Saving Plan_Part 3	<input type="checkbox"/>			<input type="checkbox"/> Role Play
13	Understanding Cycling Up The Hill	<input type="checkbox"/>			<input type="checkbox"/> Role Play
14	Policy Analysis_Part 1	<input type="checkbox"/>			<input type="checkbox"/> Role Play

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15	Policy Analysis——Part 2	<input type="checkbox"/>			<input type="checkbox"/> Role Play
16	3G Family Biz Trust	<input type="checkbox"/>			<input type="checkbox"/> Role Play
17	Employee Retention Program	<input type="checkbox"/>			<input type="checkbox"/> Role Play
18	Key Person Insurance Planning	<input type="checkbox"/>			<input type="checkbox"/> Role Play
19	Legacy Plan	<input type="checkbox"/>			<input type="checkbox"/> Role Play
M4 : Lead Management					
1	人脉存折户口	<input type="checkbox"/>			<input type="checkbox"/> Role Play
2	顾客购买·保险的心态	<input type="checkbox"/>			<input type="checkbox"/> Role Play
3	简易顾客群区分图	<input type="checkbox"/>			<input type="checkbox"/> Role Play
4	遇到没有保单的顾客群	<input type="checkbox"/>			<input type="checkbox"/> Role Play
5	当客户讲我没有钱时，你应该怎么说	<input type="checkbox"/>			<input type="checkbox"/> Role Play
6	遇到单一医药卡的客户群	<input type="checkbox"/>			<input type="checkbox"/> Role Play
7	遇到只买人寿或储蓄保险的客户群	<input type="checkbox"/>			<input type="checkbox"/> Role Play
8	遇到只卖意外保险的客户群	<input type="checkbox"/>			<input type="checkbox"/> Role Play
9	遇到只卖严重疾病保单的客户群	<input type="checkbox"/>			<input type="checkbox"/> Role Play
10	遇到只卖投联医药卡配套的客户群	<input type="checkbox"/>			<input type="checkbox"/> Role Play
11	Warm Lead	<input type="checkbox"/>			<input type="checkbox"/> Role Play
12	Cold Lead	<input type="checkbox"/>			<input type="checkbox"/> Role Play
M5 : Approach					
1	Approaching	<input type="checkbox"/>			<input type="checkbox"/> Role Play
2	Handling Objection	<input type="checkbox"/>			<input type="checkbox"/> Role Play
3	Social Media Approach	<input type="checkbox"/>			<input type="checkbox"/> Role Play
4	Telephone Approach	<input type="checkbox"/>			<input type="checkbox"/> Role Play
M6 : Objection Handling					
1	Objection Handling_1	<input type="checkbox"/>			<input type="checkbox"/> Role Play
2	Objection Handling_2	<input type="checkbox"/>			
M7 : Technical / Software					
1	Underwriting Guideline	<input type="checkbox"/>			<input type="checkbox"/> Role Play
2	MPOS_Part 1	<input type="checkbox"/>			<input type="checkbox"/> Role Play
3	MPOS_Part 2	<input type="checkbox"/>			<input type="checkbox"/> Role Play
4	Medical Questionnaire & Agreement	<input type="checkbox"/>			<input type="checkbox"/> Role Play
5	Epartner	<input type="checkbox"/>			<input type="checkbox"/> Role Play
6	GESICA	<input type="checkbox"/>			<input type="checkbox"/> Role Play
M8 : Servicing					
M9 : Claim SOP					
1	Medical Card Claim_Part 1	<input type="checkbox"/>			<input type="checkbox"/> Role Play
1	Medical Card Claim_Part 2	<input type="checkbox"/>			<input type="checkbox"/> Role Play
3	Accident Claim	<input type="checkbox"/>			<input type="checkbox"/> Role Play
4	Death Claim	<input type="checkbox"/>			<input type="checkbox"/> Role Play
5	Critical Illness Claim	<input type="checkbox"/>			<input type="checkbox"/> Role Play
6	TPD Claim	<input type="checkbox"/>			<input type="checkbox"/> Role Play

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M10 : Awards & Promotion					
1	SIB Incentive Trip	<input type="checkbox"/>			
2	SIB BRANDS AWARD	<input type="checkbox"/>			
3	SES 13	<input type="checkbox"/>			
4	SSA (Elite, Super Elite, Premier, Excellent)	<input type="checkbox"/>			
5	BEST Award	<input type="checkbox"/>			
6	GSPC	<input type="checkbox"/>			
7	MDLA	<input type="checkbox"/>			
8	MBA	<input type="checkbox"/>			
	GE Promotion				
1	SM	<input type="checkbox"/>			
2	UM/AM	<input type="checkbox"/>			
3	GM/GAM	<input type="checkbox"/>			
	Industry Awards	<input type="checkbox"/>			
1	AKARD	<input type="checkbox"/>			
2	MDRT/COT/TOT	<input type="checkbox"/>			
3	IDA	<input type="checkbox"/>			