Agency Owner/Licensee Guide

Step 1: On boarding

Your designated Agency Coordinator will cover the following:

- Complete your intake Paperwork
- Agency Training with your Agency Coordinator (Estimated Time: 2 days)

The coordinator will help you go through your online portal and understand all of the Licensee policies and procedures. The guide will also cover very important need to know information.

It is critical that you initiate your personal training as soon as possible either via our training portal and attending a live class. Nu Republic promotes an exact approach in establishing agency owners as the status quo. All agency owners should act as the template for there expanding organization. Meaning that we recommend an agency owner to have a thorough knowledge of products, services, company procedures & tactics, exemplifying Nu Republic's recommended model and philosophy.

Step 2: Establish a Meeting Space

Establish a designated meeting space for your team. We recommend that you establish an office space to begin hiring. If you currently have an office space that you are utilizing for other purposes, you can utilize this space for your contractors. The idea is to have a space to conduct interviews, take paperwork, prepare returns, train employee's, conduct employee meetings and allow employees to pick up checks. Virtual Offices are a good low cost option. Offices such as co-working spaces are low in cost but offer you the flexibility to utilize them as needed.

Some satellite locations with good professional environments may be utilized for this space, and save you from unnecessary rental overhead.

Step 3: Hire, Hire, Hire

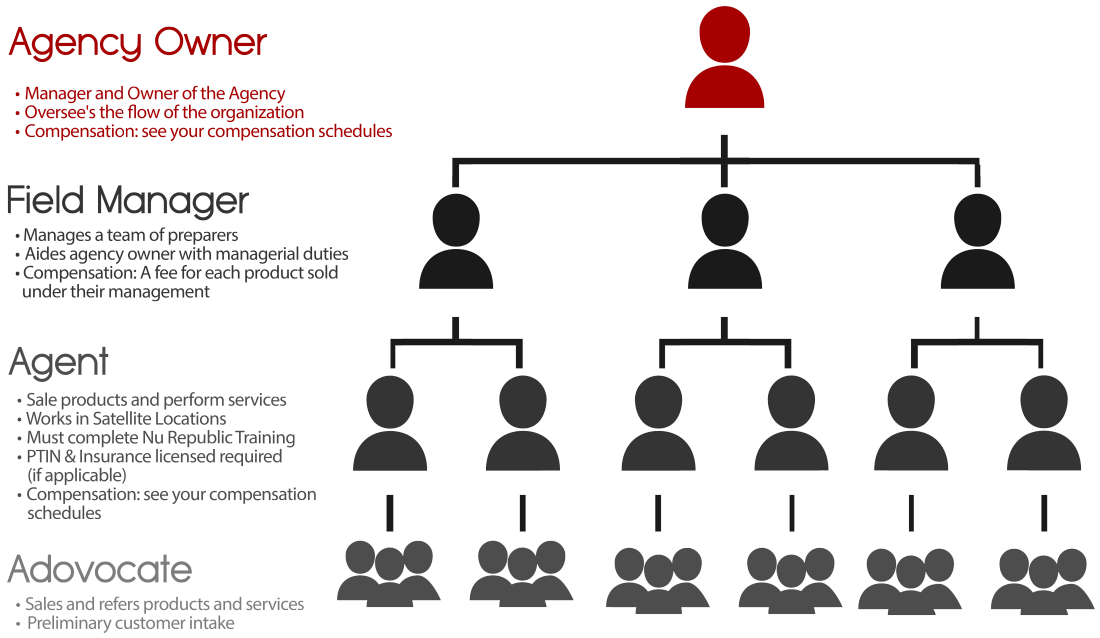
The major part of the NR recommended model is to hire as many agents as possible. It is critical to establish a management team, your management team allows you to organize and replicate your efforts. That position is titled as a managers, whom in turn hire, train, and sell products and services. In the online portal there is a section titled: Generating Six Figures through Hiring. This gives you the financial breakdown on hiring at least 10 field managers who in turn hire several agents, focusing on 10 key agents.

How to Hire Agents:

1. Run a hiring ad via Indeed, Craigslist, Monster, or other local sites to post job ads.
2. Set up Interviews to assess the applicant's skill set.
3. If you extend the opportunity to them, collect their Intake Paperwork. This includes:

    a) Agent Application
    b) Nu Republic & Tax Contractor Agreements
    c) W-9
    d) Payroll Form
    e) Non Compete and Confidential Agreement
    f) Non Disparagement
    g) Copy of Driver's License & Copy of Social Security Card
    h) Fingerprint Card

4. Below is a diagram of the NR recommended positions available for hiring.



Step 4: Set up Financial Service Stations

Financial Service Stations are spaces that you can set up to allow products to be sold and services to be performed. Some examples are car lots, check cashing locations, apartment complexes, churches, etc. We have a financial service station packet for you to give to the Property Manager that explains the idea to the Location Owners. You want to set up as many locations as possible in order to have places for your employee's to work.

Step 5: Set up an Orientation Boot Camp

The purpose of the Boot Camp is to get your agents trained and acclimated to the recommended NR Model. During the Boot Camp you will conduct an Orientation, Scenario Training and Marketing to help your agents get additional clients.

Step 6: Have a Prospect Party

One of the essential parts of the recommended NR model is to have agents retain prospective clients via family, friends and colleagues. It is recommended that agents complete a Prospect Sheet which is a list of 100 people that they know and will call to set up appointments to offer services. One of the most affective ways to get agents to complete the Prospect Sheets is through a Prospect Sheet Party. This is a gathering with your agents where they all come and complete the sheets and begin to call their prospects to schedule appointments. As the Agency, you can provide food or refreshments and maybe give incentives to the agents's with the most appointments.

Step 7: Start Selling & Performing services

After completing the Training, Prospect Sheets and Boot Camps we recommend the agents to begin to solicit prospective customers and initiate sales. Initially start with the more basic products as you grow to a more comprehensive understanding of the more sophisticated products.

Step 8: Start Marketing

The recommended marketing strategy is aggressive in it's approach. One of the key parts of the marketing strategy is the placement of ads and signs in local areas. Placing signs in local places such as, daycare centers, DFACS offices, WIC offices, Large apartment complexes, expressway exit ramps, etc. This will drive clients to your agency and generate leads for your agents. Set up a designated phone number for your agents. This can be through a physical line or VOIP number such as Line 2 (www.line2.com) or Ring Central (www.ringcentral.com).

Agency Owner Getting Started

Agency Code:

Tasks	Date Completed
Onboarding	
Corporate Training Day 1	
Online Agency Owner Training	
Online Tax Training	
Marketing Tours Schedule Created	
Business Phone Line	
Business Email	
1st Hiring Ad	
1st Boot Camp	
1st Interview	
1st Team Meeting	
1st Prospect Party	
Idea of Satellite Location	
Initial Marketing Material Order	
Hire a Manager	
Business Card Order	
Signs (Advance) order	
Corporate Loyalty Input in the System	
Employee Emails	
1on1 Training Schedule	
Usernames and Passwords	

Understanding Checklist

- ☐ 10x10 Expansion Formula
- ☐ The Two Closings
- ☐ Phone Techniques
- ☐ Interview Process
- ☐ Sign Placement
- ☐ Public Relations
- ☐ Nu Republic Database
- ☐ Combo Sales (Ancillary Products)
- ☐ Dress Code
- ☐ Fraud
- ☐ Payroll
- ☐ Satellite-Retail-Mobile
- ☐ PTIN
- ☐ Bonuses
- ☐ Corporate loyalty
- ☐ Boot Camps
- ☐ Prospect Parties