



RECRUITING & ONBOARDING SOP

SECOND INTERVIEW | EXAM | LICENSING | CONTRACTING

NEXT-DAY SECOND INTERVIEW

10-DAY LICENSE TARGET

MENTOR RYTHM



PROCESS MAP

EXECUTIVE FLOW

Run every green-light candidate through the same clean sequence: second interview, live scheduling, study support, license completion, and contracting readiness.

1 Next-Day Callback

- Call the day after Company Overview. Invite them into the second interview. Preferred: in person. Virtual: Zoom.
- Explain that if it is a mutual fit, licensing steps start today.
- Tell them to have payment ready.

2 Second Interview

- Use the approved sales or no-sales question set.
- They need to come business casual.
- If mutually a good fit, move on to live scheduling.

3 Second Interview, Schedule Live

- Green light means schedule on the spot.
- Study guide, exam, fingerprints, and training target.
- Do not let the target drift.

4 10-Day Study Track Expectation

- Focus on end-of-chapter exams to move faster.
- Simulated exams 2-3 times before test day.
- Aim for 85+; 70 is the minimum pass mark.

5 Mentor Check-Ins

- Set expectations before they leave.
- Touch base about every 3 days.
- Ask for screenshots when they need help.

6 License to Contracting

- State license via NIPR.com.
- NPN through NIPR.com after the license.
- E&O next, then send to contracting.

NON-NEGOTIABLE STANDARD

The leader accomplishes these items with the new prospect at the end of the second interview.



SECOND INTERVIEW + LIVE SCHEDULING

1 Next-Day Callback

CALLBACK PURPOSE

- Call the day after the Company Overview. This callback is to invite them into the second interview.
- The second interview should be in person. For virtual, use Zoom.

2 Interview Decision

USE THE RIGHT QUESTION SET

- Approved set A: Prior sales experience.
- Approved set B: no prior sales experience.
- Keep both question sets in the Recruiting Binder. Green light means schedule everything before they leave.

PAYMENT EXPECTATION

Before scheduling, remind them to bring a form of payment for the study guide, licensing exam, and fingerprints.

SCHEDULE WHILE TOGETHER

A. Compass Study Guide

- Go to: www.getyourinsurancelicense.com/compasshealthconsultants
- Start My Course
- \$50
- Start studying today.

B. Pearson VUE Exam

- Go to: www.pearsonvue.com
- Create account and agree to required sections.
- Exam type: [Insert State Exam Type]
- Schedule for day 10; day 9 is acceptable if needed.
- Pay now and capture date/time.

C. IdentoGO Prints

- Go to: www.uenroll.identogo.com
- Service code: [Ask Recruiting for Code]
- Choose a location, date, and time.
- Pay now.
- Capture appointment details. Take a photo of your receipt and save it.

MEETING CLOSE

Do not end the meeting without the study guide started, exam scheduled, fingerprints scheduled, and the training dates confirmed/available.

This is the first test: can the candidate set a target and hit it?

10-DAY LICENSE TRACK

STUDY STANDARD

The schedule creates urgency and momentum. The mentor keeps the rhythm simple, visible, and encouraging.



Study Instructions

- Focus on end-of-chapter exams. They help the new agent move through the material quicker.
- Use chapter reviews and make notes.
- Do not get stuck trying to master every page before moving forward.
- Finish material in 6-7 days.
- Use the final 3-4 days for simulated exams.

Exam Readiness Targets

- 85% target score on simulated exams before the actual exam.
- 70 minimum score needed to pass and attend training.
- 2-3 rounds take the simulated exam about 2-3 times before the test day.
- Every 3 days mentor check-in rhythm during study

REIMBURSEMENT REMINDER

\$120 reimbursement if the new agent gets licensed within 10 days of the second interview.
Use this as encouragement, not pressure.

Leader language: Aim for 85+ in practice. A 70 passes. Confidence wins test day.



MENTOR RHYTHM + TEAM UPDATES

FOLLOW-UP STANDARD

Mentor Rhythm

- Set the expectation that you will check in while they study.
- Touch base about every 3 days.
- Ask them to reach out with questions and include screenshots when possible.
- Reinforce end-of-chapter exams and simulated exam targets.
- Wish them luck the day before the exam.
- On exam day, celebrate and congratulate. If they do not reach out, you reach out. They need your excitement.

Status Format Example

SEND TO RECRUITING TEAM VIA EMAIL OR TEXT

Recruiter's Name: Brandon Bartnick

Study Guide: Complete

Exam Date: Saturday the 25th @ 1:15pm

Fingerprints: April 16th @ 11:50am

Training Date: April 28

Update the team as soon as dates, pass/fail results, and contracting readiness change.

MONDAY Recruiting Board

- Enter exam date/time.
- Enter fingerprint date/time.
- Add training date as soon as assigned.
- Keep the candidate visible until contracting handoff is complete.

Ownership Standard

- A candidate should never wonder what happens next.
- The leader owns clarity, momentum, and excitement.
- Support continues until the agent is ready for contracting.



POST-EXAM + CONTRACTING READINESS

AFTER PASS

Once the agent passes, move quickly. Licensing must be complete before the agent can be sent to contracting.

1. State License

→ Apply for state license through NIPR.com after passing the exam.

2. NPN

→ The agent must have the state license before getting their NPN. Find the NPN on NIPR.com.

3. E&O

→ After license and NPN are complete, obtain E&O at www.chcuniversity.com/eo.

4. Contracting

→ Only send to contracting after state license, NPN, and E&O are complete.

POST EXAM LINKS

State License + NPN: NIPR.com

E&O: www.chcuniversity.com/eo

New Agent Document Folder

- Have the new agent create a folder to save every licensing and contracting document.
- Save exam confirmation/pass proof, fingerprint receipt, state license, NPN, E&O, and payment receipts.
- They will need these documents for contracting.

Contingency Binders

- Recruiting Binder: steps, approved questions, calendar, pitches, links, codes, and status format.
- Training Binder: training schedule, onboarding standards, post-license steps, and handoff notes.
- Update both at least 2x per year.

FINAL HANDOFF RULE

Recruiting can begin contracting only after all three items are complete: state license, NPN, and E&O.



POST-EXAM + CONTRACTING READINESS

USE THIS AT YOUR DESK

Check each item as you move a green-light candidate from second interview to contracting readiness.

Second Interview + Scheduling

- ☐ Call the day after Company Overview
- ☐ Invite candidate into the second interview.
- ☐ Schedule in person; use Zoom if virtual.
- ☐ Confirm they have payment ready if moving forward.
- ☐ Use the correct approved question set: sales or no prior sales.
- ☐ Green light? Purchase Study Guide, Pearson VUE, and IdentoGO while together.
- ☐ Schedule exam and fingerprint details into the MONDAY recruiting board.
- ☐ Send recruiting team the status update format.

Study Support + Contracting

- ☐ Set expectation that you will check in while they study.
- ☐ Touch base about every 3 days.
- ☐ Tell them to send screenshots with questions.
- ☐ Remind them to focus on end-of-chapter exams.
- ☐ Remind them to take simulated exams 2-3 times and aim for 85+.
- ☐ Wish them luck the day before the exam.
- ☐ Celebrate the result; reach out if they do not update you.
- ☐ Guide state license via NIPR.com
- ☐ Confirm NPN is found on NIPR.com after license is active.
- ☐ Confirm E&O is obtained through chcuniversity.com/eo.
- ☐ Confirm documents are saved in the agent folder.
- ☐ Send to contracting only when state license, NPN, and E&O are complete.



NEW AGENT CHECKLIST

GIVE THIS TO THE NEW AGENT

This checklist keeps the agent focused on the documents and deadlines needed for contracting.

Before the Exam

- ☐ Create a folder named Licensing + Contracting Docs.
- ☐ Save all confirmations, receipts, and completed documents in that folder.
- ☐ Set up Xcel study guide with your mentor.
- ☐ Complete chapter reviews and focus on end-of-chapter exams.
- ☐ Finish material in 6-7 days.
- ☐ Take simulated exams 2-3 times before the actual exam.
- ☐ Aim for 85+ on simulated exams.
- ☐ Sit for the licensing exam on the scheduled day and make at least a 70.

After Passing

- ☐ Complete fingerprints if not already complete
- ☐ Apply for state license through NIPr.com.
- ☐ Save the state license in your document folder.
- ☐ After the state license is active, find your NPN on NIPR.com.
- ☐ Save your NPN information in your folder.
- ☐ Obtain E&O at chcuniversity.com/eo
- ☐ Save E&O proof in your folder.
- ☐ Send requested documents to your mentor/recruiting team for contracting.
- ☐ Attend your scheduled training date.