

Essential Business Tools for New Agents

Set Up Before You Sell

- Avoid scrambling during your first week
- Establish a functional, professional foundation



The Cost of Disorganization



Looking unprofessional
in front of clients



Losing track of
written business

4

Core Tools from Day One

Not 20. Not a full tech stack. Just four.



TOOL 01

CRM System

- Track every client, conversation, and policy
- Replaces memory and sticky notes
- \$20–\$50/mo or via your FMO



TOOL 02

Dedicated Business Phone

- Keeps personal cell number private
- Routes calls directly to your phone
- \$10-\$20/mo with voicemail and texting



TOOL 03

Calendar & Scheduling Tool

- Clients pick times from your availability
- Eliminates scheduling phone tag
- Prevents double-booking (Often free)



TOOL 04

Document Scanner App

- Capture clean PDFs directly on your phone
- Rapid submission from the field
- Replaces bulky hardware (Often free)



Your Day-One Stack



CRM



Business
Phone

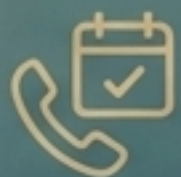


Scheduling



Scanner
App

The Workflow in Action



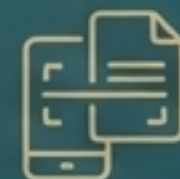
Prospect calls your business number. You schedule them via the calendar tool.



First Contact

The Workflow in Action

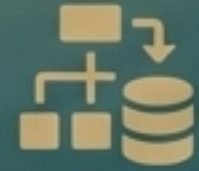
You run the appointment.
Client enrolls. You scan
the signed application on
your phone.



The Appointment

The Workflow in Action

Submit from the driveway.
Log policy details in the CRM.
Set a two-week follow-up.



Submission & Logging

Set Up Your 4 Tools

- Ask FMO for recommendations
- Activate CRM
- Setup business phone
- Connect scheduling tool
- Download scanner app