

BACK TO SCHOOL BEST PRACTICES



Prospecting

“Make it your absolute mission to ‘touch’ every new teacher and employee”

- Review school board minutes weekly to see if any new teachers have been named and posted.
- The day before your first visit, go to the school's webpage and visit each new teachers' page. Learn something about them you may have in common, or find interesting.
- Be sure to have last year's school roster printed, and keep your eyes open for updated school rosters being posted to that you can scrub the two against each other.
- Ask secretaries for new staff/employee list.
- Ask for retiree list.
- Schedule new-teacher orientations, if possible.
- Contact your old leads to schedule them on campus either before school starts up again, and or during the 1-2 weeks of school.
- Central Administration - continue to build rapport with payroll and Business Administrator. Drop off materials that can be distributed to any new staff member or existing employee that is interested in a 403(b) plan. Make sure contact lists are updated with your correct information.
- Meet with your EA presidents, EA building Reps to schedule faculty meetings.
- Meet with your Principals to schedule faculty meetings.
- Stop by schools that are not scheduled to visit in September and stuff mailboxes with marketing sheet and reply card.
- Ask new, young teachers just out of college if they are aware of the student loan forgiveness program the federal government put in place for them (it's an income based repayment program). Go to www.ibrinfo.org and read up on it. GREAT introduction idea.
- Volunteer IBR workshops for new staff.

Marketing

- Customize flyers and get them printed for all of your schools.
- Consider a flyer or bio with your picture on it for distribution to the schools. Let everyone see who you are so subconsciously will recognize you.
- Stuff all schools that you are permitted.
- Drop off welcome-back trinkets for secretaries, COI's and important contacts (purchase through marketing).
- Prepare and hand-deliver Welcome Kits for new staff. Could include a piece on "what is a 403(b), a return card and/or an announcement as to when you will be in that school.
- Personally introduce yourself to new Admin or Clerical staff if there are any.
- Deliver "Welcome Back" notes/annual review letter in envelopes for your current clients.
- Email all clients - touch base with existing clients to let them know when you will be visiting their school. Remind them of the importance of an increase.
- Offer to volunteer.
- Identify clubs you want to assist.
- Offer teaching classes.



Organization

- Maintain a binders on each school/ district. Make sure it is up to date.
- Stock up on yellow pads, pens, office supplies.
- Stock up on lead cards (order more if you need to).
- Refresh your TSA Field kit (all the items you will need to prospect and write cases).
- Practice your sales presentation.



Scheduling

- Book all schools for the semester.
- Start seeing your secretaries 1-2 weeks out to schedule Lunch visits.
- Use your planner (paper/electronic) and write in an exact game plan of where you will be and what you will be doing EVERY DAY.
- Schedule client reviews during the weeks before school in the teacher's classroom to gain access to new staff.
- Schedule your own prospecting times at each school in the 1-2 weeks before school starts, to catch teachers setting up their classrooms.



The Perfect Formal Visit Guide

Things to Bring to a Formal Visit

1. Yellow Highlighter
2. Pens
3. Formal Visit Announcement Flyer
4. 403(b) Packet
5. Formal Visit Sign
6. Flyer To Stuff Buildings
7. Business Cards
8. Lead Cards
9. Visitor Badge

Things to Get During a Formal Visit

1. Staff List
2. Names of New Teachers
3. Lunch Schedule
4. Map of the School (don't ask for one, you just have to find one)
5. Planning Period Schedule

People to See During a Formal Visit

1. Nurse
2. Head Custodian
3. Lunch People
4. Counselors
5. Front Office People (Secretary, Records Keeper)
6. Coaches
7. Teachers
8. Clients
9. Security People
10. Referrals

When In Teacher's Lounge

1. Put a formal visit announcement flyer in front of formal visit sign
2. Put an approved piece on 403(b) (what is..., benefits of...) on all teacher lounge tables
3. Listen in on conversations to catch teachers' names
4. Do one table talk per lunch period
5. Look for competitor info

When Leaving Formal Visit

1. Thank the principal & continue to build rapport
2. Tell secretary/front desk person that you will see them soon