



Experienced Producer Program Timeline (SAMPLE)

Months in Program

Before Producer Starts, Polestar:

Finalizes the Program details with the Agency Principal

Orients the producer on the start date regarding the program overview

1 2 3 4/5 6

After the producer starts, the producer (with help of Agency mentor and Polestar Coach):

Begins weekly meetings with Polestar assigned coach

x x x x

Begins Sales Courses (modules outlined in flyer) & Coach Assignments

x x x x

Prepares a goal and prospecting plan to review with Polestar coach and agency mentor

x x x x

Makes joint prospecting calls with agency mentor (if applicable) and gains feedback on delivery

x x

Begins insurance technical courses (if applicable)

x

Receives formal performance review (from coach to agency mentor/principal)

x

Completes Insurance Technical Courses (if applicable)

x

Completes and Delivers Presentation of Business Plan (if applicable)

x

Completes Program and receives formal performance review (with Agency mentor and Polestar Coach):

x