



FastTrack Timeline (SAMPLE)

Before Trainee Starts, Polestar:

- Finalizes the Program details with the Agency
- Orients the trainee on the start date regarding the program overview

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

Weekly meetings with Polestar assigned coach

Completes Insurance Sales Courses

Achieves license (if applicable)

Prepares a prospecting plan

Begins Prospecting

Begins going on appointments (shadows agency partner/closer)

Begins insurance technical courses

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

Completes Insurance Technical Courses

Completes Appointments with agency partner/closer

Begins solo prospecting

Begins Polestar Webinar series (reinforcing sales skills) and continues with group coaching

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

Months in Program

	1	2	3	4/5	6
Weekly meetings with Polestar assigned coach	x	x	x	x	
Completes Insurance Sales Courses	x				
Achieves license (if applicable)	x				
Prepares a prospecting plan	x				
Begins Prospecting	x				
Begins going on appointments (shadows agency partner/closer)		x			
Begins insurance technical courses		x			
Receives formal performance review (from coach to agency mentor/principal)			x		
Completes Insurance Technical Courses				x	
Completes Appointments with agency partner/closer				x	
Begins solo prospecting				x	
Begins Polestar Webinar series (reinforcing sales skills) and continues with group coaching				x	x
Completes FastTrack Program and receives formal performance review (with Agency mentor and Polestar Coach):					x