

New Hire Training Syllabus

Day 1:

- New Hire HR Orientation
 - o New Hire Paperwork
 - o Preview of Corporate Structure – SIC, Cogo Capital, The Lee Arnold System, Lake City Servicing, Arnold Professional Holdings & The Lee Arnold Team
 - o Benefits
 - PTO
 - Medical, Vision, Dental, Life and AD&D
 - 401K
 - o Review of Employee Manual
 - Dress Code
 - o Timecard System
 - o Additional Resources – “where to find”
 - o Parking
- New Hire COW Orientation
 - o Circle of Wealth Philosophy & Mission Statement – how all divisions connect and work together:
 - Education
 - Borrowing
 - Lending
 - Loan Servicing
 - RE Investing
 - o Client GOALS – (1) \$250,000 cash minimum in liquid funds, (2) become accredited, (3) give back
 - o IN-DEPTH COW explained:
 - The Lee Arnold System of RE Investing – Intro to Training & Testimonials
 - Cogo Capital – Intro to Loan Programs
 - Cogo Brokering – Intro to PM Brokering
 - Secured Investment HYFs – Intro to Passive Investing
 - Arnold Professional Holdings & The Lee Arnold Team – Intro to “practice what we preach” and Market Connections
 - He’s the Solution Ministries – Bold Faith, Core Values

DAILY STRUCTURE Beginning Day 2:

7 AM – 8 AM Live Call Training w/ Manager & Closers

8 AM – 12 PM Sales Training – Videos + Hands-On + Application to LAS

1 PM – 4 PM Product & Process Training – Webinar + Hands-On

4 PM – 5 PM Job Shadow – Call Monitoring

Day 2:

- Sales Training – Video *Sales Excellence* Victor Antonio
 - o Personal accountability & having no excuses – introduce LAS KPIs
 - o Following the sales process, knowing your clients & our products/services
 - o Sales Scripts, Qual Check & sales approach by Lead Type
 - o Sales Integrity Training
- Product Training – Event Layout & Succession
 - o Basic Certifications
 - o Master Class Series
 - o Others – LIC, SAG 1 & 2
- Systems & Process Training
 - o Membership site setup and walkthrough – OPTIN to CEO Fireside
 - o SendFuse & Rule of 56 RECAP & training videos
 - <https://getsendfuse.com/sendfuse-training/>
 - o Event Calendar
- Job Shadow & Live Call Monitoring

Day 3:

- Sales Training – Video of *Principles of the Science of Persuasion*
 - o Reciprocity, Scarcity, Authority, Consistency, Liking & Consensus
 - o Application to LAS
- Product Training – Broker Vertical
- Product Selling – Broker Vertical
- Systems & Process Training
 - o Staying Connected
 - Microsoft Outlook – Tips & Tricks
 - Creating Subfolders
 - Setting Rules
 - Staying organized
 - Logins/PW
 - Microsoft Teams
 - Google Chrome – Tips & Tricks
 - Bookmarks
- Job Shadow & Live Call Monitoring

Day 4:

- Sales Training – Video *How to Master the Art of Selling* Tom Hopkins
 - o Key strategies on how to close the deal
- Product Training – Rehab & Wholesaling Verticals – FLIPPING ACCELERATOR
- Systems & Process Training
 - o Keap (CRM)
 - Finalize setup
 - Customize Profile & Set Preferences
 - InfusionSoft Dashboard - Calendar Items, Sales Report, Balance Due Report
 - Contact Record review
- Job Shadow & Live Call Monitoring

Day 5:

- Sales Training – Video *Closing Sales is Easy* Tom Hopkins–
- Product Training – Cogo Capital Introduction
- Systems & Process Training
 - o Cogo Capital Basics:
 - “Sweet Spot” Box
 - Loan Programs – Elite vs. Non-Elite
 - Needs List/Cogo Loan Process
- Job Shadow & Live Call Monitoring

Day 6:

- Sales Training – Video *Words That Sell* Tom Hopkins
- Sales Integrity Training
- Product Training – Lien Abatement Vertical
- Systems & Process Training
 - o RECAP of Week 1
 - Membership Site
 - Event Calendar
 - Microsoft Outlook
 - Microsoft Teams
 - InfusionSoft basics
- Job Shadow & Live Call Monitoring

Day 7:

- Sales Training – Video *Time Tested Closing Techniques* Tom Hopkins
- Product Training – Reverse REO Vertical
- Systems & Process Training
 - o Mitel (Phone System)
 - Outbound Dialing
 - Inbound Call Handling
 - Call Transferring – Warm Transfers
 - Conference Calls
 - Call Monitoring
 - Recording Server – No Access, just availability
 - Reporting
- Job Shadow & Live Call Monitoring

Day 8:

- Sales Training – Video *Master The Art of Overcoming Objections* Tom Hopkins
- Product Training – LIC, SAG, HSCs, SendFuse, Dealio, JV Relationship
- Systems & Process Training
 - o Keap Lead Lists & Dispositions
 - Keap Dashboard 2.0
 - Applying Note Templates
 - o OnceHub
 - o LAS Sales Entry
- Job Shadow & Live Call Monitoring