

ADVANCEMENT GUIDE



FORMULA FOR SUCCESS

We have a proven model for success. Daily tasks including one-on-one time with leaders, making sales calls, prospecting and recruiting. Of course, we work with all our consultants, offering strategy and suggestions on the best way to perform these tasks effectively. We provide on-going coaching and training to help meet your goals and become successful in this career.

DAILY

- Check in with your Senior Account Consultant (SAC) by 8 am CST
- Run all scheduled appointments; call SAC from every appointment
- Check in with your SAC three times a day (morning/noon/afternoon)

PROSPECT

ASK FOR REFERRALS

- Two referrals per appointment

T-CALL

- Five to the left/right/center of each scheduled appointment

MOVING TARGETS

- Vehicles you come in contact with while driving
- Contractors, landscapers, movers, pool companies, roofers

MEDIA

- Billboards, grand openings, direct mail coupons, classified ads

REFERENCES

- Two references per signed agreement

RECRUITING

- Identify/meet two potential recruits
- Utilize Recruiting handouts
- ISIS Pitch – Two-minute overview

ENGAGE WITH OTHER SALES PROFESSIONALS

- B2B Sales (payroll, advertising, insurance Reps and VAR reps)
- Retail Sales (Wireless and furniture reps, sales clerks, kiosk sales)
- Food and Beverage Sales (liquor reps, bartenders, restaurant managers)

DAILY SALES ("A DEAL A DAY")

- Paperwork: Submit all complete deals (includes voided check, SS#, Tax ID and all Signatures)

CONFERENCE CALLS

- Attend weekly Senior Account Consultant Team call
- Attend weekly ISIS National Sales Call

GENERAL EXPECTATIONS

- 30 T-Call prospects per day x 21 working days = **630 prospects**
- 10 moving targets per day x 21 working days = **210 prospects**
- 10 media prospects per day x 21 working days = **210 prospects**
- Total per month = **1050 prospects**
- 5% conversion ratio = **52 presentations**
- 25% close ratio = **13 sales per month**

HOW TO BUILD YOUR TEAM

WHO DO I RECRUIT? INDIVIDUALS LOOKING FOR

- Career change
- Career advancement
- Increased earning potential
- Ability to develop and run a sales office

B2B SALES

- Payroll Reps
- Advertising Reps
- Insurance Reps
- Software/Hardware Sales

RETAIL SALES

- Wireless Reps
- Sales Clerks
- Kiosk Sales
- Auto Sales

FOOD & BEVERAGE

- Food/Beverage Reps
- Liquor Sales
- Restaurant Managers
- Wait Staff/Bartenders

ENTRY LEVEL

- College Graduates
- Family and Friends
- Returning to the workforce

HOW DO I RECRUIT: GIVE A 2-5 MINUTE OVERVIEW OF ISIS DIRECT.

- Generous compensation with benefits
- Building of teams and residuals

THE RECRUITMENT CARD

- Hand them the recruitment card and encourage them to call 800-581-7303. This number will roll over to a recruiter between the hours of 8 am - 5 pm CST.
- Get their contact information in exchange

FOLLOW UP

- The next day, ask about their thoughts after they listened to the call.

ENROLLMENT

- Potential recruits should be enrolled in class immediately.
- If there are objections or questions, address them, and get them into class.

WHEN DO I START RECRUITING?



**Recruiting
is your first
sale! This
should start
DAY ONE.**

90 DAY BUSINESS PLAN

Learn the business

- Pricing Structure
- Products & Services
- Sales Process
- Daily Expectations

Sales goal

- 10 Merchant Accounts
- 5 Funded Leases

Continue to learn the business

Meet and exceed sales goals

- 12 Merchant Accounts
- 5 Funded Leases

Begin to recruit

Continue to learn the business

Maintain sales goals

- 15 Merchant Accounts
- 5 Funded Leases

Build the foundation of your Direct 6

Promotion to Senior Account Consultant

Manage your Direct 6

Receive overrides based on teams production

MONTH 1
POTENTIAL COMP
\$5,100

MONTH 2
POTENTIAL COMP
\$5,400

MONTH 3
POTENTIAL COMP
\$6,150

MONTH 4
POTENTIAL COMP
\$10,000