

GV SOP for Recruitment Flow – Execution Guideline for Leader

Step	Subject	Description	Remark
1	Establish your recruitment goal	<ul style="list-style-type: none"> ▪ Why do you want to recruit? ▪ How many recruits needed? ▪ By when do you want to complete? ▪ How frequent is your recruitment activities? ▪ How do you want to kick start? ▪ What's your preparation? 	<p>Promotion?</p> <p>How many recruits per month?</p>
2	Candidate Profile	<p>To set your candidate criteria</p> <ul style="list-style-type: none"> ▪ Age range ▪ Education level ▪ Working experience ▪ Family background ▪ Sex preference ▪ Race ▪ Character ▪ Transportation etc... 	
3	Recruiting prospect listing	Highlight all your potential list based on the candidate profile set above	Key into system
4	Plan your recruiting activity	Set the recruiting activity either by weekly or monthly basis or include the recruiting activity into your daily activity planning.	Make recruiting activity be your habit.
5	Telephone Script	<p>Get ready your telephone script for making appointment. No selling over the phone.</p> <ol style="list-style-type: none"> 1. Self-introduction 2. Purpose of calling 3. Set the date time venue to meet 	Just secure the appointment.
6	One to One approach	<p>Fact & Feeling finding</p> <ol style="list-style-type: none"> 1. Get to know him or her 2. Check if there is any discontent on existing career or lifestyle 3. Invite for BOP seminar or to meet your leader for further interview 	Do not over sell your career. Be integrity & do not be too eager on recruiting him/her
7	Initial Interview	<p>Get your leader to execute</p> <ol style="list-style-type: none"> 1. Prior to initial interview, get your candidate to fill up the candidate profile form 2. Discuss with your leader before setting this appointment 3. Get a mutual understanding with your leader on handling your candidate 	<p>Get ready below:</p> <ul style="list-style-type: none"> ▪ interview form ▪ meeting room setting ▪ welcome team ▪ GV profile
8	Examination	Arrange the candidate for necessary exams: PCE/CEILLI/TBE	Arrange for personal tuition if needed

9	BOP arrangement	Small scale of BOP (Business Opportunity Program) is preferable which will cover: <ol style="list-style-type: none"> 1. Why change? 2. Why financial planning career? 3. Why with Great Vision? 4. What's the market potential & income potential? (what is in it for me?) 5. How to get started? 	Get a prominent speaker to handle. Work as a team for better outcome.
10	Attend Principal Mandatory program	<ul style="list-style-type: none"> ▪ Enroll the candidate for the mandatory program in order to be contracted. ▪ Check the coming training schedule for FIST via BU head & lookup into the training Google Form. ▪ Refer BU head for the training content. 	Must attend in order to be contracted.
11	Contracted Interview	<ul style="list-style-type: none"> ▪ Reaffirm him on his career ▪ Get his commitment for success ▪ Reveal to him on the mutual expectation ▪ Tell him the dos & don't ▪ Full support given by BU & yourself ▪ Get ready with AIA & GV contracts 	Get the rules from BU heads & tell him your mutual expectation. Check with admin on the necessary forms.
12	Applying for Financing Scheme if needed	Check if he needs financial support (TES/AFS/MBP/Leader/IWAP/ALPHA financing scheme) Inform him on the KPI requirements.	Needs BU head's approval prior to application
13	Business Sales Planning	<ul style="list-style-type: none"> ▪ Leader concern to lead the candidate on how to plan for his/her business. ▪ Get the SOP guide for Business Sales Planning via ACT system ▪ Planning includes; financial goal setting, sales goal setting, prospect listing, shortlisted prospect, telephone approach for appointment making. 	Refer to the step given in the SOP
14	Approaching Skill	BU head or Leader to teach him/her on <ul style="list-style-type: none"> ▪ Basic sales cycle ▪ Telephone skill ▪ Face to face manner ▪ Handling of anticipated challenges ▪ FAQ 	To equip the candidates on basic knowledge and skill
15	90 days Job Sampling	Candidates are required to be on field for at least 90 days. Leader to check & perform the following: <ol style="list-style-type: none"> 1. Joint field work with the candidates 2. Case study & role play with him 3. Activity checking & monitoring 4. Supervision & coaching 5. SIT plan is needed by weekly basis 	SIT plan to check on his activity status, identify his resources, referral, solve his problem.

		Ensure the candidate with 10 cases in 90 days.	
16	BASIC course	Send the candidates to BASIC course conducted by GV talent academy centre to enhance their basic knowledge & skill.	This is a refresh program to enrich the quality of the candidates.
17	Kick Start Program	There are 5 modules in Kick Start Program 1. Fundamental of financial planning 2. Healthcare planning 3. Family income protection planning 4. Debt cancellation 5. Savings for serious money Refer to BU head or GV talent academy centre for the respective slides.	Each Module can be conducted by weekly basis based on BU's choice
18	Next 180 days	1. Approaching & Closing Skills (Sales Cycle, handling challenges, Referral) 2. Generic & Technique Course (submission, underwriting, claim, servicing)	To send the candidate to GV talent academy
19	Performance review	SIT Plan (identify resources, rectify issue, activity monitoring)	BU level
20	CPD hours monitoring	Leader to ensure the candidate acquire sufficient CPD by the 1 st six months (20 CPD) and the 12 months requirement (30 CPD).	Always can check via principal system for the up to date CPD