

## Overlapping Leadership

### Foundation Principles:

You are building a company within a company.

You are in business for yourself, but not by yourself.

Everybody can recruit from day one. Being a recruiter does not make you a leader, you earn leadership. A new person in Primerica is called a recruit and your sole responsibility is to recruit. Once you get your life license, the first commission position is Representative.

A partnership is formed when the leader (upline) and the team member (downline) agree to work together in the building and training processes. You can only coach a person who is ready to be coached. It is a mutual agreement.

A recruit is not a recruit until they have a recruit – that starts the building of their business. The field trainer does the work. The recruit learns by watching and listening. The trainer working with a recruit's recruit is called overlapping leadership. The trainer overlaps the recruiter and helps the trainee. The recruit's goal is to become a certified field trainer. With a license you can learn to be a field trainer. Being a recruiter does not make you a field trainer.

See documentation below on becoming a certified field trainer.

You become a Sr. Representative by adding one direct. This is the first override position. An override occurs when someone on your team under you with a lesser contact level helps a client with a product. The writing agent receives a commission and the upline receives an override commission.

At the second override position, District Leader, you have earned the right to a higher commission because you have learned the skills in the system like Prospecting, Approach, Presentation, Follow Up and Start Up. You have also learned the basic product knowledge needed to communicate with a prospect and develop a client.

The more you learn and the larger you grow your team, the higher the commission you qualify to earn. You will advance to Division Leader and Regional Leader in route to Regional Vice President.

The Regional Vice President (RVP) gets paid the most because they carry the most responsibility. They must have a training program, a communication program, screen sales for appropriateness and accuracy, manage recruits through the licensing processes as well as handle compliance issues.

The RVP is the full-time leader and manager of the baseshop. The team of people at the levels below RVP under a Regional Vice President is called a baseshop.

As a Regional Vice President, you have the ability to earn ownership of your company by meeting the company production and income qualifications.

The leader builds relationships with not only their direct reports, but also with their down line reports. This is overlapping leadership. This can occur within an RVP baseshop, within generations (layers) of RVPs in a hierarchy and from the company. Overlapping leadership occurs through multiple forms such as communication, training, coaching and recognition.

The upline leader has a vested interest in every member of their team whether direct or indirect.

We must edify and understand the Regional Vice President position. They have a responsibility to the company for the actions of the team as a whole. In simple terms, "The buck stops here." The RVP has a personal management philosophy and style that the team follows. The RVP has a responsibility to the team to provide all the tools necessary for success.

Overlapping leadership allows for the leader to coach, mentor, train and guide all team members to success.



## Field Trainers Program

**This program begins after you have completed your first level of training including:**

- 10 Training Presentations with a Leader
- Earn Qualified Sr Representative Promotion or Above
  - Completed and implemented personal plan
  - Successfully presented the Opportunity to your coach
- **Successfully presented the Opportunity to your personal contacts and personal prospects with predicted outcome based on 8-5-3-1**

## 3 Levels of Field Trainers

### Level 1 Trainer:

Can successfully perform: 1<sup>st</sup> Presentations  
Follow Up  
IBA Checklist  
Mobile FNA Data Collection and Input  
PLPP Certified  
Life Licensed (Temp or Permanent)

### Level 2 Trainer:

Can successfully perform: All Level 1 Requirements  
Fast Start Planner  
Mobile FNA Carryback and Close  
FNA Long Form Data Collection  
Qualified District Leader or above  
Permanent Life Licensed (must have to get non-resident license and U4)

### Level 3 Trainer:

Can successfully perform: All Level 1 and Level 2 Requirements  
FNA Long Form Carryback and Close  
SIE Completed  
6 & 63 Licensed