

Rep: \_\_\_\_\_

# IBA Checklist

**1. Discuss the following:**

- Goals \_\_\_\_\_  
\_\_\_\_\_
- Dreams \_\_\_\_\_  
\_\_\_\_\_

**2. Knowledge & Growth**

- Why it works — New Associate brings a Market to the table & a Field Leader brings the Knowledge of the Business

**3. Create a List Using the Memory Jogger**

- Give them plain sheets of paper
- Inspire the recruit by asking... “Who do you know that \_\_\_\_\_?”  
(from the Memory Jogger, their cell phone and FaceBook)

**4. Qualities of a Business Partner**

- Turn the paper over and have them write down the qualities they desire in a business partner.
- Then turn the paper back over and have them identify the people who have these qualities.

**5. Availability Schedule**

- Weekly Schedule – Block out regular commitments

**6. Complete IBA Paperwork**

**7. Collect “Business Partners” phone numbers and Info on “Market Development List”**

**8. Introduce the Inventory Control**

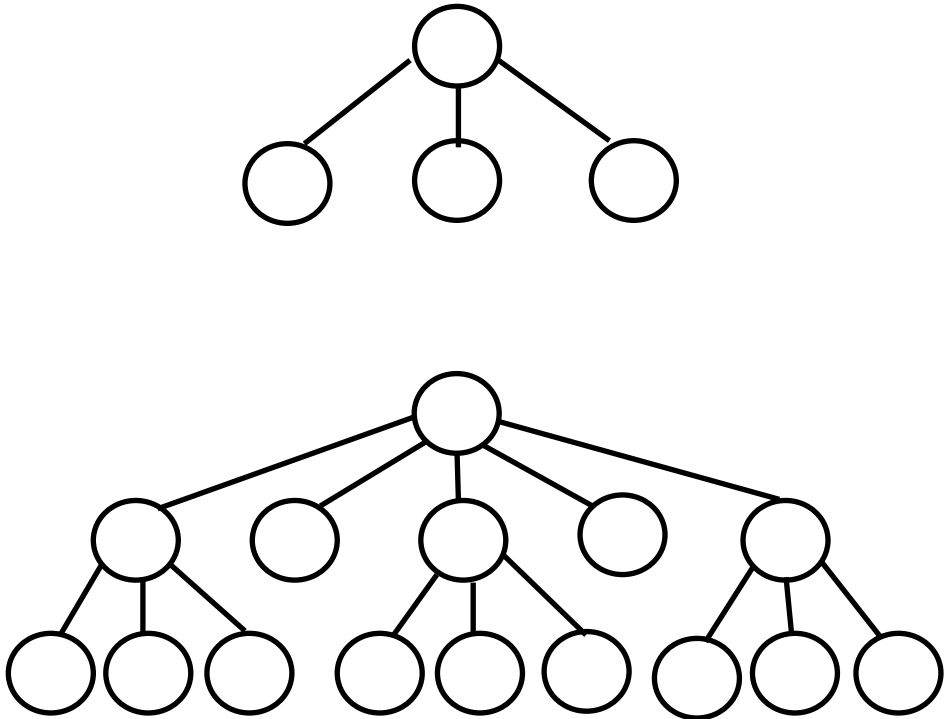
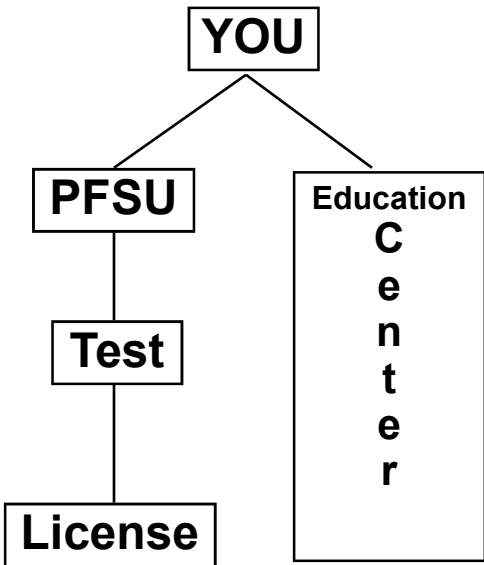
**9. Follow Up**

- Set date & time for next training session: \_\_\_\_\_
- Orientation \_\_\_\_\_
- Set date & time for Personal FNA: \_\_\_\_\_

**10. Fast Start Bonus**

**11. Start Up Guide**

# Knowledge & Growth

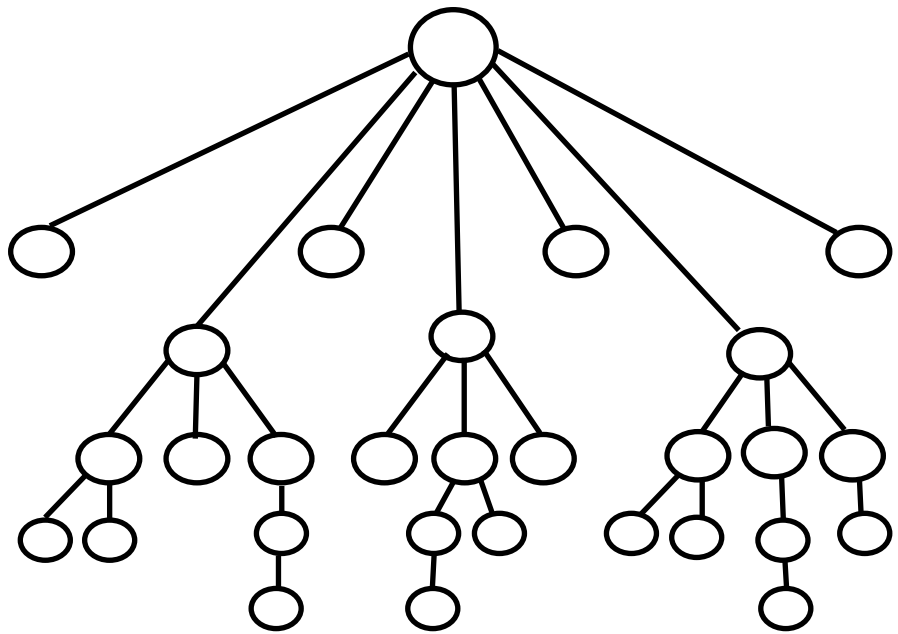


***Knowledge Without Growth Leaves You Without...***

- ◇ Recruits
- ◇ Money
- ◇ Referrals
- ◇ Hands-On Experience  
Building the Business

*“You do the business to learn it- you don’t learn the business to do it.”*

John Addison  
Co-CEO/President  
Primerica





# MEMORY JOGGER

Work with	Boss	Security Guard
Secretary	Caterer	Parking Attendant
Personnel Man	Sales	Repair Man
Copier Man	Inspector	Neighbor
Pick-up Truck	Teacher	Enthusiastic
Ambitious	Management	Delivery Man
Mail Person	Lost job	Laid-off
Hates job	Single parent	Most likable
Engineer	Construction	Wait Person
Hairdresser	Bartender	Minister
Nurse	Dentist	Car Salesman
Just had a baby	Twins	4 Kids
Banker	Painter	Landscaper
Hospital	Realtor	Flower Shop
Health Spa	Fire Chief	Cousin
Sings in choir	Best Friend	Armed Forces
Accountant	Competes	Money
Coach	Politics	Loves to talk
Counselor	Good Cook	Tanning Salon
BMW	Owns Business	Computers
Travel Agent	Service Station	Works 2 jobs
Bookkeeper	Health Food	Fund Raiser
Daycare	Lifeguard	Home Parties
Dance Teacher	Karate	Jogs
Plays Sports	McDonalds	Cashier
Likes Animals	Nail Technician	Smiles all the time

# WEEKLY SCHEDULE

Name: \_\_\_\_\_

Date	Date	Date	Date	Date	Date	Date
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
7 AM	7 AM	7 AM	7 AM	7 AM	7 AM	7 AM
8	8	8	8	8	8	8
9	9	9	9	9	9	9
10	10	10	10	10	10	10
11	11	11	11	11	11	11
12 NOON	12 NOON	12 NOON	12 NOON	12 NOON	12 NOON	12 NOON
1	1	1	1	1	1	1
2	2	2	2	2	2	2
3	3	3	3	3	3	3
4	4	4	4	4	4	4
5	5	5	5	5	5	5
6 PM	6 PM	6 PM	6 PM	6 PM	6 PM	6 PM
7	7	7	7	7	7	7
8	8	8	8	8	8	8
9	9	9	9	9	9	9
10	10	10	10	10	10	10
11	11	11	11	11	11	11

# WEEKLY SCHEDULE

Name: \_\_\_\_\_

Date	Date	Date	Date	Date	Date	Date
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
7 AM	7 AM	7 AM	7 AM	7 AM	7 AM	7 AM
8	8	8	8	8	8	8
9	9	9	9	9	9	9
10	10	10	10	10	10	10
11	11	11	11	11	11	11
12 NOON	12 NOON	12 NOON	12 NOON	12 NOON	12 NOON	12 NOON
1	1	1	1	1	1	1
2	2	2	2	2	2	2
3	3	3	3	3	3	3
4	4	4	4	4	4	4
5	5	5	5	5	5	5
6 PM	6 PM	6 PM	6 PM	6 PM	6 PM	6 PM
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8	8	8	8	8	8	8
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10	10	10	10	10	10	10
11	11	11	11	11	11	11

# PROSPECT LIST

Name: \_\_\_\_\_

	<i>Name</i>	<i>Phone #</i>	<i>Comments</i>
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