

ADVISOR RECRUITMENT FORMS

SM :

Location :

Name of Advisor :

ADVISOR RECRUITMENT FORMS

Advisor Recruitment

STEP 1 PROSPECTING / SPOTTING (SM)

SM identify prospects to interview from various sources

The common sources are:

1. Existing Agents from LIC/GIC/UTI/Small Savings etc.,
2. Financial Services Agents/Distributors
3. Advertisements in local papers
4. Center of influence
5. Referrals
6. Friends

STEP 2 CONDUCT INITIAL INTERVIEW (SM)

Get the Prospects fill & the Specified Application (Discussion Guide) Form.
Screen the Application specific reference to background of the candidate
and short list

Give the Candidate a brief account of

1. A Background of Reliance Life Insurance Company Ltd.
2. Job Profile of Advisor
3. Remuneration Pattern and Benefits

STEP 3 Evaluation of Initial interview and decision

Rate the candidate according to the prefixed guidelines. If found suitable ask the
Candidate to complete the market guide and fix interview with BM.

STEP 4 Final interview with BM

BM should interview using Selection Guide.

Assess the candidate on the dimension of selection (Limra)

Assess the candidate on the sales man criteria.

If found suitable, ask him to fill the agency application form and submit relevant documents.

If found not suitable but BMs recommends, proper justification should be recorded in the remark column at the end of this document.

STEP 5 Update AMS

Update the selected candidates list in the AMS and trigger training process through mail to RTMs.

STEP 6 PRE-TRAINING COUNSELING

Ensure Candidate is fully prepared for Training Course.

Personal Information Form

Ref : Step 2

Date of Interview: _____ **Time:** _____ **Location:** _____

Applicant's Name: _____

Source of Referral: _____

Date of Birth/Age: _____

Address: _____

How long in this area? _____ House Owned/Mortgaged/Rented: _____

Spouse/Partner's Name: _____ Occupation: _____

Children: _____ Ages: _____

Current Occupation: _____ Company: _____

Education:

Level	Year of Passing	%

Work Experience

Name of organization	Designation	Period of working	Reason for leaving

Organizational Activities:

Name of organization/society/trust	designation	Period of working

Insurance owned

Issuing company	Type of Plan	Premium paid

Initial interview evaluation:

	CRITERIA	Yes or No
1.	Aged 25 yrs and above	
2.	Educational qualification - graduate	
3.	Resident in the area for 3 years or more	
4.	Has Social / Cultural/Professional networking	
5.	Sales Experience	
6.	Has personal conveyance.	
7.	Has ability to communicate clearly and effectively	

Candidate should satisfy 5 out of above 7 requirements.

Decision:

- Give market guide and fix interview with BM
- Postpone (reason _____)
- Reject

Discussion Guide: BM/BDM Interview
Applicant's Response

Questions

About Current Occupation

- How long have you been there? _____
- Could you describe exactly what you do in your present job? _____
- Do you have people working for you? _____
- Who do you report to? _____
- What do you like most about your work? _____
- What do you like least about it? (probe for tasks, relationships, hours, future, prospects, income). _____
- What income are you enjoying at present _____
- What income would your next promotion bring? _____
- What income would you like to enjoy within three years time? _____
- Can you generate that income in your present company? _____
- How well does this job make use of your abilities? What are your special abilities? _____
- Do you deal with people in this job? How? _____
- Why are considering changing careers? _____
- Why are you considering a position with us? _____

Previous Occupation

- What were your previous jobs? _____
 - Why did you leave them? _____
 - What was your greatest achievement in your previous job? _____
 - During your career have you ever had any sales experience? _____
 - Have you ever worked for yourself? _____
 - If you could describe your ideal career position, what would it be like _____
 - What are your favorite past time activities? _____
 - Does it involve meeting with people? _____
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SELECTION GUIDE : BM assessment

Name of Candidate :

Ref : Step 4

Date of Interview :

Time :

	<i>Outstanding 5</i>	<i>AbvAvg 4</i>	<i>Average 3</i>	<i>Below average 2</i>	<i>Poor 0</i>
<p>Communication ability Clearly express oneself in formal and informal settings. Express technical concepts/</p>					
<p>Inter personal Skills Listening effectively, maintaining emotional control, presenting effective counter arguments without criticizing or threatening.</p>					
<p>Time Management and administrative ability; Systematically structure one's own activities for effective performance, attention to detail, performance of repetitive tasks, planning, setting priorities, scheduling work</p>					
<p>Ethical and professional Behavior: Belief in the value of the one's services, desire to act in the client's best interest, willingness to improve one's professional standing though continued education.</p>					
<p>Ability to learn and apply procedure and work with facts and figures To read accurately and interpret charts and tables. Perform basic arithmetic.</p>					
<p>Goal and achievement motivation : Ability to set long and short term goals, channels one's own effort towards achieving them. This includes completing tasks that have been started.</p>					
<p>Market Potential: Ability to draw on past experience or acquaintances in order to develop markets. This includes ability to assess both the breadth and depth of potential markets.</p>					

Independence /self reliance:					
Ability to work on one's own without close supervision, reliance on other individuals or dependence on standardized procedures/presentations.					
Technical knowledge:					
Knowledge of insurance products, investment products, tax laws					
Prospecting ability					
Continuously develop and maintain clientele for one's services.					
Final assessment score (should not be less than 30)					

Evaluation of the sales man ship

	Very effective	Good	Need to work
Physical Presentation			
<i>Appearance</i>			
<i>Poise</i>			
<i>Enthusiasm</i>			
<i>Directness</i>			
<i>Eye contact</i>			
<i>Posture</i>			
<i>Gesture</i>			
<i>Facial expression</i>			
Oral Presentation			
<i>Fluency</i>			
<i>Pronunciation</i>			
<i>Variety</i>			
<i>Pitch</i>			
<i>Rate of speaking</i>			
<i>Loudness</i>			

Candidate well prepared? _____

Ideas well presented? _____

Can candidate explain why each major idea was presented that way? _____

REFERENCE – 1

REFERENCE - 2

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Final Recommendation sheet

- Qualified by norms**
- Exempted category**
- Reject**

In case of exempted category BM/BDM's Remarks.

Name & signature of BM/BDM

Name & signature of SM