

# Defining the Seven Steps of Success

## 1. Designation

The Advisor must complete at least one accredited designation. The ARM, CIC and CPCU designations would be optimal.

## 2. Team Sales

Advisor must actively participate in one year of CoRE.

## 3. Sales Leadership

Lead sales meetings, sales education, and participate in the AB Program for at least once year and attain Certified Analytic Broker designation.

## 4. Recruitment

Must have completed one of the two following options:

- a) Recruit one Advisor who completes the 18 month training process **or**
- b) Recruit one Advisor with a minimum book of business of \$300,000

## 5. Employment with BAI for 5 Years

This takes into account all candidates, including Advisors that would be hired with a large book of business. This could be waived if the Advisor is seasoned and has the possibility to be recruited as a Regional Vice President.

## 6. Maintain a \$600,000 Book of Business

Advisor must maintain a \$600,000 book of business across all lines.

## 7. Endorsement from Management

Advisor must be “nominated” by the Sales Leader (Jim Rose) to be considered as a potential Regional Vice President. In addition, one member of the Executive Team would have to second the nomination and ultimately come to a unanimous vote.

# The Seven Steps of Success

