

New York Life STC/XCEL Partnership Kick-off

December 2020



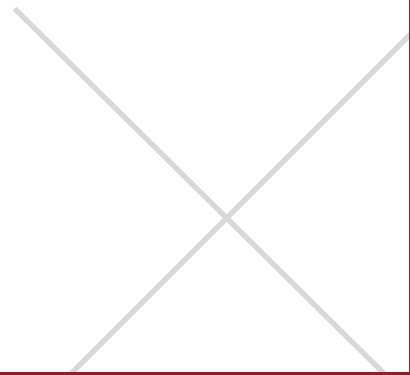
STC/XCEL Designated Support Staff



Callie Salvisburg Castles
Customer Success Manager



Patrick Fraley
XCEL Vice President, Operations



Agenda

- Welcome/Program Kick-Off
- STC/XCEL Support Team Introductions
- Candidate Enrollment Process
- Candidate Materials & Study Best Practices
- Partner & General Office Reports
- Next Steps


Candidate Pre-Licensing Enrollment Process



XCEL – Candidate Enrollment Flyer


XCEL Enrollment Page:

1. Using the Partner Flyer, Select “Click Here to Begin Student Registration”
2. Save the PDF on your Desktop for easy Enrollment




INCLUDED STUDY MATERIALS:

Insurance Pre-licensing Education



- 1 [CLICK HERE TO BEGIN STUDENT REGISTRATION](#)
- 2 Select **ENGLISH** or **SPANISH** Insurance Pre-Licensing Bundle
- 3 Select the course **Life & Health Pre-licensing**
- 4 Apply the following **discount code:**
- 5 Click **SIGN UP** to create the **NEW STUDENT ACCOUNT**
 - Only enter the *REQUIRED* student info
 - Reviewing & verifying that the student info is correct will complete the registration process
 - A welcome email will be instantly sent to help get started



Pre-licensing Course
After all chapters are complete, take the practice pre-certification exam
Then, the course's actual Certification Exam will become visible under "My Courses"



Prep Review Course
This review course will go over every key concept & question to remember for the state licensing exam



State Exam Simulator
These full-length practice tests will simulate the state licensing exam to help get into test day mode

New York Life Candidate Enrollment Landing Page

Securities Training Corporation

Welcome to the New York Life Ordering Site for Exam Licensing Training

NEW YORK LIFE

Select the current course path for

Insurance Insurance (Illinois)

Resource Center

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XCEL Enrollment Page:

1. Select “Insurance” to Enroll Candidates in XCEL Pre-Licensing Course
2. Book Mark Enrollment Site for easy Candidate Enrollment –
 - http://info.stcusa.com/new_york_life_enrollment_page

Select English or Spanish

XCEL
an STC Company

Search Login

SELECT YOUR COURSE

Alphabetical


- INSURANCE ENGLISH PRE-LICENSING BUNDLE COURSES 99+
- INSURANCE SPANISH PRE-LICENSING BUNDLE COURSES 69


Select Candidate's State of Study

The screenshot shows a web interface for selecting a course. At the top, there is a navigation bar with a magnifying glass icon, the text "SELECT YOUR COURSE", and a breadcrumb "INSURANCE ENGLISH PRE-LICENSING BUNDLE COURSES". To the right of the breadcrumb is a dropdown menu set to "Alphabetical" and a grid icon. Below the navigation bar is a list of course folders, each with a folder icon, the state name followed by "Insurance", and a blue circular button with the number "3".


State	Count
Alabama Insurance	3
Alaska Insurance	3
Arizona Insurance	3
Arkansas Insurance	3
California Insurance	3
Colorado Insurance	3
Connecticut Insurance	3
Delaware Insurance	3


Select Pre-Licensing Bundle

 [SELECT YOUR COURSE](#) ▶ [INSURANCE ENGLISH PRE-LICENSING BUNDLE COURSES](#) ▶ California Insurance





California Life and Health Pre-licensing
Online Course + applicable state

[GO TO CART](#) 




California Life Pre-licensing
Online Course + applicable state

[GO TO CART](#) 



California Health Pre-licensing
Online Course + applicable state

[GO TO CART](#) 

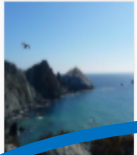
XCEL Enrollment Page:

1. Select the Pre-Licensing Course –
 1. Life & Health
 2. Life Only
 3. Health Only
2. Select “GO TO CART”

Select Pre-Licensing Bundle

1. Enter your Partner Discount Code from Enrollment Flyer
2. Select “Apply” Discount Code
3. Price will drop to \$0
4. Select “Proceed to Checkout”

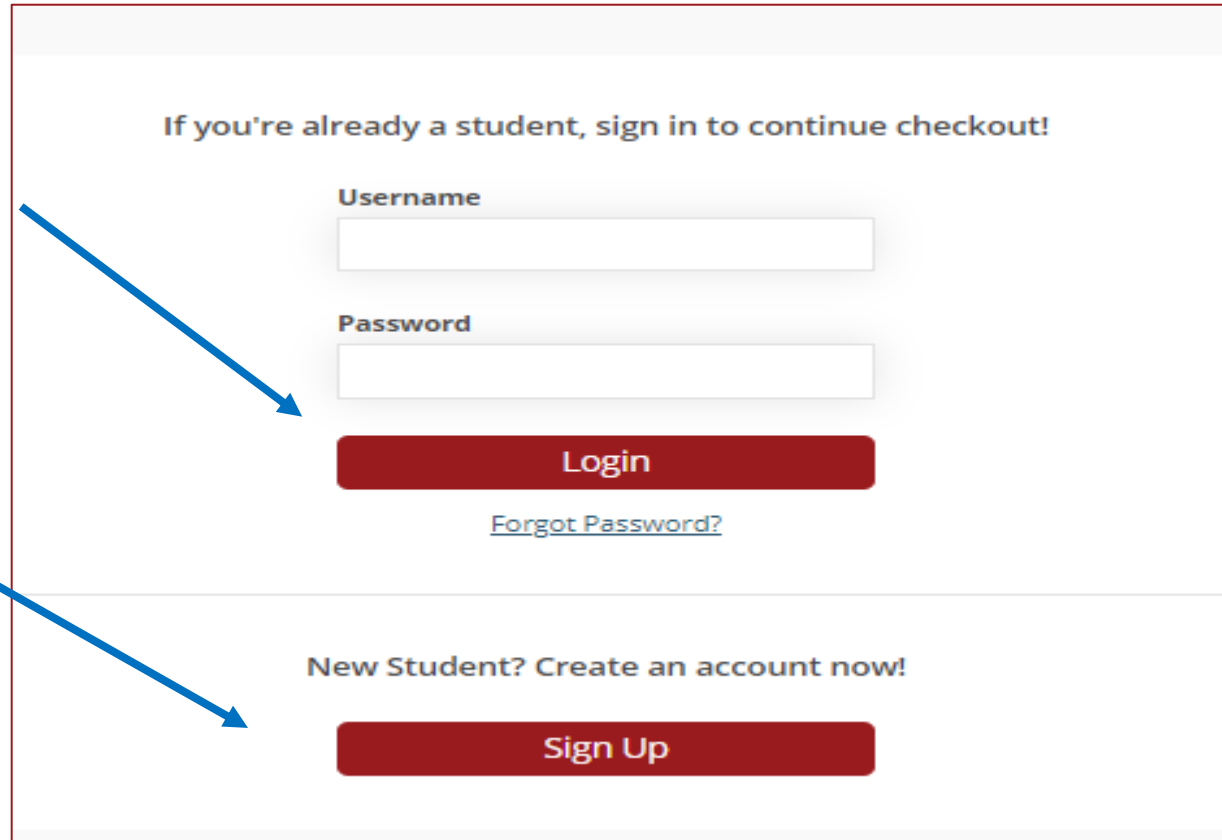
The screenshot shows a shopping cart interface with three tabs: 1: CART, 2: STUDENT ACCOUNT INFORMATION, and 3: PAYMENT. The '1: CART' tab is active. A 'Continue Shopping' link is visible. The cart contains one item: 'California Life Pre-licensing Online Course + applicable state reporting fees' with a price of \$205.00, a quantity of 1, and a subtotal of \$205.00. Below the item list, there is a 'Discount Code' input field and an 'Apply' button, both highlighted with a blue oval. To the right, the 'Subtotal' section shows 'Total (includes applicable state reporting fees):' and a red 'Proceed to Checkout' button, which is also highlighted with a blue arrow.

Item	Price (includes applicable state reporting fees)	Quantity	Subtotal
 California Life Pre-licensing Online Course + applicable state reporting fees	\$205.00	1	\$205.00

Discount Code

Subtotal
Total (includes applicable state reporting fees):

Select Sign Up New Student (Candidate)



If you're already a student, sign in to continue checkout!

Username

Password

Login

[Forgot Password?](#)

New Student? Create an account now!

Sign Up

The image shows a login and sign-up form. Two blue arrows point from the left side of the slide to the 'Login' button and the 'Sign Up' button respectively.

Select “New Student (Candidate)” to create a new XCEL candidate Account.

If the Candidate is already Enrolled in XCEL materials and need to Enroll in additional materials, select “Login”.

Complete *Required* Candidate Account Information

Candidate Account Information Form

STUDENT ACCOUNT INFORMATION	STUDENT CONTACT INFORMATION	Additional Information
First Name <i>Required</i>	Address <i>Required</i>	Location
<input type="text"/>	<input type="text"/>	<input type="text"/>
Middle Name	Address 2	Branch/ Office Location
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name <i>Required</i>	Country <i>Required</i>	Hiring Manager
<input type="text"/>	Country <input type="text"/>	<input type="text"/>
Username <i>Required</i>	State/Province <i>Required</i>	Hiring Manager's Email
<input type="text"/>	State/Province <input type="text"/>	<input type="text"/>
Email <i>Required</i>	City <i>Required</i>	
<input type="text"/>	<input type="text"/>	
Password <i>Required</i>	Postal/Zip Code <i>Required</i>	
<input type="text"/>	<input type="text"/>	
Re-enter Password <i>Required</i>		
<input type="text"/>		
Phone Number <i>Required</i>		
<input type="text"/>		
		Proceed to Checkout

Please complete only the REQUIRED fields to set-up a new Candidate Account.

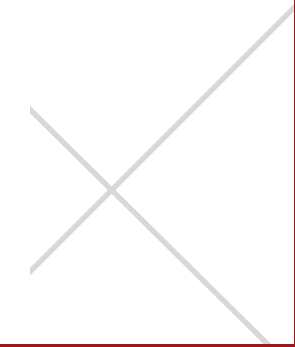
Username & Password are set during Candidate Account set-up.

- Keep Passwords general for each Partner
- Usernames can be Candidates email address
- Candidates reset Password once in Homeroom.

Please review Completed Form before selecting "Proceed to Checkout"

Complete Candidate Account Information Example

STUDENT ACCOUNT INFORMATION	STUDENT CONTACT INFORMATION	Additional Information
First Name <i>Required</i> Callie	Address <i>Required</i> 501 N Broadway	Location <input type="text"/>
Middle Name <input type="text"/>	Address 2 <input type="text"/>	Branch/ Office Location <input type="text"/>
Last Name <i>Required</i> Castles	Country <i>Required</i> United States ▲	Hiring Manager <input type="text"/>
Username <i>Required</i> callie.castles@colibrigroup.com	State/Province <i>Required</i> Missouri ▲	Hiring Manager's Email <input type="text"/>
Email <i>Required</i> callie.castles@colibrigroup.com	City <i>Required</i> Saint Louis	
Password <i>Required</i> NYL2020	Postal/Zip Code <i>Required</i> 63102	
Re-enter Password <i>Required</i> NYL2020		
Phone Number <i>Required</i> 2124852376		<input type="button" value="Proceed to Checkout"/>



Candidate Enrollment Email

Candidate Username and Password will be what was entered during the XCEL New Candidate Enrollment Process.

The link to the XCEL Platform -
<https://xcelsolutions.myabsorb.com/#/login>

[EXTERNAL] Your XCEL Solutions Profile



XCEL Solutions <noreply@myabsorb.com>

To Callie Castles

Hi Callie Castles

We want to thank you for choosing XCEL Solutions's for your education needs.

Username: callie.castles@colibrigroup.com

To access your courses please go to xcelsolutions.myabsorb.com



Keep a copy of this message to remember your username.

Simply login and you will have access to all of your insurance courses.

Select My Courses to access and start your courses.

Select Resources to access additional study materials including study and test tips, cliff notes, candidate handbooks or bulletins, and how to register for your state exam.

This email was generated by the XCEL Solutions System. Please do not reply to this email.

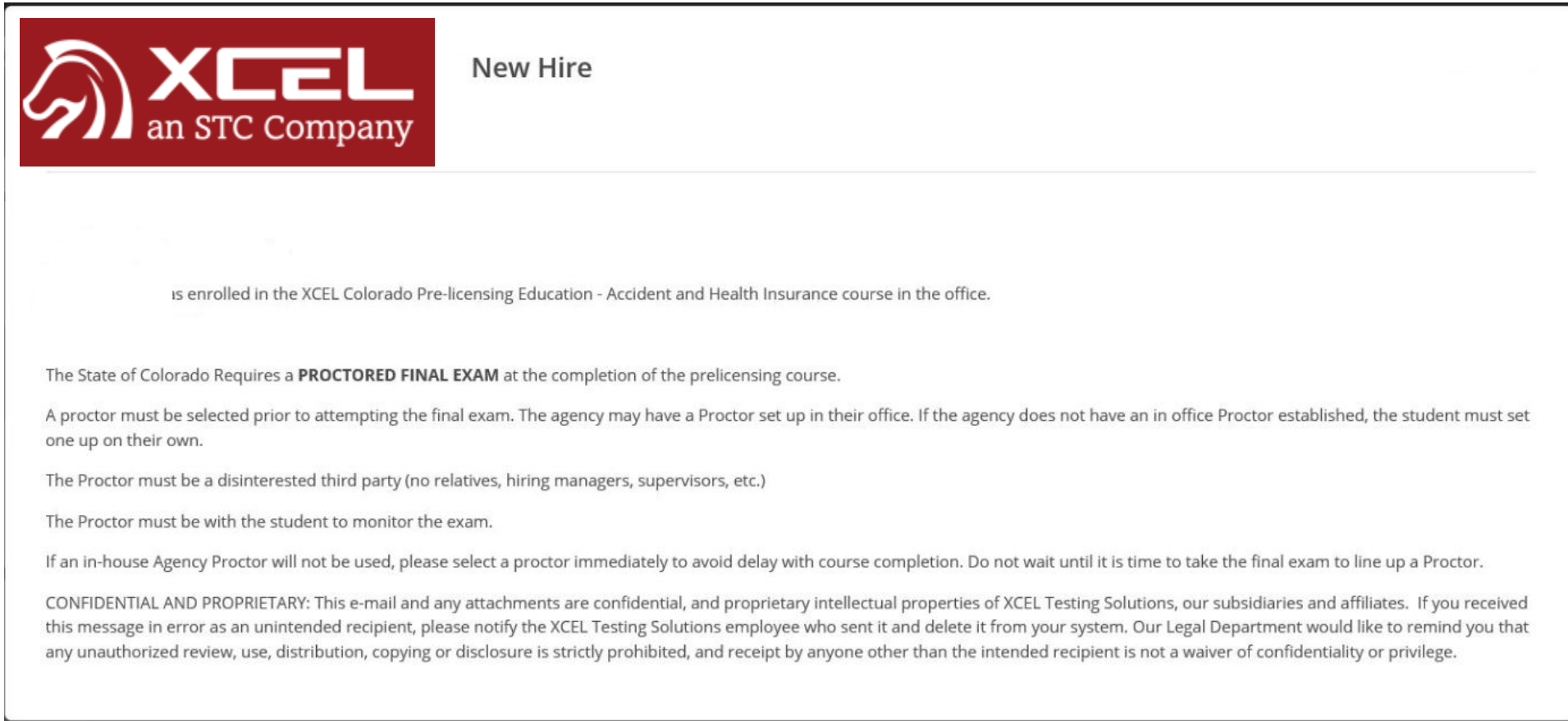
Good luck with your course!

XCEL Solutions

904-999-4923

support@xcelsolutions.com

Partner Enrollment Email – Varies by State



Candidate Log-In Screen



Login

Login below to see all your courses.

Username

Password

Login

Keep me logged in [Forgot Password?](#)

- Once Candidate has received their Enrollment email, they will be prompted to Log-In.
 - **Candidate Username and Password will be what was entered during the XCEL New Candidate Enrollment Process.**
- Candidates should bookmark the Log-In Page:
 - <https://xcelsolutions.myabsorb.com/#/login>

Candidate Dashboard

ONLINE
State Exam

XCEL
an STC Company

Coronavirus/COVID-19 Update

At XCEL, the safety of our students and employees is our top priority, and we're closely monitoring the coronavirus (COVID-19) situation.

Please [CLICK HERE](#) for answers to frequently asked questions.

psi
Click Here to S

RESUME
Nothing to resume yet

My Courses
See courses you are enrolled in

Resources
Course-specific resources can be found inside your course.

Transcript
View Transcript

Latest News
Keep up to date on all the hottest news.

Pennsylvania Insurance Exams	5 months ago
PROMETRIC - TEST SITES OPEN	5 months ago
Prometric - Site Openings Update	5 months ago

FAQ
The answers to your questions

- How do I schedule my state exam?
- Reset/Forgot Password?
- How can I extend my course?
- How do I submit my affidavit?
- I'm having internet connection issues is there anything I can try besides up...

Inbox
Your priority messages **0**

You currently have no messages.

Live Virtual 2-Day Review
Click here to select your class dates

Candidate Experience – XCEL Study Best Practices



XCEL Candidate Experience – 3 Part Proven Best Practices

Course Content

Courses
You must complete 3 of the following course(s).

1 of 3 Course(s)

<input checked="" type="checkbox"/>	Pennsylvania Life and Health Pre-	Online Course + applicable state...	Requirements Completed
<input type="checkbox"/>	Pennsylvania Prep Review Course -	Online Course + applicable state...	Launch
<input type="checkbox"/>	Pennsylvania State Exam Simulator -	Online Course + applicable state...	Launch

Get started - three part training

Before you start your training course, it's important to understand the steps necessary to pass the state examination on the **first attempt**. XCEL Solutions offers a unique three-step training program instructionally designed to **prepare people to pass** on the first attempt. There are three parts to the training: Pre-licensing Course, Prep Review Course, and Exam Simulator.

Part 1: Pre-licensing course

The Pre-Licensing Course will satisfy all state insurance pre-license requirements, allowing everyone to attempt the state insurance exam. Completing this section very quickly is critical (5 days or less). Upon completion, you gain access to the Prep Review Course (Part 2) and Exam Simulator (Part 3).

Part 2: Prep Review Course

This part of the training features content "boiled down to the essence" of the state exam. Chapters have only a few pages of material, but the content must be mastered to pass. Instructionally designed to teach individuals how to pass, most study effort should be invested here. Unnecessary information has been eliminated. Chapter exams are substantially larger (50+ questions), providing exposure to the types of questions seen on the state exam. **IMPORTANT: Most study effort (50% or greater) should be devoted exclusively to the Prep Review Course.**

Part 3: Exam Simulator

These special exams are designed to gauge content retention levels. Exams are comprised entirely of questions known or historically seen on state examinations. **IMPORTANT: Only take the Exam Simulators after the Prep Review Course has been successfully completed. It ensures these questions will be "fresh in the mind".**

*Some States require a minimum amount of study time. XCEL ensures you meet those times as you navigate through the Pre-licensing course.

Candidate Experience

Part 1 – Pre-Licensing & Certification Exam



Part 1 -Pre-Licensing Course

Watch Intro Video



Read Chapter of Study Material



Watch Chapter Summary Video



Take Chapter Exam

The screenshot shows the XCEL course interface for "Ohio Course Bundle - Life and Health Insurance". The course is titled "1 - Basic Principles of Life and Health Insurance" and consists of 4 lessons. The lessons listed are:

- Introduction Video (Complete)
- Basic Principles (Complete)
- Summary Video (Complete)
- Chapter Exam - Basic Principles (Complete)

Each lesson entry includes a checkmark icon, the lesson title, and a "Complete" button. Below each lesson, it says "Requirements Completed".

Continue this process until all Chapters and Chapter Exams have been completed

Part 1 - Certification Exam*

*If State Required

Upon successful completion of the Certificate Examination, it automatically loads in multiple locations within the training course for EASY access

The screenshot shows the XCEL training course dashboard. At the top left, there is a navigation menu with 'ONLINE' and 'State Exam' options. The main header area features the XCEL logo (an STC Company) and a 'Coronavirus/COVID-19 Update' section with a 'psi' logo and a 'Click Here to S...' button. Below the header is a grid of dashboard tiles: 'RESUME' (Nothing to resume yet), 'My Courses' (See courses you are enrolled in), 'Resources' (Course-specific resources can be found inside your course), and 'Transcript' (View Transcript). A 'Latest News' section lists updates from 5 months ago, including 'Pennsylvania Insurance Exams', 'PROMETRIC - TEST SITES OPEN', and 'Prometric - Site Openings Update'. There is also an 'FAQ' section with questions like 'How do I schedule my state exam?' and 'How do I submit my affidavit?'. An 'Inbox' section shows 'You currently have no messages.' and a 'Live Virtual 2-Day Review' section with a 'Click here to select your class dates' link. On the right side, a sidebar menu is visible with icons for search, messages, user profile, and a hamburger menu. The menu items are: 'You are logged in as: MO Demo', 'Messages', 'Dashboard', 'My Courses', 'Resources', 'Transcript', and 'Log Off'. A blue arrow points to the 'Transcript' option in the sidebar menu.

Candidate Experience

Part 2 – Prep Review Course



Part 2 - Prep Review Course

XCEL Candidate Homeroom – Prep Review Course Card

The screenshot displays three course cards, each with a checkmark icon, a title, a 'Complete' button, and a status indicator. The first card is for 'Basic Principles', the second for 'Summary Video', and the third for 'Chapter Exam - Basic Principles'. All three cards show ': Requirements Completed'.

✓ Basic Principles	Complete	: Requirements Completed
✓ Summary Video	Complete	: Requirements Completed
✓ Chapter Exam - Basic Principles	Complete	: Requirements Completed

Chapter Exams with PREP REVIEW Course

- Chapter exams are substantially larger, testing the candidate's true level of retention
 - "Drill and Kill" approach on KNOWN exam questions
 - Explanations are provided immediately upon exam question completion
 - Chapter Exams can be taken multiple times, allowing students to truly master the materials
 - Reviews ALL Key Facts for State Exam

NOTE: Candidates can move freely between Chapters, focusing on areas where they need extra attention. The course doesn't require students to complete it in order.

Candidate Experience

Part 3 – EXAM Simulator



Part 3 - Exam Simulator

Comprised of KNOWN or Historically Seen Exam Questions

- Comprehensive Exams
- Each exam must be completed in order
- Requires students to obtain an 85% passing grade before advancing to next exam
- Third Simulator is Weighted and Timed, like the actual State Exams

▲ Missouri Life and Health Insurance State Exam Simulator 0 Lesson(s)

▲ 1 - State Exam Simulator - 200 Questions Practice Exam 1 Lesson(s)

Exam Simulator - Missouri Life and Health Insurance State Exam Simulator

:: Items completed

2 - State Exam Simulator - 145 Questions Weighted Exam

Exam Simulator - Missouri Life and Health Insurance State Exam Simulator

:: Not Started

Missouri 170 Questions Weighted Real Time Exam

Exam Simulator - Missouri Life and Health Insurance State Exam Simulator

:: Not Started

Question 7 Select the appropriate response

If a group endorses an accident and health insurance product in an advertisement, the public must be made aware of

The names of the group members

The number of group members

Any control by the insurer over the group

Whether the group members are insured

193 of 200 Questions Remaining

Proceed

✘ Incorrect. The correct answer is "Any control by the insurer over the group". If a group endorses an accident and health insurance product in an advertisement, the public must be made aware of any control by the insurer over the group.

Candidate Experience

Additional Candidate Resources



Candidate Resources

Additional Candidate Resources Include:

- Downloadable & Printable State Licensing Handbook.
- Link to Schedule Your Exam
- Downloadable & Printable Cliff Notes

Course Content **Resources**

Resources

[Download All](#)

- 1. Ohio Candidate Licensing Handbook [Open](#)
- 2. Schedule your Exam [Open](#)
- 3. Cliff Notes - Life Insurance [Open](#)
- 4. Cliff Notes - Accident and Health Insurance [Open](#)
- 5. Cliff Notes - Ohio Laws and Rules [Open](#)
- 6. Common errors for state exam [Open](#)

Requirements Completed
7/77

100%

Competencies

- [Ohio Health Insurance Level 1](#)
- [Ohio Life Insurance Level 1](#)

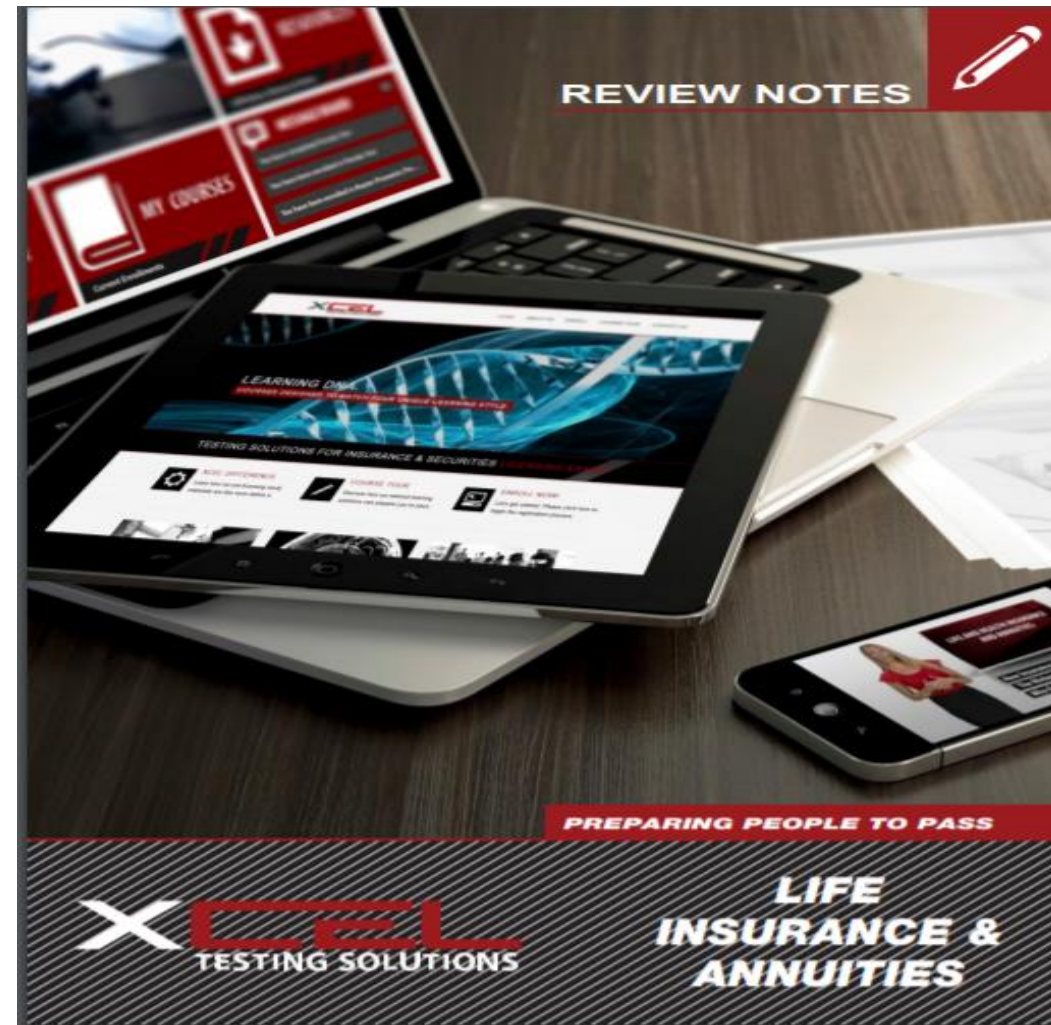
Tags

- Insurance
- LAH

Resources

Cliff Notes

- The Cliff Notes represent a detailed summary of the “must-know” facts and are broken down by Chapter
- This digital “cheat sheet” is perfect as a final review in the days leading up to the regulatory exam.



Live Virtual LAH Classes

The screenshot displays the XCEL Candidate Dashboard. At the top left, there is a navigation menu with 'ONLINE' and 'State Exam' options. The main content area features a 'Coronavirus/COVID-19 Update' section with the XCEL logo and a 'psi' logo. Below this are four main dashboard tiles: 'RESUME' (Nothing to resume yet), 'My Courses' (See courses you are enrolled in), 'Resources' (Course-specific resources can be found inside your course.), and 'Transcript' (View Transcript). At the bottom, there are three smaller tiles: 'Latest News' (Keep up to date on all the hottest news. with links for Pennsylvania Insurance Exams, PROMETRIC - TEST SITES OPEN, and Prometric - Site Openings Update), 'FAQ' (The answers to your questions. with links for scheduling, password reset, course extension, and affidavit submission), and 'Inbox' (Your priority messages. with a notification of 0 messages). A blue oval highlights the 'Live Virtual 2-Day Review' tile, which includes a camera icon and the text 'Click here to select your class dates'.

- Candidates will have the ability to attend a Live Virtual 2-Day Class
- Candidates will select the Live Virtual 2-Day Review tile directly from their XCEL Candidate Dashboard

Virtual Class Enrollment Process

▲ Virtual Class - Select your live review dates 1 Lesson(s)

Click launch to select your live review dates Start

: Not Started



Question 1 Select the appropriate response

Please select the virtual session you would like to attend.

December 1 & 2

December 15 & 16

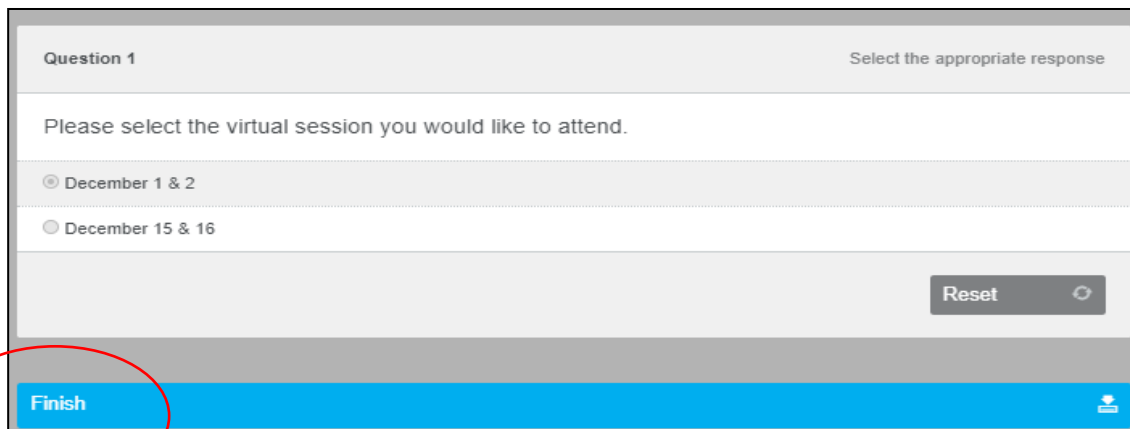
Submit Response ✓

Step # 1 - Candidates will select “Start”

Step #2 – Candidates will Select the Virtual Session that works best for their Schedule and “Submit Response”

- Classes offered twice monthly

Virtual Class Enrollment Process



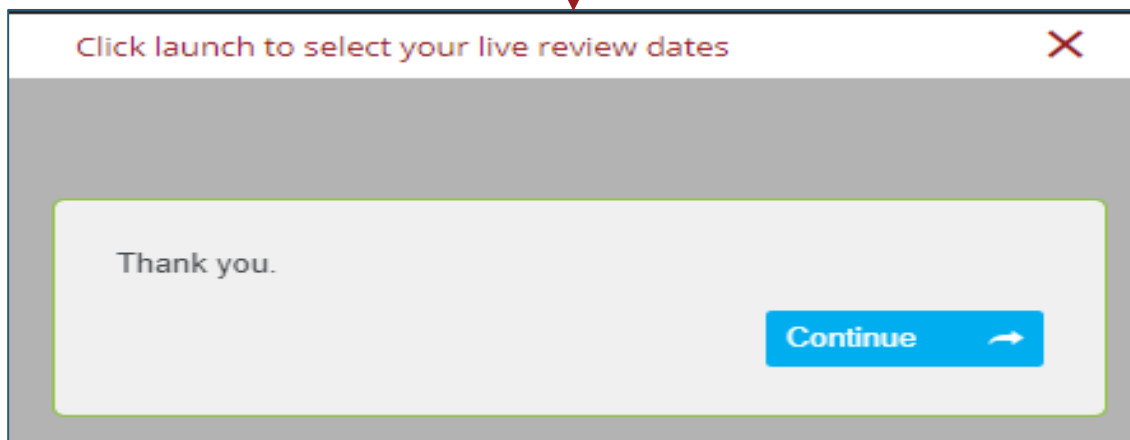
Question 1 Select the appropriate response

Please select the virtual session you would like to attend.

December 1 & 2

December 15 & 16

Step # 3 - Candidates will select “Finish”

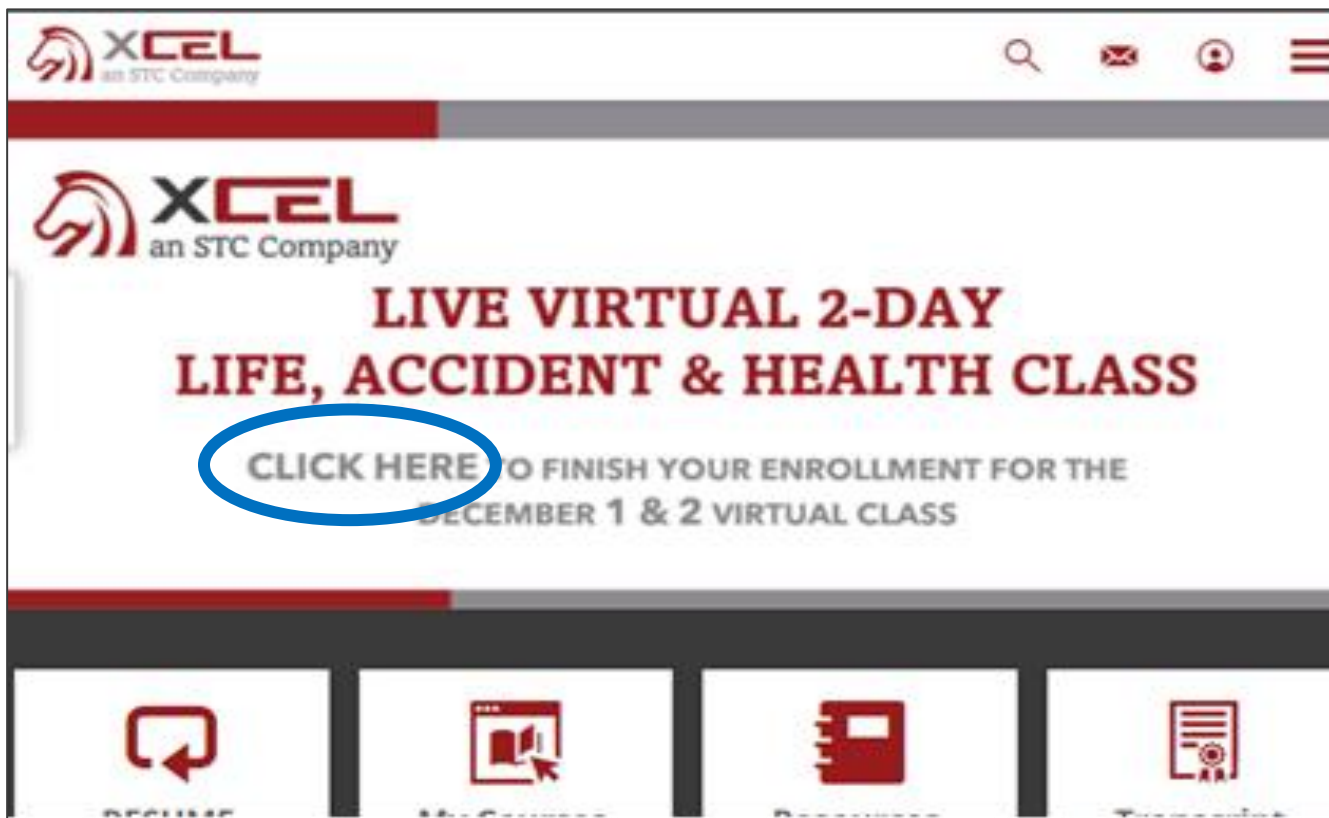


Click launch to select your live review dates ✕

Thank you.

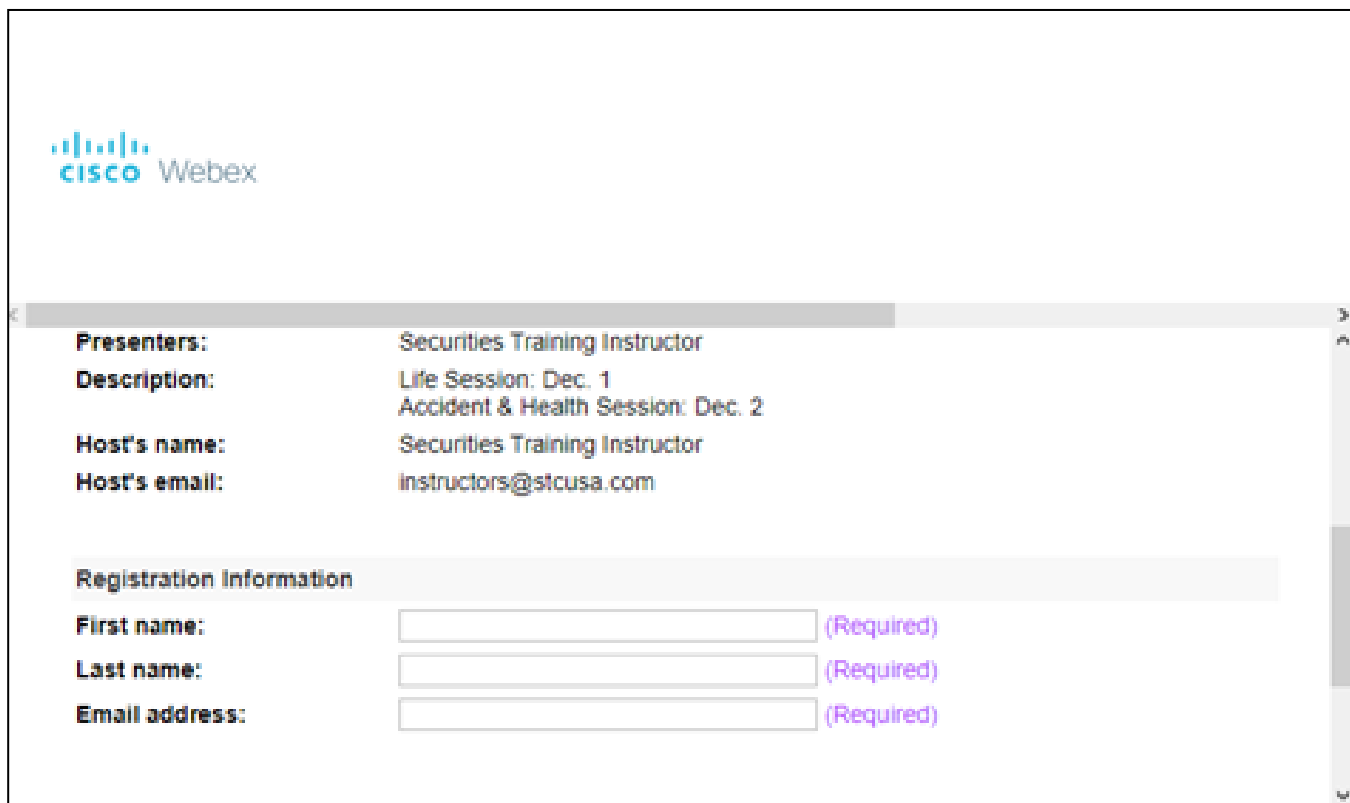
Step #4 – Close the Submission Box to return to Candidate Dashboard

Virtual Class Enrollment Process



Step # 5 – From Candidate Dashboard, select “Click Here” to complete the Class Enrollment.

Virtual Class Enrollment Process



The screenshot shows a Cisco Webex registration interface. At the top left is the Cisco Webex logo. Below it, a scrollable area contains the following information:

Presenters:	Securities Training Instructor
Description:	Life Session: Dec. 1 Accident & Health Session: Dec. 2
Host's name:	Securities Training Instructor
Host's email:	instructors@stcusa.com

Below this information is a section titled "Registration Information" which contains three input fields, each with a "(Required)" label:

First name:	<input type="text"/>	(Required)
Last name:	<input type="text"/>	(Required)
Email address:	<input type="text"/>	(Required)

Step #6 – Complete the WebEx Registration Information.

Step #7 – Candidate will receive confirmation Email for the Review Class Selected 2 days before Class start date.

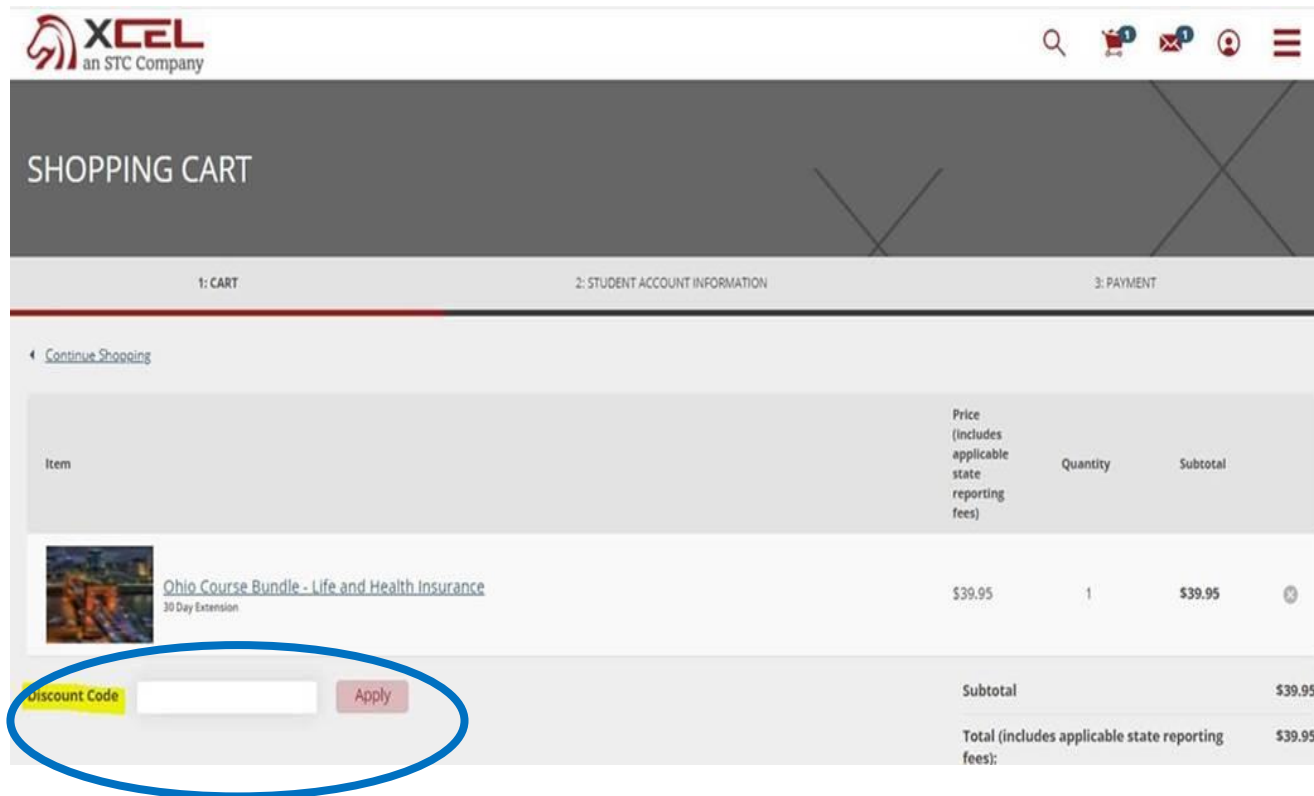
Candidate Extension Process

The screenshot displays the XCEL website interface for a course titled "Life and Health Insurance". At the top, the XCEL logo is visible. A yellow banner below the course title states "This course expires on: Thursday, December 31, 2020". A "GO TO CART" button is circled in blue. Below the banner, the "Course Content" section shows a list of three courses. The first course, "Pennsylvania Life and Health Pre-", has a "Requirements Completed" badge. The other two courses, "Pennsylvania Prep Review Course -" and "Pennsylvania State Exam Simulator -", have "Launch" buttons.


If Candidates need additional time with their XCEL materials:

1. Candidate will open the expired Course
2. Candidate will add the Additional Time to their Cart

Candidate Extension Process



The screenshot shows the XCEL Shopping Cart interface. At the top left is the XCEL logo (an STC Company). The page title is "SHOPPING CART". Below the title is a progress bar with three steps: "1: CART", "2: STUDENT ACCOUNT INFORMATION", and "3: PAYMENT". A "Continue Shopping" link is visible. The main content area contains a table with the following items:

Item	Price (includes applicable state reporting fees)	Quantity	Subtotal
 Ohio Course Bundle - Life and Health Insurance 30 Day Extension	\$39.95	1	\$39.95
Subtotal			\$39.95
Total (includes applicable state reporting fees):			\$39.95

Below the table, there is a "Discount Code" field with an "Apply" button. This field and button are circled in blue in the image.

3. Candidate will enter the discount code **“NYLEXT30”**

4. The Price will drop to \$0.

5. Candidate proceeds to Checkout.

6. 30 Additional days of access are added to Candidate's materials.

Extension Code can be used as many times as need

Partner & General Office Reporting



Partner & General Office Reports: Interpreting the Data

INTERPRETING THE DAILY PROGRESS REPORT

**The daily report will be automatically emailed to you every morning before 9:00 EST.*

To correlate with the 3 parts of our course, the daily report will show where each candidate falls in his studies (% of completion) with respect to each of the course's 3 parts:

- Pre-Licensing Education Course (part 1) = denoted on the daily report as **PLE**
- Prep Review Course (part 2) = denoted on the daily report as **Prep**
- State Exam Simulators (part 3) = denoted on the daily report as **Sim**

Our "**Prepared to Pass**" indicator assesses the candidate's level of "test readiness" based on his performance in the most heavily-weighted chapters as they relate to the state licensing exam:

NOT PREPARED – Less 100% of Prelicensing Education Course

GETTING CLOSER – 100% of the Prelicensing Education Course course completed

ALMOST THERE - 100% PREP REVIEW or 100% SIMULATORS or
(67% SIMULATORS and 50% PREP REVIEW)

PREPARED TO PASS - (50% PREP REVIEW and 100% SIMULATORS) or
(100% PREP REVIEW and 67% SIMULATORS)

Algorithm aside, you more or less want them in **green** or **blue** prior to testing. **Yellow** denotes that the student has met the state's education requirements and are eligible to take the state exam.

Pipeline Activity Summary

- Student Activity Summary from last 30 days
- Each Partner will have their own report showing only their students

Student Progress Summary

- Broken into 3 parts
 - Pre-licensing Education
 - Prep Review Course
 - State Exam Simulators
- Prepared to Pass reporting
- Time Spent in Course Visibility

XCEL Daily Partner Report – Pipeline and Student Progress

Pre-Licensing: Life and Health (Disability)

Date Enrolled	Last Log In	Time Spent	% PLE Complete	PLE Date Completed	First Name	Last Name	Phone	Email	Course	Hiring Manager	% Prep Complete	% Sim Complete	Prepared to Pass
08/17/2020	08/17/2020	0 hrs 0mins	0%	-	Student First Name, Last Name, Phone Number & Email Information				New York Life and Health Pre-licensing		-	-	NOT PREPARED
08/12/2020	08/18/2020	14 hrs 10mins	36%	-					New York Life and Health Pre-licensing		-	-	NOT PREPARED
08/05/2020	08/09/2020	1 hrs 17mins	5%	-					New York Life and Health Pre-licensing		-	-	NOT PREPARED
07/29/2020	08/12/2020	36 hrs 23mins	100%	08/12/2020					New York Life and Health Pre-licensing		0%	33%	GETTING CLOSER
07/24/2020	07/31/2020	4 hrs 9mins	96%	-					New York Life and Health Pre-licensing		-	-	NOT PREPARED
									New York Life and Health Pre-licensing		0%	0%	GETTING CLOSER
									New York Life and Health Pre-licensing		100%	100%	PREPARED TO PASS
									New York Life and Health Pre-licensing				

Pipeline Activity Summary

Department	Enrolled Last 30 Days	Enrolled Last 7 Days	Active Last 10 Days	Active Pipeline	% Completed
Partner Name	9	5	12	13	33%

XCEL Daily General Office/Managing Partner Report – Pipeline and Student Progress

Pipeline Activity Summary

Department	Enrolled Last 30 Days	Enrolled Last 7 Days	Active Last 10 Days	Active Pipeline	% Completed
Partner Name	2	0	1	3	100%
Partner Name	1	0	1	1	0%
Partner Name	1	0	3	3	33%
Partner Name	1	1	1	1	0%
Partner Name	3	0	3	4	67%
Partner Name	9	2	6	11	33%
Partner Name	0	0	1	1	0%
Partner Name	2	0	2	2	50%
Partner Name	2	0	4	4	25%
Total	21	3	22	30	36%

Hiring Manager	% Prep Complete	% Sim Complete	Prepared to Pass
	-	-	NOT PREPARED
	-	-	NOT PREPARED
	-	-	NOT PREPARED
	0%	33%	GETTING CLOSER
	-	-	NOT PREPARED
	0%	0%	GETTING CLOSER
	100%	100%	PREPARED TO PASS

06/16/2020	08/02/2020	10 hrs 5mins	100%	07/27/2020	Agent Name	Pre-licensing	New York Life and Health Pre-licensing
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Next Steps:

12/01 - XCEL Enrollment Flyers Distributed

12/01 - STC/XCEL Resource Center Live

12/07 - Enrollment Site and Discount Code Live



Candidate Support Contacts

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