



### PERSONAL INFORMATION

Username: \_\_\_\_\_ Password: \_\_\_\_\_  
 Back Office Login: my.Surge365.com  
 SBA Site: www.Surge365.com/\_\_\_\_\_  
 Sponsor: \_\_\_\_\_

### MY SURGE365 SUPPORT TEAM

Team Builder: \_\_\_\_\_  
 Regional Builder: \_\_\_\_\_  
 National Builder: \_\_\_\_\_  
 Marketing Director: \_\_\_\_\_

## STEP #1: GOALS

### UNDERSTAND YOUR FINANCIAL GOALS

In order for you to be able to help someone else get started, you need to get yourself started, which means you need to understand your financial goals.

1. How many hours a week will you promote your Surge365 business? \_\_\_\_\_
2. How much money will you make: Per week? \_\_\_\_\_ Per month? \_\_\_\_\_
3. What is your timeframe? \_\_\_\_\_
4. What is your ultimate lifestyle goal? \_\_\_\_\_

**FAST START**  
 \$150 Fast Start BONUS

Make 3 personal sales in your first 8 days.\*

**FAST START**  
 \$1000 Fast Start BONUS

Earn 14 personal points in your first 30 days.\*

*\*Signup Date Counts as Day 1*

## STEP #2: CREATE CONTACT LISTS

### WHO ARE YOUR BEST 10 CONTACTS?

Name	Profession	Phone	Notes

### Mobile Coach Setup

- Set my time preference
- Set my priority
- Texted my upline



### Download the Surge365 Mobile App

Available for download on iTunes | Android  
[Login information](#)

Username: \_\_\_\_\_

Password: \_\_\_\_\_

Note: This is the same information as above

## STEP #3: PRESENTATION

Below are the 3 types of presentations we recommend doing in Surge365. As you get started your Success Coach will help you decide which presentation works for each contact.

1. **One-On-One (1-1)** – This is the most effective. This is a meeting with only you, your contact, and your Success Coach. If they are local, you'll do the meeting in person. If they are not local, then you'll do an individual zoom with them and your Success Coach.
2. **Grand Opening Home Party (GO)** – This is a group style meeting where you invite several of your contacts to your home for a live presentation done by your Success Coach.
3. **Live Meeting (LM)** – This is a group style meeting where you would invite 2 or more contacts to attend a live presentation done by your Success Coach.

## STEP #4: REPEAT & TEACH THESE STEPS TO YOUR NEW SBA