



AMERILIFE®

# Prospecting System Training Manual



MARKETING



PROSPECTING



TRACKING





# Table of Contents

<b>Introduction</b> .....	<b>1</b>
<b>Getting Started</b> .....	<b>2</b>
<b>Prospecting</b> .....	<b>3</b>
Opportunity Home Page .....	3
Contacts – List and Detailed View .....	6
The Detailed Contact View .....	8
Creating a Prospecting or Call List .....	10
Global Tags .....	12
Merging Contacts .....	13
Sales Tracking, Activity Tracking .....	19
Reports .....	20
The Calendar .....	23
<b>Marketing Programs</b> .....	<b>25</b>
Webpage .....	25
E-Newsletter .....	26
Email Marketing .....	27
Running a Birthday Program .....	28
Sending a Thank You Card .....	32
Paper Newsletter .....	33
Printing on Demand .....	36

Notes



## Market Access Prospecting System

### Keeping You Connected to Prospects and Clients

This system takes the administrative work out of prospecting and marketing so you can spend more time with prospects and clients. Highly effective marketing campaigns are automated, customized, and specifically timed to cultivate these relationships on your behalf. [www.alagent.net](http://www.alagent.net)



#### Contact Management System

The Contact Manager is a key tool in managing your business. It is a central hub for all clients and prospects. You can search, filter or sort contacts easily based

on their contact data and custom tags. The system even keeps a correspondence log for each contact. The Contact Manager includes advanced features such as emailing, time since last contact, contact temperature and follow-up scheduling.



#### Email Marketing

The built-in email library and drip campaign tools make it easy to send emails to many contacts at once or to do an individual email

response in a snap. These emails are tracked in the system so you know if and when they were viewed and responses go directly to you.



#### Greeting Cards

It is as easy as a few clicks to send a greeting card to your clients to let them know you are thinking of them around the holidays, on their birthday or to simply say, "Thanks!"



#### Lead Generation

Direct mail lead generation mailers are available for generating senior market leads. Mailers

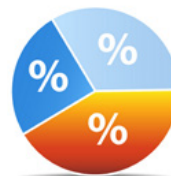
are professional looking, full color, and branded. The mailer is supported by a marketing system that keeps the initial interest alive through automated follow up communication until you can connect with the prospect.



#### Personal Site

Your webpage is focused on building credibility, enabling you to provide information to your clients and prospects immediately and inexpensively – making

you available 24/7.



#### Reporting

Reports on status and sales cycle are available to you 24/7. Keep track of dials, contacts and appointments with a quick "at a glance" status report.

These components work together to continually promote you to all of your contacts in a professional and personalized manner making YOU the Agent of choice.

**Welcome to AmeriLife Agent**  
You are Logging into **Dashboard**  
[Click Here](#) for the Standard Login Page

Username

Password

Remember me  
[Forgot your password?](#)

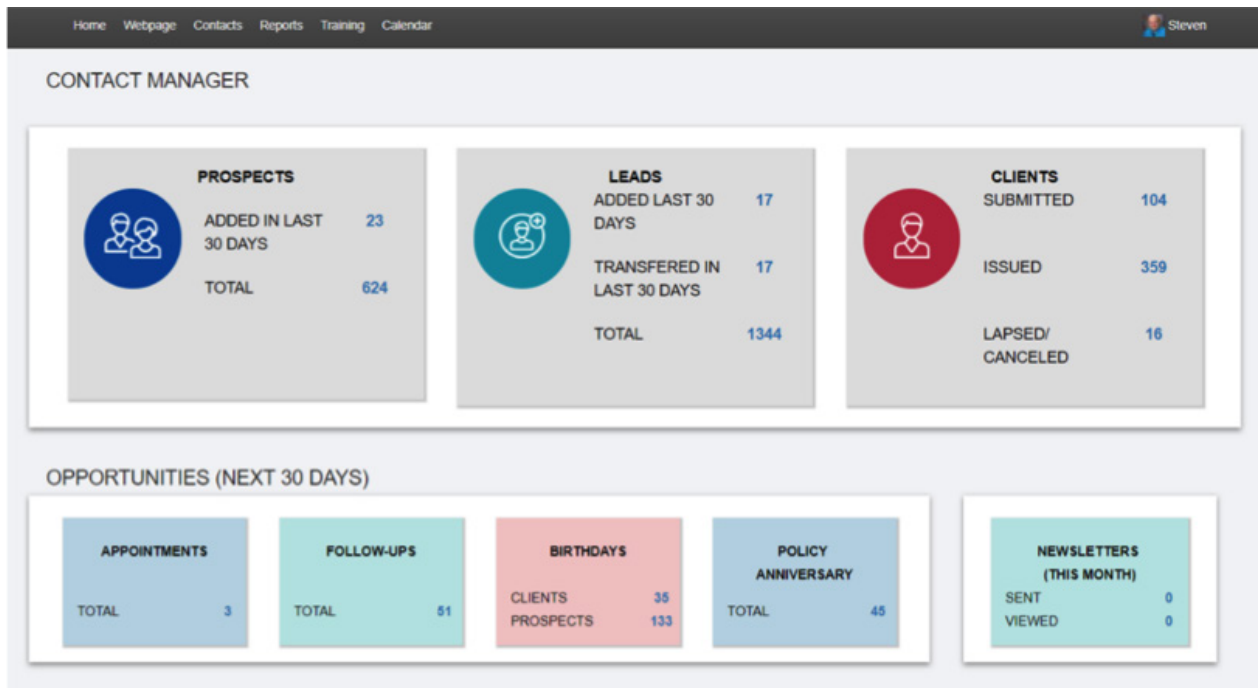
Login

**Website Address:** www.alagent.net

**Username:** FirstNameLastName *(no spaces)*

**Password:** Temp123 *(will be asked to reset password at login)*

## Opportunity Home Page



### Contact Manager Buttons

Three main buttons are Prospects, Leads and Clients. All data totals can be clicked on and the names will be displayed in your Contact Manager.

- 1. Prospects** – Prospects are all names in your system that have the following statuses (Prospect, Call Back, No Answer, Left Message, Declined, and Wrong Number). These names exclude the following sources: Client, Mail Lead and Internet Lead. There are two options that you can click on to pull up the relevant data.
  - a. Added in the Last 30 Days** – Names that have been added to your system in the last 30 days. This can happen in two ways. Your manager can transfer names directly to you OR you can upload or add names into your account.
  - b. Total** – All the names that fit the criteria list above for a prospect.



**2. Leads** – Leads are distinguished by specific sources. The following sources are included in the Leads numbers: Mail Lead and Internet Lead. If you have the following statuses and your Source is listed above you will be excluded from these totals (Client, Submitted, Lapsed, Declined, Cancellation, TOL, DNC and Deceased). You will have three options to narrow the leads down into groups based on their age in the system.

- a. Added in the Last 30 Days** – Leads added to system in the last 30 days. These would be the newest leads you have received.
- b. Transferred in Last 30 Days** – Any name transferred to an agent in the last 30 days – this does not take into account the length of time the name has been in the system.
- c. Total** – Total number of leads you have in your system with the sources listed above.



LEADS	
ADDED LAST 30 DAYS	17
TRANSFERRED IN LAST 30 DAYS	17
TOTAL	1344

**3. Clients** – Names here will be broken into three groups. The groups are all based on Statuses.

- a. Submitted** – Displays all names with a status of Submitted. Names updated from the new business uploads are automatically changed to this status and will be displayed in this bucket. You will stay in this bucket until your status changes.
- b. Issued** – Names with the status of Client – they will always stay in this section unless the status changes.
- c. Lapsed/Canceled** – Names that have their status changed to Lapsed or Cancellation.



CLIENTS	
SUBMITTED	104
ISSUED	359
LAPSED/ CANCELED	16



## Opportunity Buttons

There are 5 buttons in the opportunity section. They are Appointments, Follow-ups, Birthdays, Policy Anniversaries that happen within the next 30 days. The last box represents Newsletters sent this month.

- 1. Appointments** – All contacts that you have an appointment with in the next 30 days. To have names displayed here you must set an Appointment using the calendar within the contact. When calendar events are created within a contact, they are connected to that contact.
- 2. Follow-Ups** – All names that have follow-ups in the next 30 days. This will be calculated based on the follow-up date set inside the contact.
- 3. Birthdays** – Displays number of contacts with a birthday in the next 30 days; broken into two categories: Clients and Prospects. These are defined by status. Below are the statuses included or excluded from these results:

**Prospects: NOT THESE:**

*'Client', 'Submitted', 'Lapsed', 'Cancellation', 'Deceased', 'TOL – Take Off List', 'DNC – Do Not Call'*

**Clients: ANY OF THESE:**

*'Client', 'Submitted', 'Lapsed', 'Cancellation'*

- 4. Policy Anniversary** – This is based on the effective date in the policy section. This shows the number of clients that have a policy that will have an anniversary in the next 30 days.
- 5. Newsletters** – Two numbers are displayed in this section. The number of newsletters sent and the number of newsletters viewed in the current month. At times, the numbers here will be zero, or very low, until the newsletters are sent.

APPOINTMENTS	
TOTAL	3

FOLLOW-UPS	
TOTAL	51

BIRTHDAYS	
CLIENTS	35
PROSPECTS	133

POLICY ANNIVERSARY	
TOTAL	45

NEWSLETTERS (THIS MONTH)	
SENT	900
VIEWED	98

## Contacts - List and Detail View

This section will explain how to search, view and work your Prospects, Leads and Clients as one group vs. individual groups. Start on the main dashboard and select Contacts on the top tool bar.

Home Webpage Contacts Reports Calendar Training

When you click **contacts**, it will bring you to the main contact page called the List View. This view shows you information about all of your contacts, as well as several features that will be available for prospecting.

The screenshot displays the 'Contact Manager' interface. At the top, there is a navigation bar with 'Home', 'Webpage', 'Contacts', 'Reports', 'Calendar', and 'Training'. A search bar and a 'Mine' button are also present. Below the navigation, there is a section for 'Event Calendar' with a 'Manage Event Calendar Settings' link. The calendar shows dates from Tuesday, January 23 to Saturday, January 27. Below the calendar is a table of contacts with columns for 'First Last', 'Phone', 'Email', 'City Zip County', 'DOB', 'Last Contact', 'Next Contact', and 'Last Action: Note'. The first contact listed is Daniel Romano, with details including his address, phone number, and email. To the right of the calendar and table, there are several action buttons: 'Add New Contact', 'Import Contacts', 'Search Contacts', 'Search Clients', 'Search Submitted', and 'Search Recycle Leads'. Below these buttons are 'Actions for Selected' options: 'Purchase Service', 'Broadcast Email', and 'Email Lists / Drip Emails'.

The first section at the top is the “events calendar.” The calendar can be used to add appointments and follow ups which will allow you to manage your day and remember to follow-up when needed. For more details on the calendar see the calendar section.


This is a close-up screenshot of the 'Event Calendar' section. It shows a horizontal row of calendar days from Tuesday, January 23 to Saturday, January 27. Each day has a green plus sign icon, indicating that events can be added. The calendar is titled 'Event Calendar' and has a 'Manage Event Calendar Settings' link to its right.

Below the calendar are the data headers. Your contacts can be sorted in multiple ways. On the top, you will see the blue header links that when clicked on, will re-sort your header view. For example, if you wanted to sort all of your contacts by “last updated” you simply click the last updated link and the contact list view will now be organized by date of last updated contacts.

<a href="#">First Last</a>	<a href="#">Last Contact</a> ▼	<a href="#">Next Contact</a>	<a href="#">Last Action: Note</a>
<a href="#">Phone</a>	<a href="#">Last Updated</a>		
<a href="#">Email</a>	<a href="#">Date Added</a>		
<a href="#">City Zip County</a>	<a href="#">Status : Source</a>		
<a href="#">DOB</a>	<a href="#">Actions Taken</a>		

Next are your contacts. Each contact shows the primary information associated with a specific contact including name, address, county, phone number, email and birthday.

Each contact can also be organized by tags. Tags are small colored boxes with trigger words. Tags help to categorize your contacts with trigger words allowing you to search and find them easily. Some tags are automatically added based on behaviors like reading an email, or being updated with a submitted or issued policy. You can also create custom tags for more detailed organization.

<b>Daniel Romano</b> 3 Owen Ln Amherst, NH 03031 HILLSBOROUGH COUNTY Jimhill28@yahoo.com (856)577 0032 7/8/1944	Never 28 seconds ago 10 months ago	2 weeks	New: Lead imported from File by Jim Hill.
<span>lead</span> <span>life review</span> <span>door knock</span>			

<a href="#">Last Contact</a> ▼	<a href="#">Next</a>
<a href="#">Last Updated</a>	
<a href="#">Date Added</a>	
<a href="#">Status : Source</a>	
<a href="#">Actions Taken</a>	
Never	2 w
28 seconds ago	
10 months ago	

Each contact has 3 dates associated with them. These dates track updates and communications. The 3 dates tracked are last contact, last update and date added to the system. These dates are also sortable. You can actually hover over these dates to see the exact time the date and action occurred.

### Source

The source is the identifier for where the lead or prospect originated. For example a mail lead would always have source of Mail Lead even after becoming a client. (See status for how to identify Clients.)

### Status

The status lets you know the current sales cycle stage for that particular contact. Status is a critical piece of information to update to help save time and remember where you left off with the prospect or lead.

For additional information when calling from the list view you will also see the date that you are scheduled to contact the person as a next step and also on the right hand side the last action displays the last note added or last email communication with the contact. These pieces of information help you to be fully informed when reaching out to this contact.

For mail leads you will have a small folder icon on the bottom right hand section of the contact. This can be clicked on to view an image on the lead. Additional other files can be added to this contact record.



**When you click on the folder the below pops up.**

### Manage Files

**Recent Files**

No file chosen

000000230331702.pdf

# Prospecting

## The Detailed Contact View

Each contact can be edited by simply clicking anywhere on the contact's information. You will be taken to the contacts detail page that allows you to edit any of their information.

On the top below the mini calendar is the activity tracking ribbon – see the activity tracking guide for how to use this feature.

On the left-hand side is what you need to know to contact the person – so name, address, email address and phone number. Be sure to collect date of birth as we have several birthday programs.

On the right is your marketing data and how you get the system to work for you.

It starts with a blank section for additional contact details, for example, if the person is planning a trip to Alaska and you make a notation in the box, you won't forget to ask them how their trip was.

Moving down to temperature this allows you to color code your contacts on the list view. For example, if you have a hot lead choose the Blazing option and the lead will be colored red on the list view.

Status and follow up are also very important. You are able to change the status of the contact to accurately reflect where you are in the sales process.

Below that is the 'Follow Up' option. If you type '1 Week' it will automatically create a follow up 1 week from now and you can add it to your calendar. You will receive an email 1 day before the follow up is due. Now you'll never miss a follow up!

Below the main contact details is a space to collect the current Medicare carrier. This data is crucial for being able to follow up with this person when you are in a position to help with a specific product or rate change. This field is searchable so that these prospects are easy to find.

The screenshot displays a contact management interface. On the left, there are input fields for contact information: First Name (Daniel), Last Name (Romano), Company, Email (Jimhill28@yahoo.com), Phone ((856)577-0032), Mobile, Address (3 Owen Ln), City (Amherst), State (NH), Zip (03031), County (HILLSBOROUGH), DOB (7/8/1944), Spouse Name, Spouse DOB, and Medicare Carrier. On the right, there are dropdown menus for Last Contact (Never), Last Update (42 minutes ago), Owner (GeorgeWilson), Temperature (None), Source (Prospect List), and Status (No Answer). Below these is a 'Follow Up' field set to 2018-02-06 12:01:04, with an example of 'tomorrow 3:15 pm' and options to 'Add to Calendar' and 'Set Appointment'. At the bottom, there is a 'Tags' section with 'Add Tag...' and existing tags: 'lead', 'life review', and 'door knock'.

Next is the notes section where you can add any information that is specific to the contact. All added notes are time stamped so you have the exact date it was added. You will also see all email history here. The most recent note is also displayed on the list view. To add a new note type in the details and click on the Add Note button for it to be saved to the contact.

If you make any changes to the contact, remember to always click the 'Save' button at the top. If you want to Save this contact and move to the next contact, you can click the 'Save and go to next.'

### Take Action

## Using search contacts for really quick results:

In order to maximize your search efficiency while using AMS, we highly recommend using the "Search Contacts" section of the CRM.

Search Contacts enables you to search through a variety of different criteria. Use key data fields like birthdate month or address, you can manage all clients that meet that specific entry with one click of a button.

To get to search contacts, you need to go to the contact manager page, click on search contacts on the side bar, and then enter the desired criteria to best fit your search.

**This way you can really target your list!**

# Prospecting

## Creating a Prospecting or Call List

You can quickly search for the exact list of names you would like to prospect. The system allows you to narrow the list down to the exact names you need based on zip code, city, county or a number of other options.

### Searching for Your List

From the List View - Click on Search Contacts – located under the Take Action section on the right.

The screenshot shows the 'Contact Manager' interface. At the top left, it says '42 Results' and 'Event Calendar'. Below this is a calendar view for January 25th to 29th. To the right of the calendar is a 'Search' box with a 'Search' button, 'Search By Tag' dropdown, and 'Exclude By Tag' dropdown. Below the search area is a 'Take Action' section with buttons for 'Add New Contact', 'Import Contacts', 'Search Contacts' (highlighted in yellow), 'Search Clients', 'Search Submitted', and 'Search Recycle Leads'. Below the calendar is a table of contacts with columns: 'First Last', 'Temp', 'Phone', 'Email', 'City Zip County', 'DOB', 'Last Contact', 'Last Updated', 'Date Added', 'Status : Source', 'Actions Taken', 'Next Contact', and 'Last Action: Note'. The first contact listed is 'Jim Hill' with address '5 Old York Rd', last contact '5 hours ago yesterday', next contact 'next week', and last action 'Email Viewed: User viewed this email'.

Put in the criteria you want to search for. In this example we will search on the City field.

First Name	<input type="text"/>
Last Name	<input type="text"/>
Company	<input type="text"/>
Address	<input type="text"/>
City	<input type="text" value="Tacoma"/>
State	<input type="text"/>
Zip	<input type="text"/>
Country	<input type="text"/>

Scroll down and click on the Search button.



You will now have all names in your specified search displayed on your List View. You will see the search results at the top of the list.

## Contact Manager

17 Results For  City: Tacoma



Event Calendar

[Manage Event Calendar](#)

Thursday, January 25	Friday, January 26	Saturday, January 27	Sunday, January 28	Monday, January 29
25	26	27	28	29

<input type="checkbox"/> First Last	Last Contact	Next Contact	Last Action: Note
<b>Temp</b> Phone Email City Zip County DOB Owner	Last Updated Date Added Status : Source Actions Taken		
<b>Kathryn Hiatt</b> 4905 53rd St E Tacoma, WA 2538 (253)922-2529	Never Never 2 days ago		New: Lead imported from File by Jim Hill.

# Prospecting

## Global Tags

Adding or Deleting a Tag for Multiple Records at One Time

With this new feature you are able to add and remove Tags for multiple people with just a few clicks. To use this new feature follow the 6 simple steps below.

- Step 1** – Click on the “Contacts” tab.
- Step 2** – Select the names you want to add or remove Tags from by clicking the check box in front of the name or by selecting the whole list by clicking the check box above the word “Temp”.
- Step 3** – Once you have the names selected, scroll down and on the right hand side, under Actions for Selected, click on Manage Tags.
- Step 4** – Here you can Add or Remove any Tags assigned to your names. You just need to click on the Add or Remove line and select the tag you want. You can also key in a new Tag if the one you want to add is not listed. Here I want to remove the Tag “updated” from my first two records so I keyed in “update”.
- Step 5** – Since I want to remove the Tag “updated”, I will click Remove Tag. Then a pop up appears where you confirm you want to remove “updated” from all selected contacts and click OK.
- Step 6** – You will be returned to your list and can see that the “updated” Tag has been removed.

### Contact Manager

Add these tags to all selected contacts:

Remove these tags from all selected contacts:

golf x

Add/Remove These Tags

Cancel

### Tag Stats

Tag	Contacts With Tag
broadcast email	2
policy review	2
emailnnenrd	2



## Merging Contacts

### Merging Contacts in AMS

Over time duplicate names may have been created in your system. You can now Merge them together into one contact.

- ▶ You can merge as many names together as you would like.
- ▶ Once names have been merged you can NOT undo them. Please make sure you are merging the correct names before you hit the merge button.
- ▶ This feature will merge all notes, policies, files, tags, and data associated with the names.

### Search for the Contacts to Merge

From the contact manager enter the search criteria you want to use to find your contacts (i.e., last name). Click Search.

The screenshot shows the 'Contact Manager' interface with a search bar containing 'hill' and a 'Search' button. Below the search bar is an event calendar for 'Test Agent' showing dates from Monday, June 16 to Friday, June 20. The main content area displays a list of contacts with columns for 'First Last', 'Temp', 'Phone', 'Email', 'City Zip', 'County', 'Last Contact', 'Last Updated', 'Date Added', 'Status : Actions Taken', 'Next Contact', and 'Last Action: Note'. Two contacts are visible: George Wilson and Jessica Beacham. The right sidebar contains 'Take Action' buttons like 'Add New Contact', 'Invite Contacts', 'Search Contacts', 'Search "Mail Leads"', and 'Search Submitted', along with 'Actions for Selected' buttons like 'Purchase Service'.

First Last	Last Contact	Next Contact	Last Action: Note
Temp Phone Email City Zip County	Last Updated Date Added Status : Actions Taken		
<b>George Wilson</b> 905 Little Perch Lk S Gwinn, MI (906)346-3357 6/17/2013 import test inbox infree golf	2 weeks ago last month 11 months ago Client : Email Sent(5)	PAST: last month	Email Sent: The system sent this email: "ASB May Newsletter"
<b>Jessica Beacham</b> 254 York Road Turnersville, NJ 08012	7 months ago 4 months ago 9 months ago		Contract: Update lead from T-65 to Submitted CarrierName: Care

## Search Results

All contacts fitting your search material will be displayed.

<input type="checkbox"/>	First Last Temp Phone Email City Zip County	Last Contact Last Updated Date Added Status : Actions Taken	Next Contact	Last Action: Note
<input type="checkbox"/>	<b>James Hill</b> 12 Market Street Mt Laurel, NJ 08054 (856)555-1234 10/1/1949 email football	22 hours ago 21 hours ago 22 hours ago Default :	2 weeks	New: Vacation in 2 weeks
<input checked="" type="checkbox"/>	<b>J Hill</b> 123 Market Street Mount Laurel, NJ 08054 10/1/1949 call life follow up	22 hours ago 21 hours ago 22 hours ago Client :		New: Needs additional coverage
<input type="checkbox"/>	<b>Jim Hill</b> 123 Market Street Mt Laurel, NJ 08054 (856)555-1234 10/1/1949 call football golf fq call asb happy birthday	22 hours ago 21 hours ago 22 hours ago Lead : Call		Call: Set appointment for Wednesday at 7:30 pm

**Take Action**

- Add New Contact
- Invite Contacts
- Search Contacts
- Search "Mail Leads"
- Search Submitted

**Actions for Selected**

- Purchase Service
- Broadcast Email
- Email Lists / Drip Emails
- Transfer Contacts
- Manage Tags

### Selecting Contacts to Merge

Select the contacts you want to merge by clicking the box next to the contact's name. Click Merge Contacts.

<input checked="" type="checkbox"/>	City Zip County	Status : Actions Taken		
<input checked="" type="checkbox"/>	<b>James Hill</b> 12 Market Street Mt Laurel, NJ 08054 (856)555-1234 10/1/1949 email football	22 hours ago 21 hours ago 22 hours ago Default :	2 weeks	New: Vacation in 2 weeks
<input checked="" type="checkbox"/>	<b>J Hill</b> 123 Market Street Mount Laurel, NJ 08054 10/1/1949 call life follow up	22 hours ago 21 hours ago 22 hours ago Client :		New: Needs additional coverage
<input checked="" type="checkbox"/>	<b>Jim Hill</b> 123 Market Street Mt Laurel, NJ 08054 (856)555-1234 10/1/1949 call football golf fq call asb happy birthday	22 hours ago 21 hours ago 22 hours ago Lead : Call		Call: Set appointment for Wednesday at 7:30 pm

**Actions for Selected**

- Search Contacts
- Search "Mail Leads"
- Search Submitted
- Purchase Service
- Broadcast Email
- Email Lists / Drip Emails
- Download Contacts
- Download Notes
- Transfer Contacts
- Merge Contacts**

## Display of Names to Merge

The data from each Contact will be displayed alongside the other contact records. The contact highlighted in grey is the name the system picks as the primary name that contains the most content or most activity.

Select the lead you wish to keep and the fields with values. Notes, Files etc. will be merged with the selected lead.

James Hill (2310150)   
  J Hill (2310364)   
  Jim Hill (2310147)

Ownerid	Test Agent	Test Agent	Test Agent
Lead Type	<input type="text"/>	New Business	<input type="text"/>
First Name	James	J	Jim
Last Name	Hill	Hill	Hill
Address	12 Market Street	123 Market Street	123 Market Street
City	Mt Laurel	Mount Laurel	Mt Laurel
State	NJ	NJ	NJ
Zip	08054	08054	08054
Phone	8565551234	<input type="text"/>	8565551234
Cell	8565552345	8565550001	8565552345
Followup Date	7/7/2014 11:43 AM	<input type="text"/>	<input type="text"/>
Priority	None	Warm	Hot
Role	Lead	Lead	Lead
Custom Status	Default	Client	Lead

Select the lead you wish to keep and the fields with values. Notes, Files etc. will be merged with the selected lead.

James Hill (2310150)   
  J Hill (2310364)   
  Jim Hill (2310147)

Ownerid	Test Agent	Test Agent	Test Agent
Lead Type	<input type="text"/>	New Business	<input type="text"/>
First Name	James	J	Jim
Last Name	Hill	Hill	Hill
Address	12 Market Street	123 Market Street	123 Market Street
City	Mt Laurel	Mount Laurel	Mt Laurel
State	NJ	NJ	NJ
Zip	08054	08054	08054
Phone	8565551234	<input type="text"/>	8565551234
Cell	8565552345	8565550001	8565552345
Followup Date	7/7/2014 11:43 AM	<input type="text"/>	<input type="text"/>
Priority	None	Warm	Hot
Role	Lead	Lead	Lead
Custom Status	Default	Client	Lead

## Highlighted Data

The information that is highlighted is the information that will be kept for that field and merged into the consolidated contact record. The system will automatically pick up data from another contact if the field is empty in the primary contact.

## Selecting Data to Keep

To select a different field, click on that field and it will become highlighted.

\*\*The highlighted fields are what will be kept after the merge.\*\*

Select the lead you wish to keep and the fields with values. Notes, Files etc. will be merged with the selected lead.

James Hill (2310150)     J Hill (2310364)     Jim Hill (2310147)

Ownerid	Test Agent	Test Agent	Test Agent
Lead Type	<input type="text"/>	New Business	<input type="text"/>
First Name	James	J	Jim
Last Name	Hill	Hill	Hill
Address	12 Market Street	123 Market Street	123 Market Street
City	Mt Laurel	Mount Laurel	Mt Laurel
State	NJ	NJ	NJ
Zip	08054	08054	08054
Phone	8565551234		8565551234
Cell	8565552345	8565550001	8565552345
Followup Date	7/7/2014 11:43 AM		
Priority	None	Warm	Hot
Role	Lead	Lead	Lead
Custom Status	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Merging Contacts

Click Merge Contacts when you have completed selecting the fields you want in the merged file.

Help

Hospitalized Spouse	N		N
Cancer	Y		N
Cancer Spouse	N		N
Kidney Issues	Y		N
Kidney Issues Spouse	N		N
Surgeries In Next Year	Y		N
Surgeries In Next Year Spouse	N		N
Emphysema Copd Oxygeno	Y		N
Emphysema Copd Oxygeno Spouse	N		N
Tobacco	N		N
Tobacco Spouse			N

Merge Contacts

## Confirming the Merge

You will receive the above message to confirm the merge.

Once you click OK **THE MERGE CANNOT BE UNDONE.**

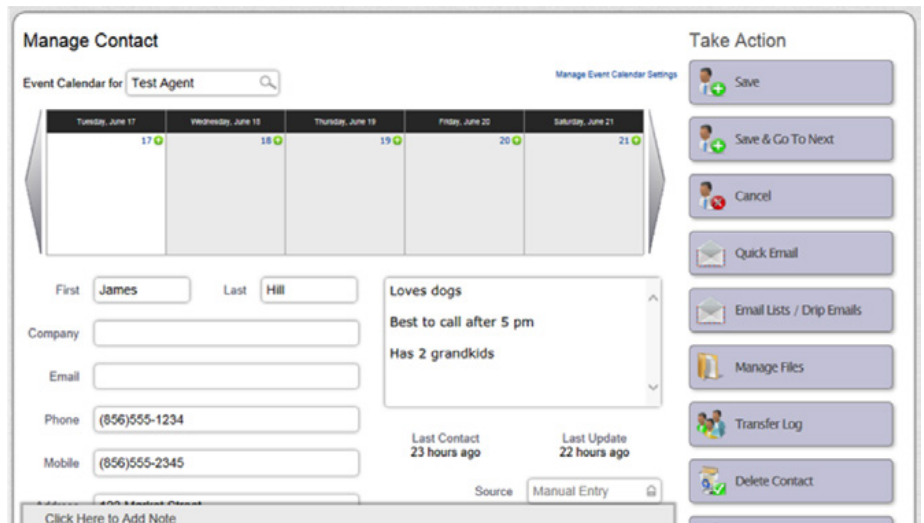
Message from webpage

Are you sure you want to merge all 3 contacts into Jim Hill (2310147)?  
This action cannot be undone.

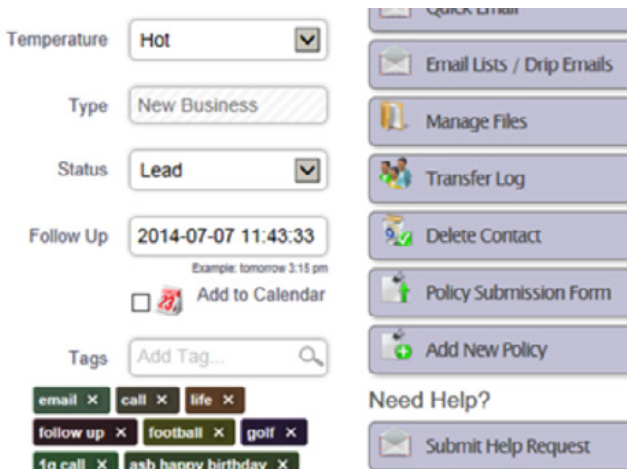
OK Cancel

## Final Contact Merge

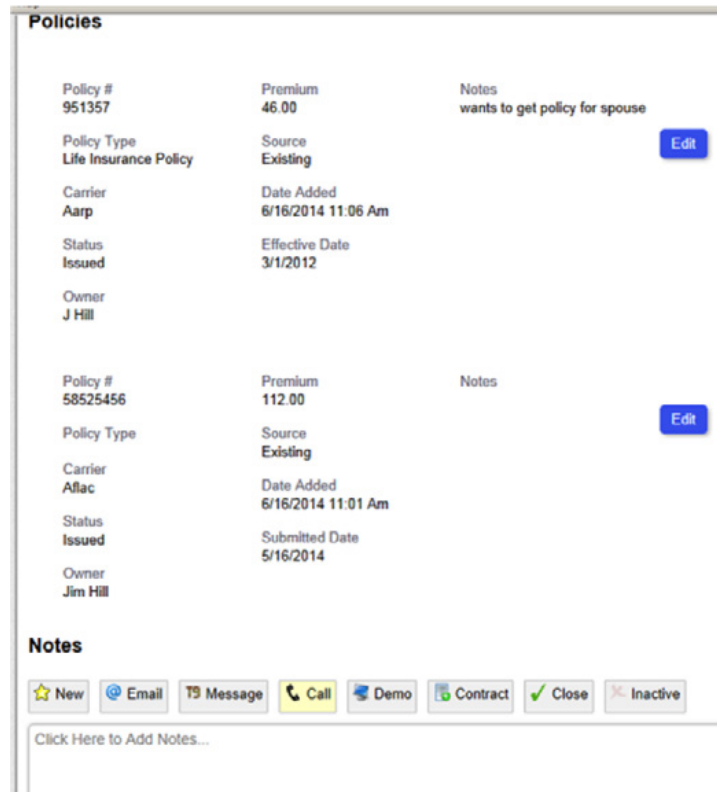
After the merge is complete the system will return to the new (merged) contact record. *\*Note the Additional comments at the top of the record have been combined.*



The tags from all 3 records have been combined as well.



Policies have been moved to the new contact.



In the bottom notes there is a section that displays the data from the merged contacts that was not kept. This is the only place that information from the merged contacts will appear.

## Notes

☆ New Email 19 Message Call Demo Contract

Click Here to Add Notes...

Help

☆ New 0 seconds ago

Merged Lead(s) on 06-17-2014  
Merged by testagent2 (1078)  
Data from Removed Leads:

Lead #2310150  
id = 2310150  
address = 12 Market Street  
city = Mt Laurel  
date\_added = 2014-06-16 11:00:04  
last\_contact = 2014-06-16 11:20:37  
last\_modified = 2014-06-16 11:43:40  
status = 1  
status\_list = "1"  
tag\_list = "30'619"  
priority = None  
custom\_status = 0  
admin\_notes = Loves dogs  
x\_insurance\_carrier = American Pioneer  
x\_spouse = Tina  
x\_premium = 200  
last\_action = New: vacation in 2 weeks  
x\_plan\_type = MS  
x\_plan\_type\_spouse = MS  
x\_insurance\_carrier\_spouse = American Pioneer

Take Action

- Save
- Save & Go To Next
- Cancel
- Quick Email
- Email Lists / Drip
- Manage Files
- Transfer Log
- Delete Contact
- Policy Submission
- Add New Policy

Need Help?

- Submit Help Req

This data can be deleted by clicking on the X to the right of the notes. If you choose to delete these notes **they cannot be retrieved again.**

☆ New 15 minutes ago

Merged Lead(s) on 06-17-2014  
Merged by testagent2 (1078)  
Data from Removed Leads:

Lead #2310150  
id = 2310150  
address = 12 Market Street

Take Action

- Save
- Cancel
- Quick E

Delete

The bottom notes from the other 2 records are now all listed in the merged contact.

Help

Lead #2310364  
id = 2310364  
first\_name = J  
cell = 8565550001  
date\_added = 2014-06-16 11:06:21  
last\_contact = 2014-06-16 11:06:21  
followup\_date = 0000-00-00 00:00:00  
last\_modified = 2014-06-16 11:44:04  
status = 1  
status\_list = "1"  
tag\_list = "47'103'260"  
priority = Warm  
custom\_status = 11  
admin\_notes = Best to call after 5 pm  
last\_action = New: Needs additional coverage

☆ New 22 hours ago  
Vacation in 2 weeks

☆ New 22 hours ago  
Needs additional coverage

Call 23 hours ago  
Set appointment for Wednesday at 7:30 pm

Take Action

- Save
- Save & Go To Next
- Cancel
- Quick Email
- Email Lists / Drip Emails
- Manage Files
- Transfer Log
- Delete Contact
- Policy Submission Form
- Add New Policy

Need Help?

- Submit Help Request

Now, when a search is done using the same last name criteria for the search, only one record is found and displayed.

Dashboard Attract Communicate Manage Success

### Contact Manager

1 Results For Keywords: Hill

Event Calendar for Test Agent

Timeline	Tuesday, June 17	Wednesday, June 18	Thursday, June 19	Friday, June 20	Saturday, June 21
	17	18	19	20	21

Search: Hill

Search by Tag

Exclude by Tag

Take Action

- Add New Contact
- Write Contacts
- Search Contacts
- Search "Mail Leads"
- Search Submitted

Actions for Selected

- Purchase Service

First Last	Last Contact	Next Contact	Last Action: Note
Temp Phone Email City Zip County	Last Updated Date Added Status : Actions Taken		
<b>James Hill</b> 123 Market Street Mount Laurel, NJ 08054 056555-1234 10/1/1949	23 hours ago 9 seconds ago 23 hours ago	2 weeks	Call: Set appointment for Wednesday at 7:30 pm

Lead: Call

email call sms follow up facebook twitter skype call add happy birthday

## Sales & Activity Tracking

You can track your call activity by using the Activity Tracking section of the contact record. When making calls click on the appropriate check boxes to track what you accomplished with the call. The total activity based on date range is also shown when using the Activity Tracking report.

### Activity Tracking

- ▶ Check a box for each appropriate activity and save the record.
- ▶ Reports are created by the date the check box was added and the record was saved.

Activity Tracking								
Lead : 12/24/2017 to 1/24/2018								
Owner ID	First Name	Last Name	Attempts	Contact	New Info	Appt Set	Appt Held	App Taken
5	Andrew	Lovelace	0	1	1	0	0	0
8	Philip	Russell	1	1	0	1	0	0
30	Margaret	Audet	0	0	0	1	1	0
32	Sam	Smith	2	2	1	1	0	0
37	George	Wilson	3	3	0	0	0	0
304	Jim	Hill	1	1	1	1	0	0
			2	2	1	1	0	1

### Activity Tracking –DEFINITIONS

#### Attempt

Contact attempted and made or not made

#### Contact

Actually spoke to a person in the household

#### New Info

Any information that you collect on the contact

#### Appointment Set

Appointment Set

#### Appointment Held

Appointment Held

### Activity Tracking – LAYOUT

- ▶ In the Contact Record are the activity tracking check boxes.

Attempts   
  Contact   
  New Info   
  Appt Set   
  Appt Held   
  App Taken

First     Last

Last Contact 9 hours ago    Last Update Never

## Reports

The reporting section allows you to pull a variety of reports to check your activity, appointments, contact temperature, lead assignments, contact statuses and leads added. Managers and agents can utilize all reports. Agents will see their data displayed and managers will see all their agent's data.

### Activity Tracking Report

**The intent of this report is to display:**

All lead based activity. An agent would view their activity regarding call attempts, contacts, new info, appointments set, appointments held and applications taken. A manager would view their own activity plus all activity of managers and agents in their downline.

**You would want to use this report to:**

Monitor your own activity and the activity of managers and agents in your downline. The report can be viewed with different date ranges; week, day, month, quarter and year.

Activity Tracking								
Lead : 12/23/2017 to 1/23/2018								
Owner ID	First Name	Last Name	Attempts	Contact	New Info	Appt Set	Appt Held	App Taken
142	Demo	Wilson	3	2	2	0	0	0
143	Sam	Smith	25	21	12	9	3	2

### Calendar Event Creation Report

**The intent of this report is to display:**

An overview of all calendar events created within AMS. An agent will see their own appointments and a manager will see their appointments and of any agent or manager in their downline.

**You would want to use this report to:**

Identify appointment activity and follow up. The reports can be created for a specific timeframe, a day, month, quarter, half year, or year.

Calendar Event Creation Report								
Date: 1/23/2017 to 1/23/2018								
Owner Id: Sam Smith, George Wilson								
Owner	Created By	Beginning Date	Time	End Date	Time	Title	Location	Description
George Wilson	George Wilson	3/17/2017	12:00 AM	3/17/2017	12:00 AM	Follow Up for margaret audet		Follow Up Event Automatically generated via Contact Manager.
George Wilson	George Wilson	3/24/2017	3:00 PM	3/24/2017	3:00 PM	Follow Up for Keene Smith		Follow Up Event Automatically generated via Contact Manager.
George Wilson	George Wilson	4/4/2017	1:56 PM	4/4/2017	1:56 PM	Follow Up for Mark Martin		Follow Up Event Automatically generated via Contact Manager.
George Wilson	George Wilson	4/6/2017	1:56 PM	4/6/2017	1:56 PM	Follow Up for Judith Dyke		Follow Up Event Automatically generated via Contact Manager.
George Wilson	George Wilson	9/6/2017	3:18 PM	9/6/2017	3:18 PM	Follow Up for Cheryl Wozmak		Follow Up Event Automatically generated via Contact Manager.
Sam Smith	Sam Smith	11/30/2017	9:00 AM	11/30/2017	10:00 AM	Edith Doolittle 8569814803	26 Forsythia Dr, Belton, MO 64012	(856) 981-4803
Sam Smith	Sam Smith	12/1/2017	4:00 PM	12/1/2017	5:00 PM	Judith Smith 8569814805	505 Mill Ct, Belton, MO 64012	(856) 981-4805
Sam Smith	Sam Smith	12/8/2017	2:00 PM	12/8/2017	3:00 PM	Larry Hall 2534478274	23804 67th St E, Buckley, WA 7460	(253) 447-8274
Sam Smith	Sam Smith	12/12/2017	3:11 PM	12/12/2017	3:11 PM	Follow Up for Judith Smith		Follow Up Event Automatically generated via Contact Manager.



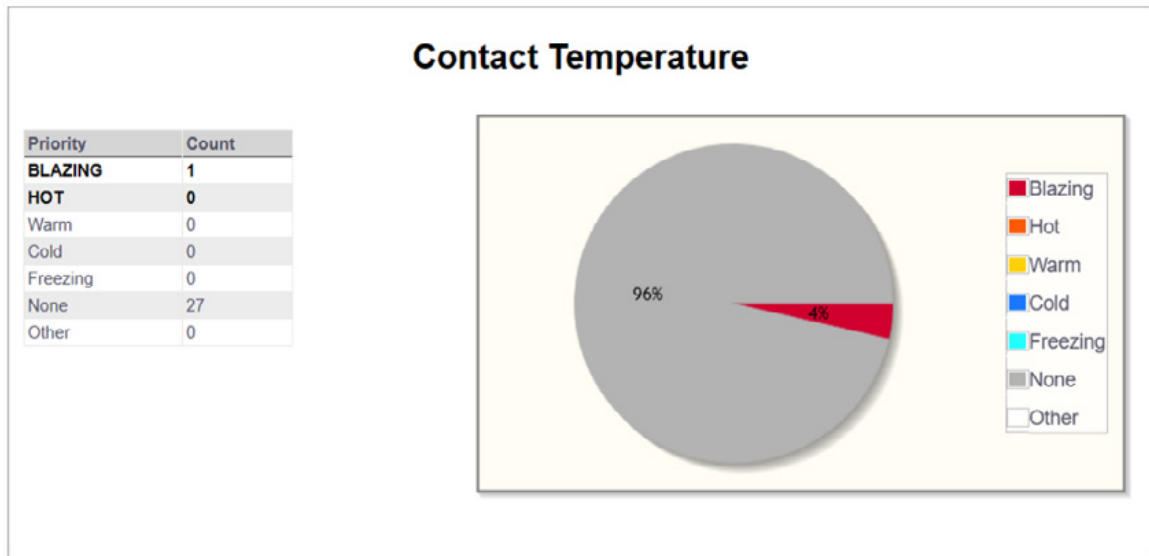
## Contact Temperature Report

### The intent of this report is to display:

The interest level of your contacts. For this report to have information you must use the temperature feature in the contact details. This report provides an “at a glance” guide to contacts. An agent will see the categorization of their own contacts and a manager will see their own contacts and the contacts of everyone in their downline.

### You would want to use this report to:

Get a high-level view of the temperature or engagement level of all contacts on you database.



## Lead Assignments Report

### The intent of this report is to display:

The source and distribution of leads by managers to agents.

### You would want to use this report to:

Monitor which agent received leads, how many by source and when assignment occurred.

Date range, who got them, totals by source, owner ID. Based on initial (permanent source)

**Leads Assignments**

Owner ID	First Name	Last Name	Manual Entry	Other	contact	General List	Import	Mlead - mail lead	Prospect List	Profile	RME Seminar
1	Joseph	Frazier	2	0	0	0	0	0	0	0	0
8	Philip	Russell	3	0	0	0	0	0	0	0	0
30	Margaret	Audet	1	1	1	0	0	0	0	0	0
32	Sam	Smith	0	0	0	6	3	9	10	0	0
37	George	Wilson	1	37	0	109	4	0	0	1	0
304	Jim	Hill	2	0	0	0	0	0	0	1	1
310	Jessica	Paviluk	1	0	0	0	0	0	0	0	0

## Contact Status Report (Lead Disposition)

### The intent of this report is to display:

The current status or disposition of all contacts (leads and prospects) after making a prospecting attempt.

The status is critical to update to determine the value of marketing programs and the phone or contact success you or your agent may be having. The change to status is also critical for the recycle functionality and to ensure leads are worked. An agent would see their own leads and a manager would see their own leads and the leads of everyone in their downline.

### You would want to use this report to:

Determine the status of contacts by agent based on contacts made, appointments set, call backs and client conversions.

Contact Status Report									
Owner ID	First Name	Last Name	Prospect	Left Message	Appointment Set	Submitted	Call Back	No Answer	Client
1	Joseph	Frazier	2	0	0	0	0	0	0
8	Philip	Russell	3	0	0	0	0	0	0
32	Sam	Smith	9	1	12	1	1	0	0
37	George	Wilson	46	1	1	1	0	2	1
304	Jim	Hill	52	0	1	0	0	0	0
310	Jessica	Paviluk	1	0	0	0	0	0	0

## Leads Added

### The intent of this report is to display:

Leads added into your system (your meaning the user). An agent would see their own information while a manager would see their own information plus the information for any managers and agents in their downline.

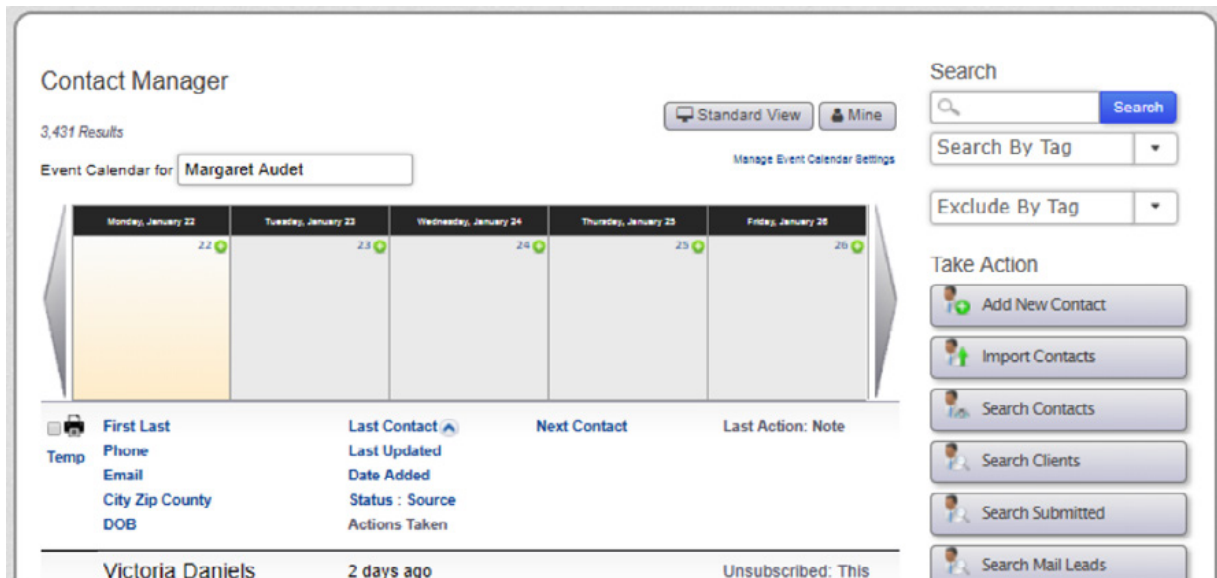
### You would want to use this report to:

Identify the number of leads by current owner by status. This report is a cross-tab for owner ID, Name, Original source by current source. This would show you leads that came in from a mail program that are now a client.

Leads Added						
Owner ID	First Name	Last Name	Original Source	Prospect List	Client	Internet Lead
32	Sam	Smith	General List	0	0	0
32	Sam	Smith	Import	0	0	0
32	Sam	Smith	Mlead - mail lead	0	0	0
32	Sam	Smith	Prospect List	0	0	0

## The Calendar

The system includes a calendar so that you can plan appointments and follow ups while you are on the phone. The calendar syncs with a google calendar. For syncing instructions see the training guide in the training library. The calendar on the list and contact view is a mini-calendar view. The mini calendar is located on top of the list view. You can see 5 days at a time. You can click on the arrows before or after the calendar to change the dates displayed.

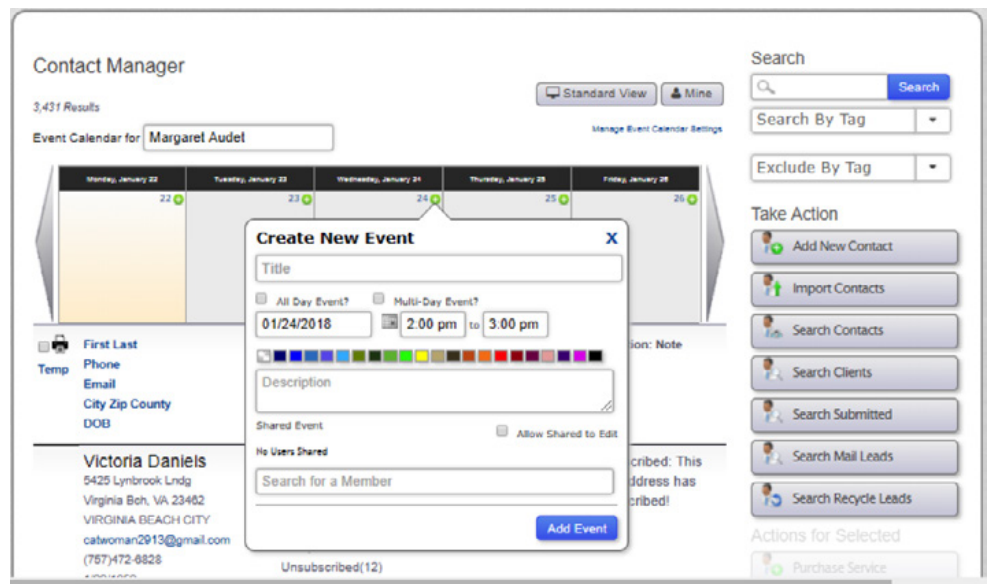


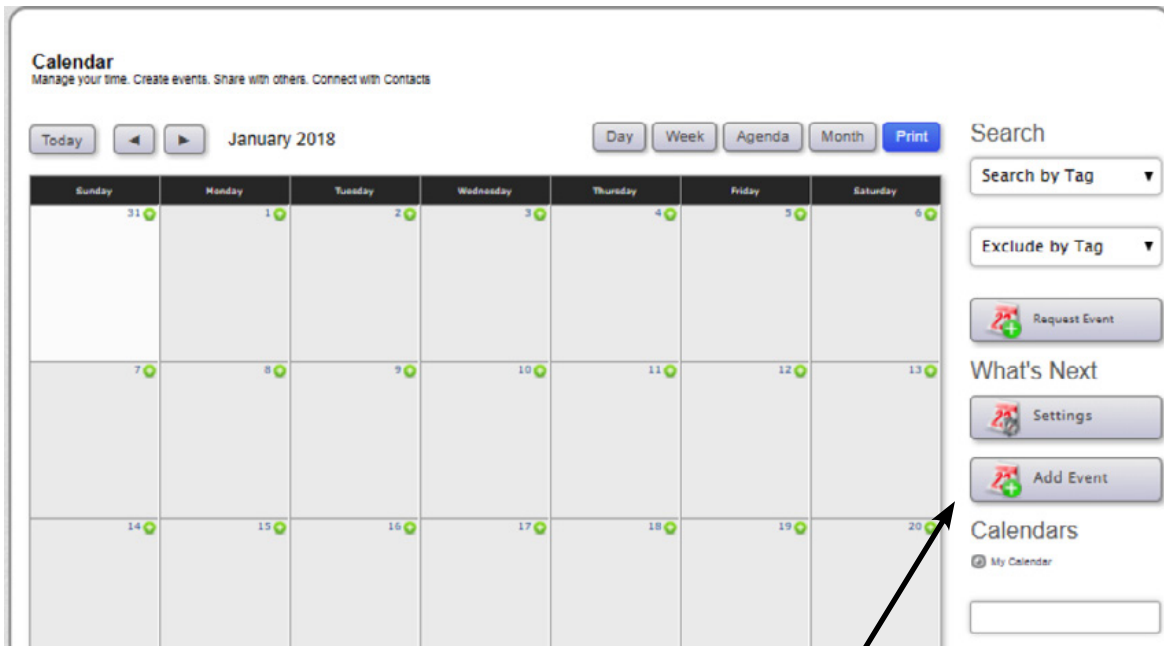
To add an event to the calendar open a contact and decide on the date of the meeting and click on the green plus sign. This opens the “Create a New Event” box. Fill out the details and click Add Event. The event will now be on your calendar. The contact’s address is added to the event. There must be a contact record for the event to connect to your contact.

### Calendar Tab

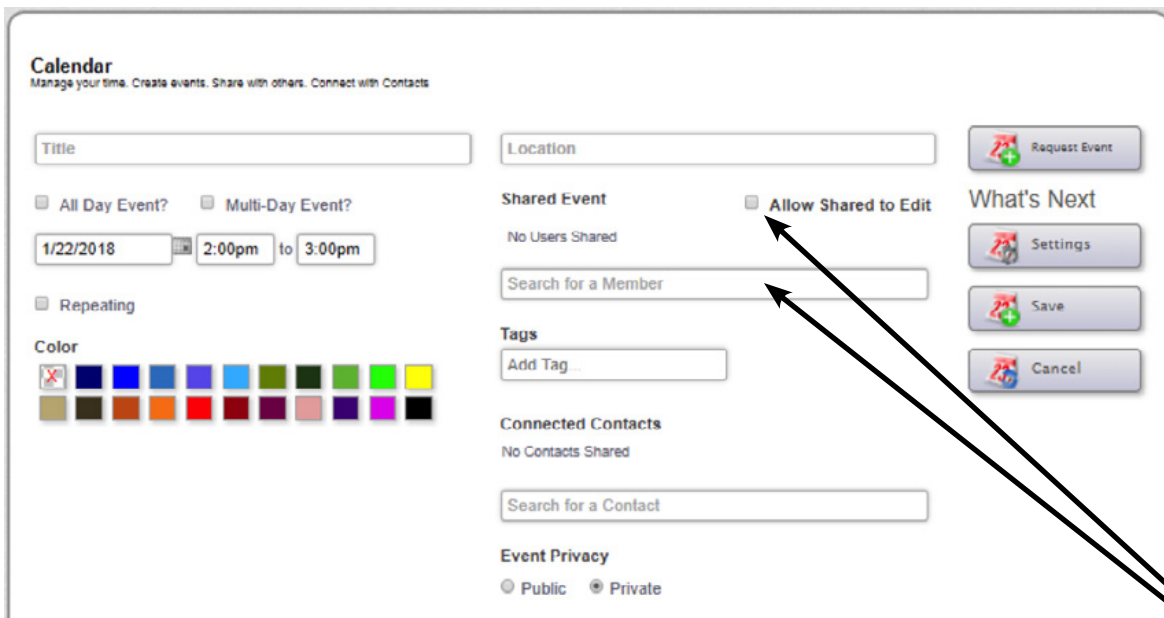
Another way to add an event to the calendar is to click on the Calendar tab and then click Add Event.

You have multiple views of the calendar. You can select Day, Week, Month or Agenda view. The Agenda view is currently displayed. Here all your appointments are listed out by date and time.





To add an event from the calendar view Click on Add Event. Complete in the Event Name and Location. You can also type any note about the appointment.



You can also share this appointment with another agent in your office by inputting their name here. If you want to allow them the ability to edit the event, check the box Allow Shared to Edit. By typing in the person you are meeting with it will connect their contact record to this appointment.

## Marketing Programs

### Keeping You in Front of Prospects and Clients

There are a variety of marketing programs that allow you to easily market to your prospects and clients. You can send compliant approved emails with just 4 clicks on topics such as policy reviews, agent introductions, birthday greetings and a monthly newsletter. The newsletter program also provides a monthly newsletter in email and paper versions. The greeting card library offers a variety of cards that can be personalized and sent via First Class mail.

All of these programs are designed to help... **Increase Sales Opportunities**

## Webpage

Having a webpage builds credibility. Most potential clients will research the agent coming to their home so it is very important that you have a presence on the web.

The webpage will introduce yourself to prospects, while providing your background and interests.

The page also provides relevant and educational information and allows for visitor to sign up for more information. When a visitor signs up for more information it will collect new lead and add it directly in your AMS System.

Most importantly the webpage makes you accessible 24/7.

The screenshot displays the AmeriLife website interface. At the top, the AmeriLife logo is prominently featured. Below the logo, the page is divided into sections. On the left, there is a profile for 'SAM SMITH' with a photo, contact information (jim@marketaccessdirect.com, 2 Eves Drive, Suite 220, Marlton, New Jersey 08053), and a bio. The bio states: 'Agent has been in the insurance industry for over twenty years and specializes in providing retirement planning solutions to his clients. He is focused on providing information on Medicare, Life Insurance and Retirement Planning. Agent and his wife have been residents of Anytown for over ten years.' Underneath, there is an 'Interests' section: 'I enjoy golfing, football and spending time with my wife and 2 kids.' To the right of the profile is a 'Contact Sam Today' form with fields for Name, Email, Phone, and a Question/Comment section. Below the form is a 'Submit' button. At the bottom of the page, there is an 'INFORMATION CENTER' section with two featured items: 'General Medicare' and '9-Point Guide to Final Expense'.

## E-Newsletter

The e-newsletter goes to everyone in your database that has an email address. There is no additional charge for an e-newsletter to go out, nor is there a volume limit (minimum or maximum). In other words the more emails you collect, the more e-newsletters you send. The newsletter is a combination of articles about Medicare, other insurance products you offer, health & wellness information, a recipe and a Sudoku puzzle. This newsletter has your phone number, address AND picture.

**It is a great way to be in each house every month without physically being in the house every month.**

Call after people receive and open your newsletter and ask if they liked the product article or the recipe. Suggest getting together to see if any of their needs changed. Also remember to ask if they know of anyone else that might like your newsletter. This is a nice way to get appointments for additional products in your client households, secure the client relationship and get referrals.

There is also a printed paper newsletter, priced at \$1.00 that can be sent to all contacts where you do not yet have the email address. This price changes periodically so check in the Purchase Service section of AMS. A best practice has become to use the paper newsletter as a sample of why you want someone's email address. A few days after sending a paper newsletter to an address, call to follow up and ask the person if they got the newsletter...did they like the recipe...etc. Then explain that you would like to keep sending it but you need their email to do so. Essentially, you are investing \$1.00 to have a sample of the newsletter sent to a person so they know your request for their email address is justified. Paper newsletters can be sent monthly, quarterly, annually – it's up to you how often you place an order.

When asking for email address simply say, *"I have a monthly newsletter that I send monthly via email. I'd really like to include you on that list if I could have your email for this newsletter only. I send it monthly and I really think you would enjoy it."*

Stating clearly that you only send the newsletter monthly and it is informational and not a hard selling piece is helpful in making people feel comfortable providing you with this piece of information.

**Use the e-Newsletter to generate sales and get referrals.**

**WELCOME to the MARCH 2017 ISSUE!**

*Compliments of*

**JIM HILL**

enjoy St. Patrick's Day fun, cheer at "March Madness" games and mark National Nutrition Month by watching what you eat. This issue includes important Medicare news, some tax preparation tips, and, of course, a tasty recipe. If I can help you with insurance needs, **contact me today!**

To reach me, please call: 800-677-0032

Email me at [Jim@marketaccessdirect.com](mailto:Jim@marketaccessdirect.com)

or visit my web page [www.jimhillmarketaccessdirectdemo.com](http://www.jimhillmarketaccessdirectdemo.com)

**FIXING A COMMON MISUNDERSTANDING ABOUT MEDICARE AND THERAPY**

For a while Medicare has acknowledged a common "misunderstanding" about exactly when Medicare beneficiaries are eligible for physical or occupational therapy or other skilled care. Many had thought that to be eligible, a person's health needed to be improving.

The fact is, no such stipulation exists. Improvement is not required as long as seniors are otherwise qualified for coverage. Medicare has tried before to "get the word out" about therapy, but without success. Under a settlement approved in Vermont,

Medicare will develop a new website explaining how therapy coverage works. If you need some clarification on how Medicare covers therapy, feel free to contact me.

**TAX PREPARATION TIPS FOR SENIORS AND RETIREES**

Tax season is here, time to make sure you have all the facts you need about regulations that can actually help seniors. Here are some tax preparation tips from the IRS:

- Remember the standard deduction for seniors. If you don't itemize, you can get a higher standard deduction amount if you and/or your spouse are 65 years old or older. There's an even higher deduction if either you or your spouse is blind.
- Be careful about the taxable amount for Social Security Benefits. Use the Social Security Benefits worksheet in the instructions for IRS Form 1040 and Form 1040A to make sure you're paying the right amount.
- If you need help preparing your return, the IRS offers free assistance for those who qualify.

1. Tips for seniors in preparing their taxes. IRS, accessed February 20, 2017, Web. < <https://www.irs.gov/individuals/seniors-articles/tips-for-seniors-in-preparing-their-taxes>.

## Email Marketing

The system offers a library of compliant, branded, customized emails that can be used for:

- ▶ Following up on the conversation
- ▶ Provide the free book
- ▶ Offer services and products
- ▶ Send out announcements

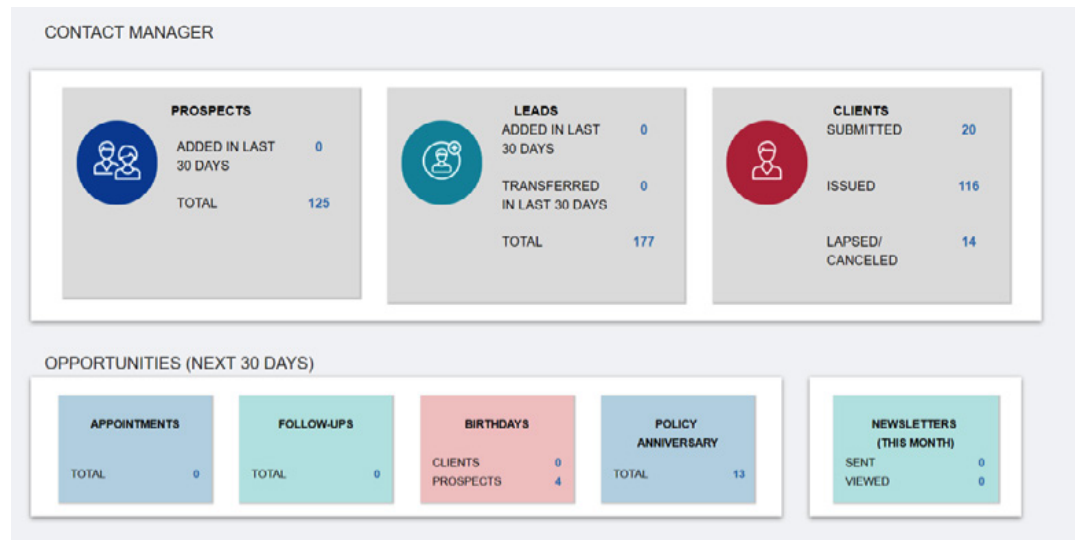


## Birthday Program

The majority of life insurance is purchased in the few months around a birthday. To make sure that prospects and clients know who to contact when they begin to think about their insurance needs, make sure your name is front and center. AMS makes it easy and quick for you to do this.

The tools you have include: birthday opportunity box on the home page, a system generated birthday reminder email, a birthday email and a birthday card.

On the opportunity homepage you can create a call or email list for upcoming birthdays in the next 30 days. To use this feature simply click on the number on the opportunity box.



To create your own list or plan ahead for upcoming months, go into search contacts, select the contacts in your system with a birthday in a particular month. Then check the box in the upper left hand corner to select all contacts. Follow these steps to get your list.

In your Contact Manager, click on search contacts.

**Contact Manager**

689 Results

Event Calendar for **Sam Smith**

Manage event calendar settings

Thursday, June 11	Friday, June 12	Saturday, June 13	Sunday, June 14	Monday, June 15
11-12p Meeting with ...	11-12p Meet up with ...			

First Last	Last Contact	Next Contact	Last Action: Note
Temp Phone Email City Zip County	Last Updated Date Added Status : Actions Taken		
<b>James Hill</b> PO BOX 1192 Turnersville, NJ 08054 jm@marketaccessdirect.com (435)623-7153 6/8/1945	23 hours ago 7 months ago 11 months ago	<b>FAST:</b> 6 months ago	Email Viewed: User viewed this email: View Email

Appointment Set: Call(3), Broadcast Email(9), Email Sent(9), Email Viewed(14), Email

broadcast email email call sub auto iss auto asb happy birthday emailopened debbie dog ralph

**Search**

Search

Search By Tag

Exclude By Tag

**Take Action**

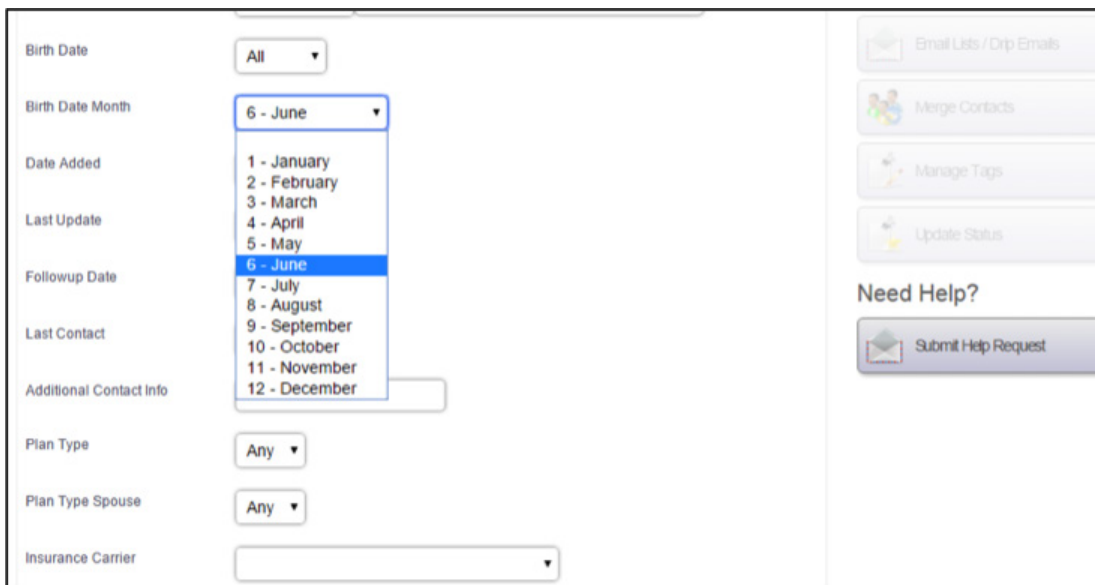
- Add New Contact
- Import Contacts
- Search Contacts
- Search "Mail Leads"
- Search Submitted
- Search Client

**Actions for Selected**

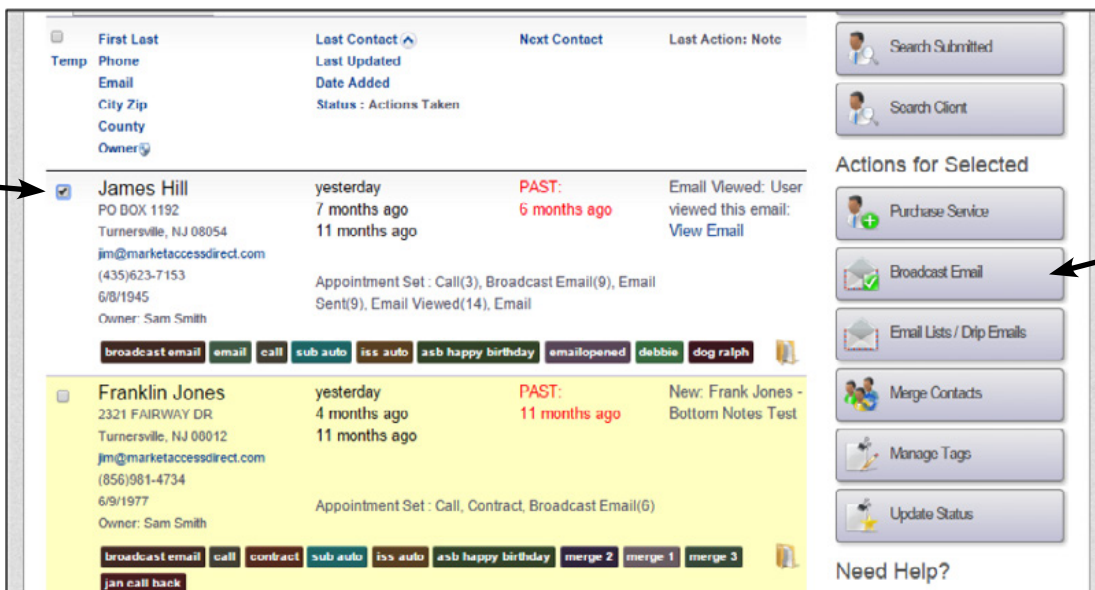
- Purchase Service
- Broadcast Email



Select which month you wish to filter your contact list by under search contacts and scroll down to the “Birth Date Month” section.

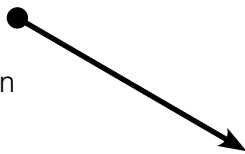


After “June” is selected as the search criteria, hit “search” to see your list of contacts with the filter applied. Now check the box in the upper left hand corner to select contacts.



Next send a birthday email to everyone with an email address. See the steps to do that here. After you have created your birthday mailing list, go to the broadcast email section under Actions for Selected on the right hand side.

Next, under message select **(Happy Birthday)** Then hit the “Send Now” button to send your birthday emails out. Your personalized details will be incorporated in the email once it is sent out.



Contact Manager

To

Larry Hall

You have selected 1 leads.


Message

Happy Birthday » Best Wishes for a Happy Birthday!

Subject

Best Wishes for a Happy Birthday!

Preview



Happy birthday!

Tag contacts with:

Add Tag...

Broadcast Email x Happy Birthday x

Save Only Send to Me Send Now Schedule Email Cancel

If the names do not have an email address you should consider mailing them a card. Pull your birthday list again but this time check the email “Empty” box as shown. This will give you a birthday list that you do not have an email address for the contact.

Phone	Like:	
Email	Empty	
Birth Date	Like:	
	Empty	
	Not Empty	
Birth Date Month	6 - June	

You can send all of these people a birthday card by clicking purchase service and following the instructions. Cards have a per piece expense which is less than the cost of going to the card store but more than sending an email. See the note below on asking for email address. If you do not have the budget to mail a card, use the list to make outbound phone call.



### **A thought on asking for an email address...**

As shown above the cost for sending an email is \$0.00 but the cost of sending a card is approximately \$2.00. Use this as motivation to ask for email address for each and every contact you have.

### **Use your e-newsletter to help you.**

When asking for email address simply say, *"I have a monthly newsletter that I send monthly via email. I'd really like to include you on that list if I could have your email for this newsletter only. I send it monthly and I really think you would enjoy it."*

Stating clearly that you only send the newsletter monthly and it is informational and not a hard selling piece is helpful in making people feel comfortable providing you with this piece of information.

## Sending a Thank You Card

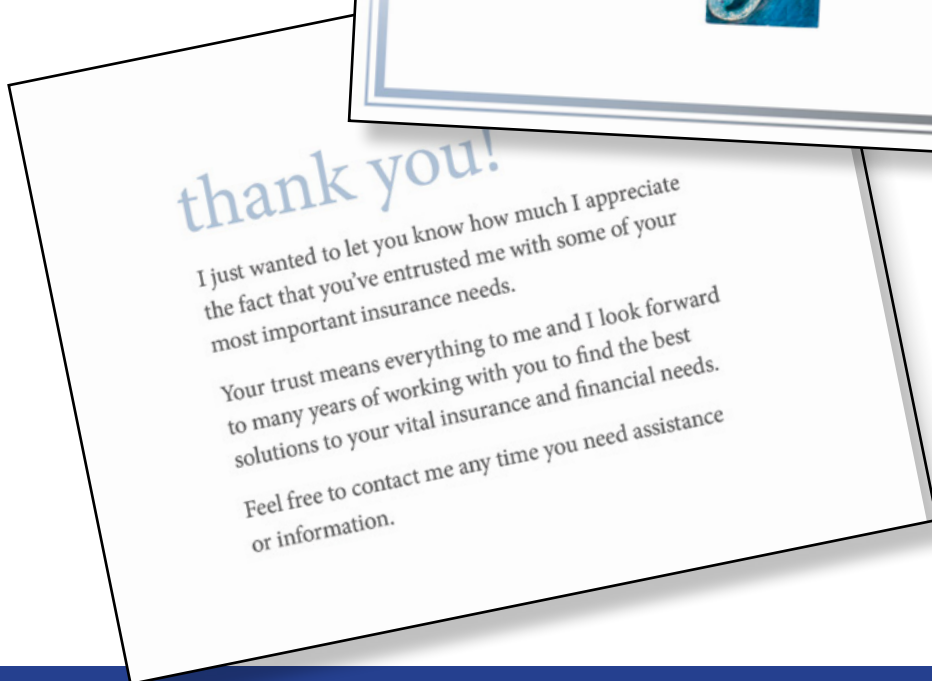
The best way to get referrals is to make sure your current customers are happy. It is always a nice touch to thank your customer for their business. This has never been easier when using the Thank You Card mail program in the AMS system.

The Thank You Card adds a nice touch when you are wrapping up the sale and can be sent after a policy is submitted or issued. The cards can be ordered directly in the AMS system and will be personalized to include all your information.

The cards can be ordered one at a time or order them weekly to cover all your submitted or issued clients that week.

The cards currently cost \$2.00 which includes 1st class postage directly to the client's home. This price changes periodically so check in the Purchase Service section of AMS.

**It has never been easier to send a Thank You card and your clients will be sure to appreciate that special touch.**



## Paper Newsletters

To order paper newsletters check the boxes for the people you want to have the newsletters mailed to. Then click “Purchase Service” button under Actions for Selected.

The screenshot shows the 'Contact Manager' interface. At the top, it displays '481 Results' and a search bar. Below the search bar is an 'Event Calendar' for 'Sam Smith' showing dates from Wednesday, January 24 to Sunday, January 28. The main area contains a list of contacts with columns for 'First Last', 'Temp', 'Phone', 'Email', 'City Zip', 'County', 'Last Contact', 'Last Updated', 'Date Added', 'Status : Actions Taken', 'Next Contact', and 'Last Action: Note'. Two contacts are visible: Larry Hall and Patrick Hardiman. The 'Purchase Service' button is highlighted in the 'Actions for Selected' sidebar.

Then select the “Monthly Newsletter” Option.

The screenshot shows the 'Cart Preview' interface. On the left, there is a list of items with checkboxes and right-pointing arrows. The 'Monthly Newsletter' item is selected and highlighted in yellow. On the right, the 'Cart Preview' section displays the message: 'Your cart is currently empty. You have 1 leads selected. Please adjust the quantity of items in your cart. You have 0 items for 1 leads'.


Next press the “add to cart” option at the bottom of the page.

Purchase Service > Monthly Newsletter

### Newsletter

**\$1.00**

**Description** | Features



*Medicare and Health Insights* is a newsletter that's easy to read and scan and is both informational and fun. It brings policyholders and prospects up-to-date on happenings with Medicare, healthcare, and financial needs and opportunities. At the same time it always shares a tasty, healthful recipe and suggests how to stay fit and enjoy yourself at any time of the year.

This program keeps you connected with prospects and clients. You are providing free, valuable and educational information on a consistent basis & becoming the agent of choice. This sets you apart from other insurance agents while highlighting your ability to provide a broad range of products and services to the senior market.

You can choose quarterly or monthly mailings. Insights is printed in full color on quality stock and is mailed with first class postage within 4 days of ordering. Each newsletter includes your picture and contact information. The names that are selected to receive the newsletter will be tagged with &newsletters-month. The first month will be *p-newsletter june*. Be sure the contacts you select have a complete address.

*Insights* is a great selling tool that lets you give clients something of value, free, while keeping your name and services at the top of their mind.

Qty:

[Add to Cart](#)

### Cart Preview

Your cart is currently empty.

You have **1 leads** selected. Please adjust the quantity of items in your cart.  
You have **0 items** for **1 leads**

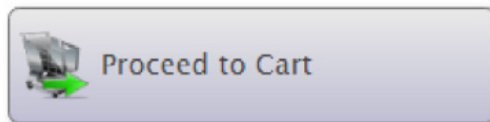
Now confirm that what you are adding to your cart is correct and click Proceed to Cart.

## Cart Preview

Newsletter

Quantity 1

\$1.00



You have **1 leads** selected.

Click Proceed to Checkout to be taken to the payment screen to complete your purchase.

Store > Cart Proceed to Checkout

You have 1 leads selected.

	Unit Price	Quantity	Subtotal
<b>Newsletter</b> <a href="#">Remove</a>	\$1.00	<input type="text" value="1"/> <a href="#">Update</a>	\$1.00
			<b>\$1.00</b>

Once you complete the payment screen, your order will be submitted and the cards will be mailed within 3 business days.

### Finding People that you Ordered a Paper Newsletter for.

Those who receive the paper newsletter get a tag. Search by that tag and call those people to get their email address.

The screenshot shows a CRM interface. On the left, a lead profile for James Greer is displayed with details: 1039 County Road Cn, Negaunee, MI, 6/17/2013. It shows activity for 'last year' (0 seconds ago) and 'last year'. An email sent is noted: 'The system sent this email: "ASB May Newsletter"'. Below the profile are tags: 'import', 'test', 'infofree', and 'paper newsletter'. On the right, a 'Search' panel is shown with a search bar, a 'Search' button, and two dropdown menus: 'Search By Tag' and 'Exclude By Tag'. An arrow points from the 'paper newsletter' tag in the lead profile to the 'Search By Tag' dropdown menu.

## Print on Demand

- ▶ Print all leads at once
- ▶ Other Print options include:
  - Print Unread (new),
  - Print Date Range (date added),
  - Print Selected (check box)
- ▶ PDF format 1 per page
- ▶ Printed tag added automatically
- ▶ Active for Managers but available upon request with Manager approval

