MARKET ACCESS DIRECT

AMERILIFE®

Prospecting System Training Manual

MARKETING PROSPECTING TRACKING

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Notes

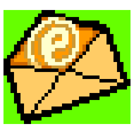
Market Access Prospecting System

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**

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

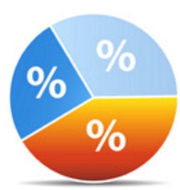
It is as easy as a few clicks to send a greeting card to your clients to let them know you are thinking of them around the holidays, on their birthday or to simply say, "Thanks!"

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

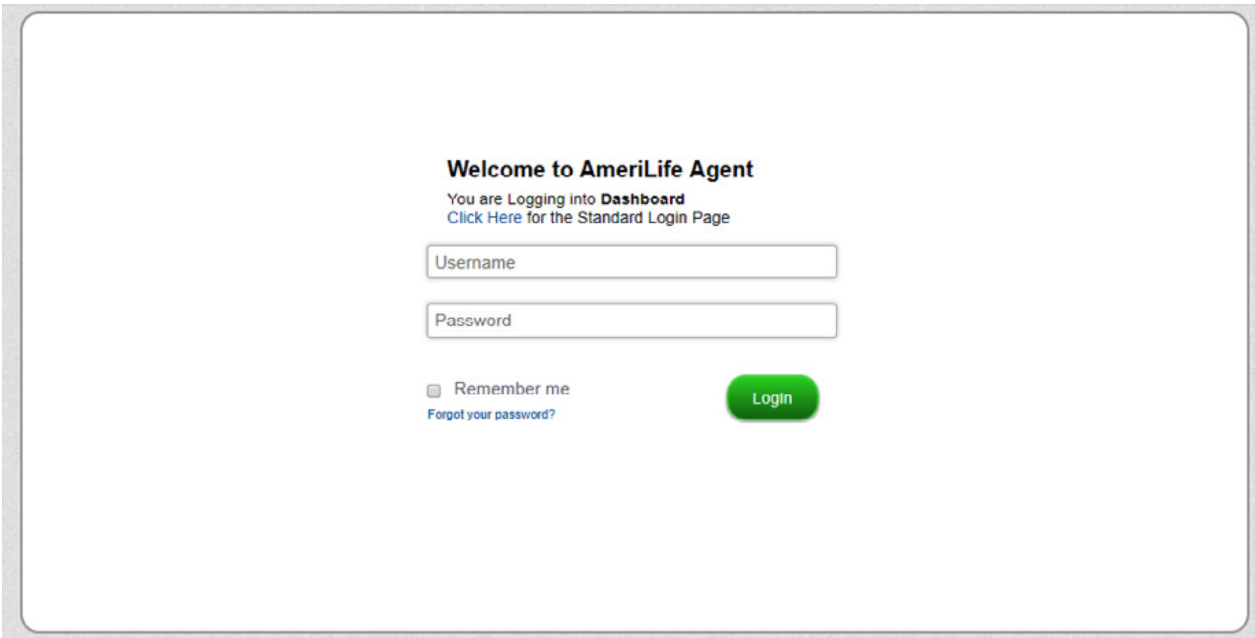
Your webpage is focused on building credibility, enabling you to provide information to your clients and prospects immediately and inexpensively – making you available 24/7.



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.

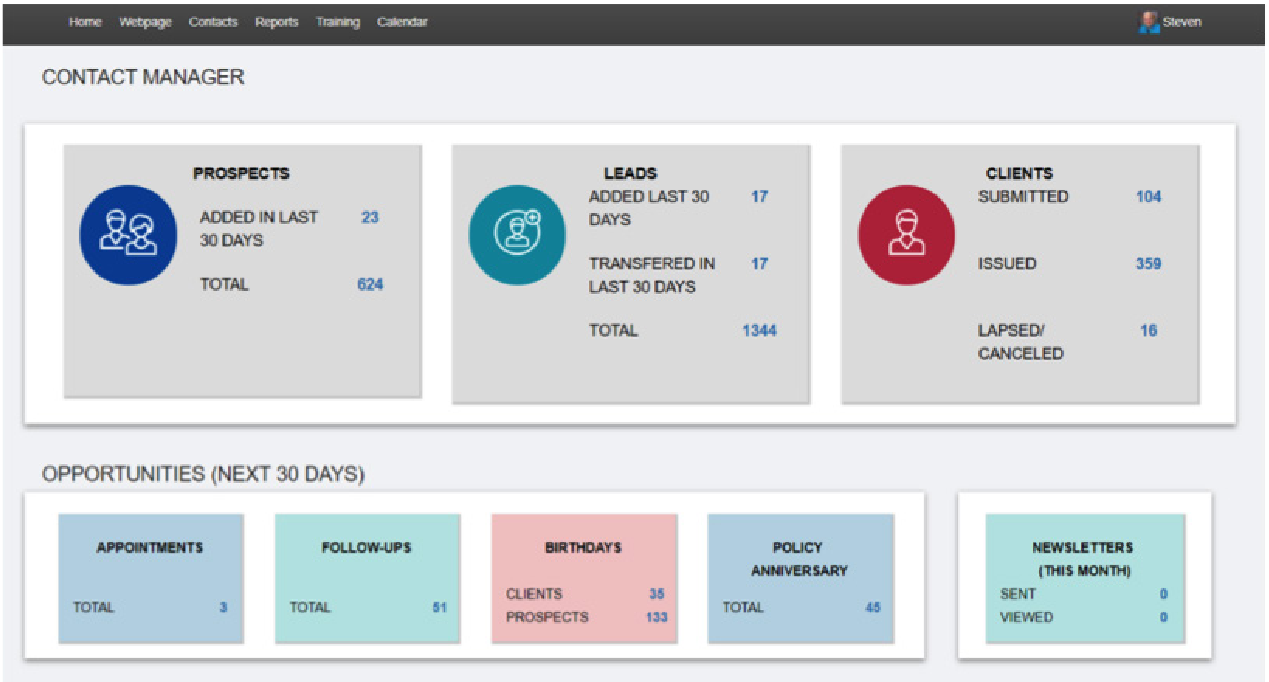


Website Address: www.alagent.net

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.

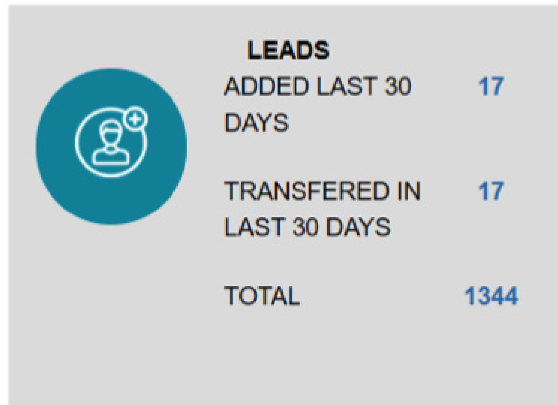
    b. **Total –** All the names that fit the criteria list above for a prospect.

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.

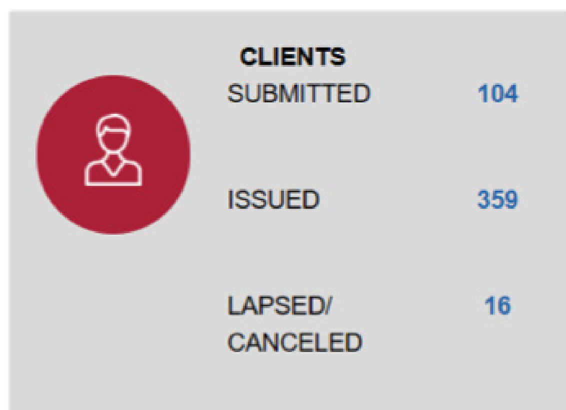


3. **Clients –** Names here will be broken into three groups. The groups are all based on Statuses.

    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.



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: **<u>NOT THESE:</u>**
   'Client', 'Submitted', 'Lapsed', 'Cancellation', 'Deceased', 'TOL – Take Off List', 'DNC – Do Not Call'

   Clients: **<u>ANY OF THESE:</u>**
   'Client', 'Submitted', 'Lapsed', 'Cancellation'

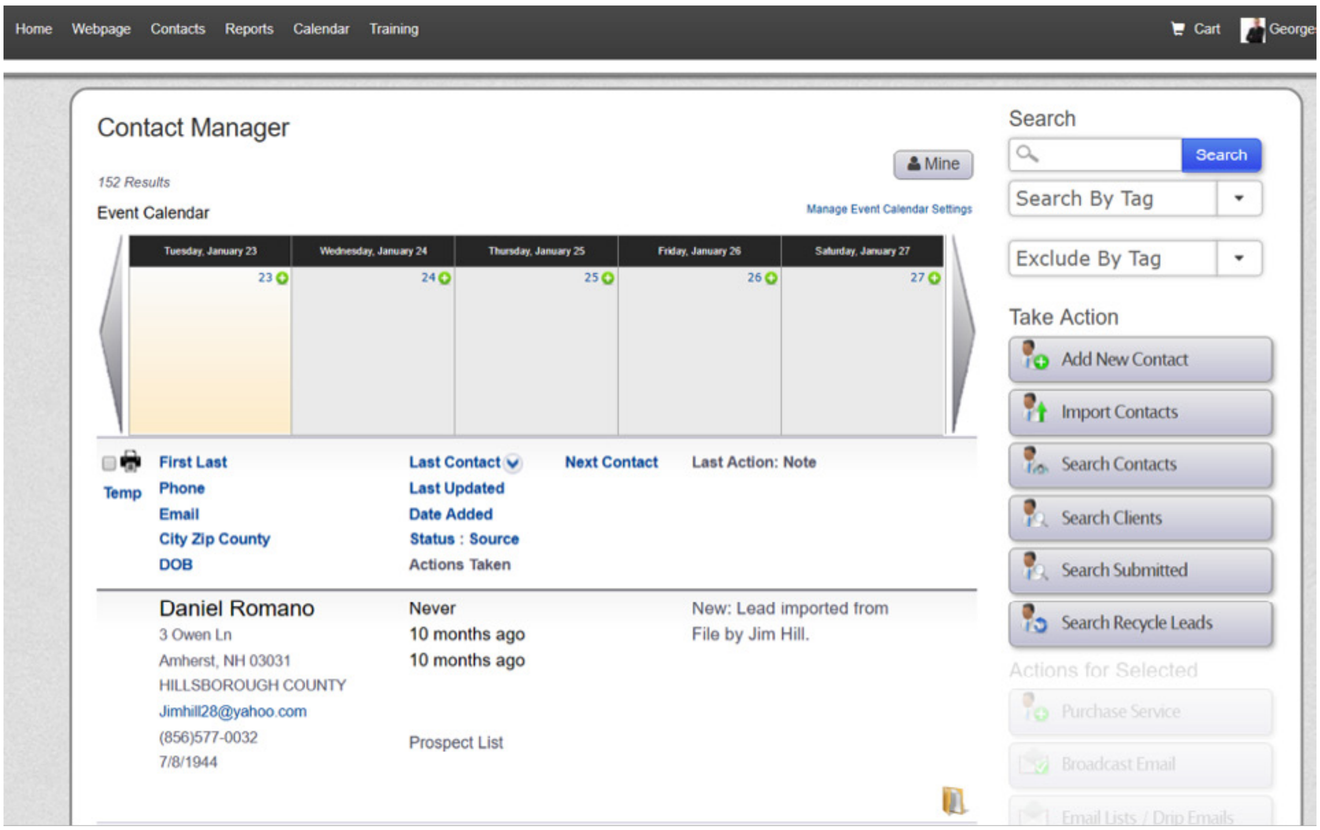
4. **Policy Anniversary –** This is based on the effective date in the policy section. This shows the number of clients that have a policy that will have an anniversary in the next 30 days.

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.

Contacts – List and Detail View

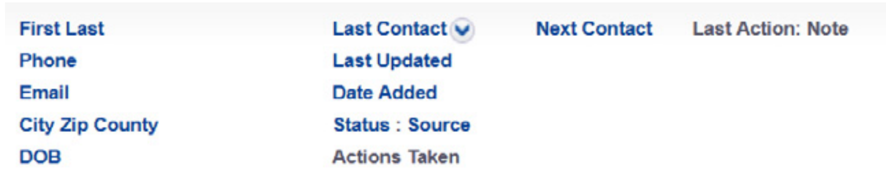
This section will explain how to search, view and work your Prospects, Leads and Clients as one group vs. individual groups. Start on the main dashboard and select Contacts on the top tool bar.

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.



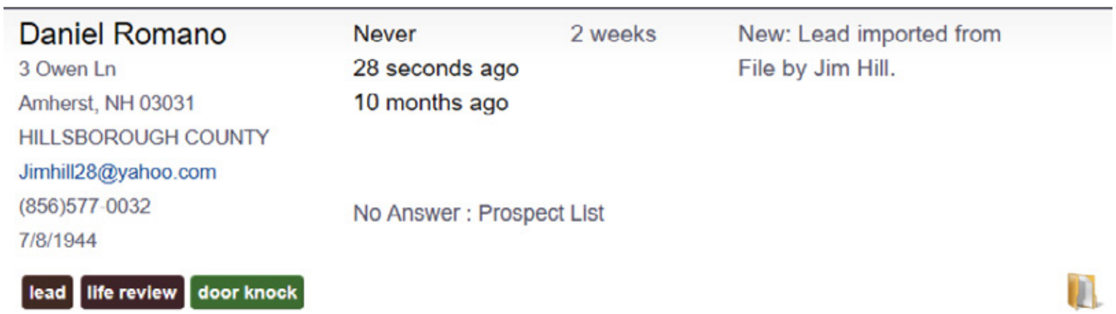
The first section at the top is the "events calendar." The calendar can be used to add appointments and follow ups which will allow you to manage your day and remember to follow-up when needed. For more details on the calendar see the calendar section.

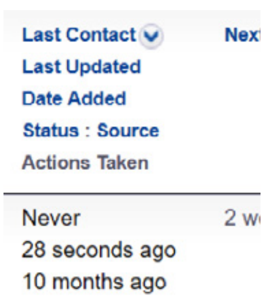
Below the calendar are the data headers. Your contacts can be sorted in multiple ways. On the top, you will see the blue header links that when clicked on, will re-sort your header view. For example, if you wanted to sort all of your contacts by "last updated" you simply click the last updated link and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



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.





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.

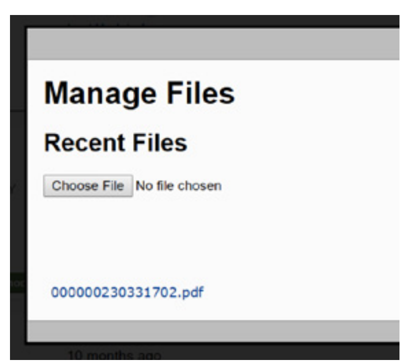
Source

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.

When you click on the folder the below pops up.



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.

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.

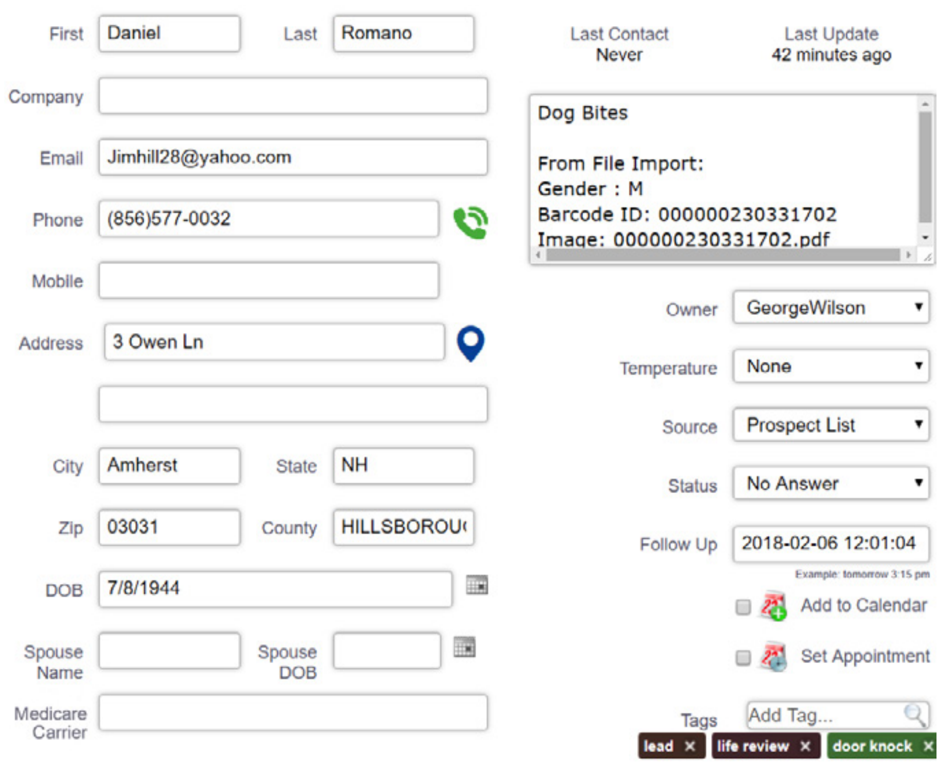
It starts with a blank section for additional contact details, for example, if the person is planning a trip to Alaska and you make a notation in the box, you won't forget to ask them how their trip was.

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.

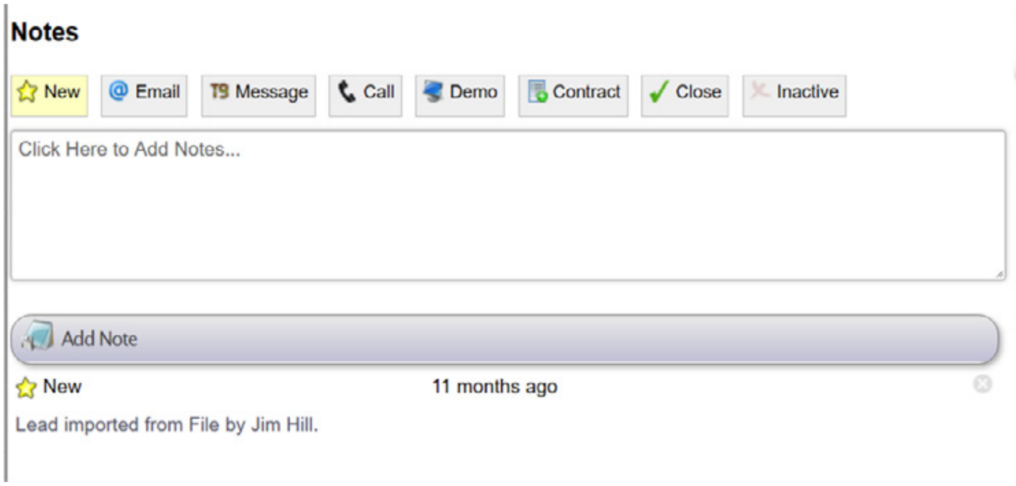
Status and follow up are also very important. You are able to change the status of the contact to accurately reflect where you are in the sales process.

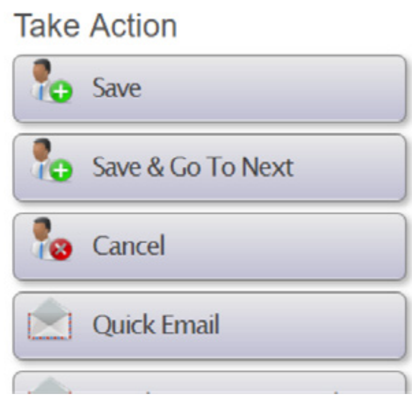
Below that is the 'Follow Up' option. If you type '1 Week' it will automatically create a follow up 1 week from now and you can add it to your calendar. You will receive an email 1 day before the follow up is due. Now you'll never miss a follow up!

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.



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.





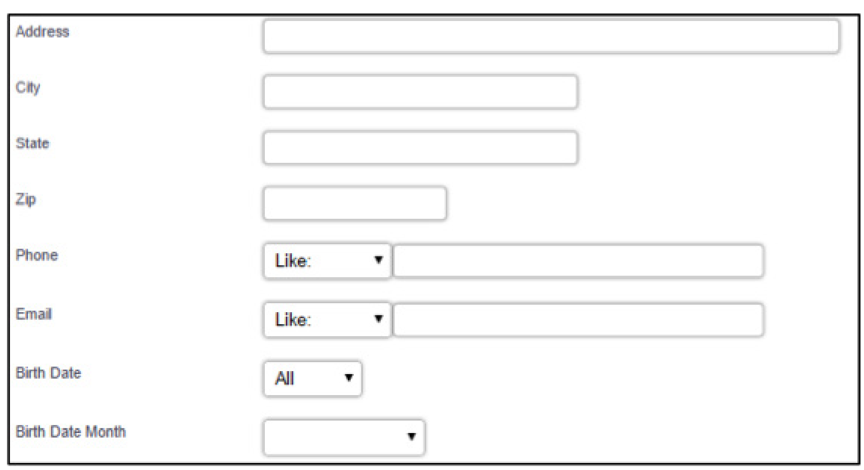
If you make any changes to the contact, remember to always click the 'Save' button at the top. If you want to Save this contact and move to the next contact, you can click the 'Save and go to next.'

Using search contacts for really quick results:

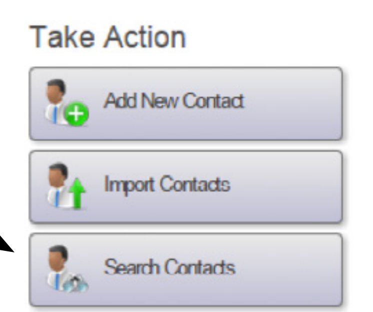
In order to maximize your search efficiency while using AMS, we highly recommend using the "Search Contacts" section of the CRM.

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!

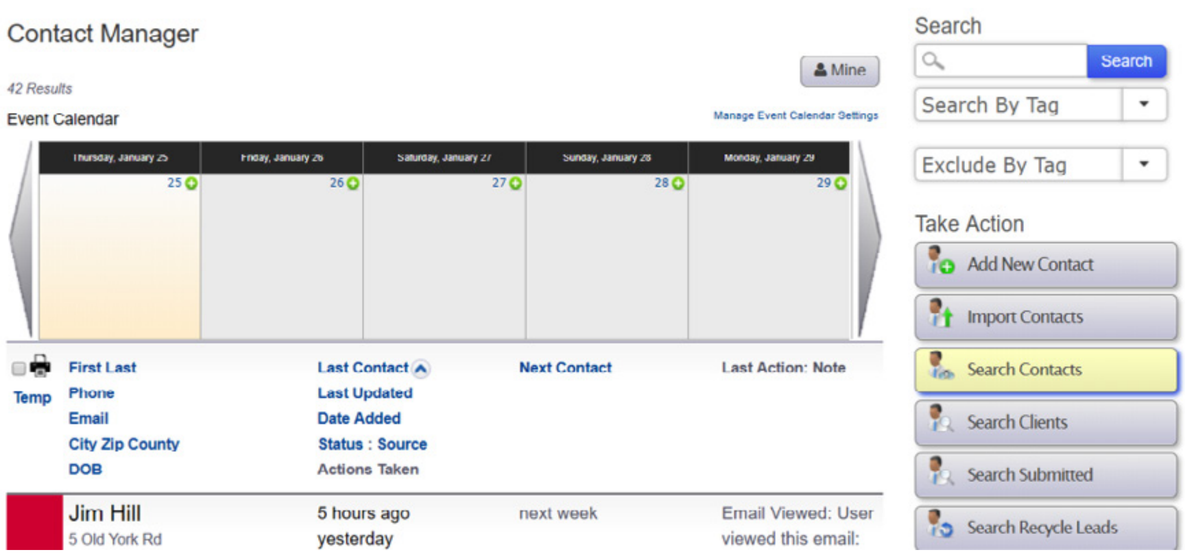


Creating a Prospecting or Call List

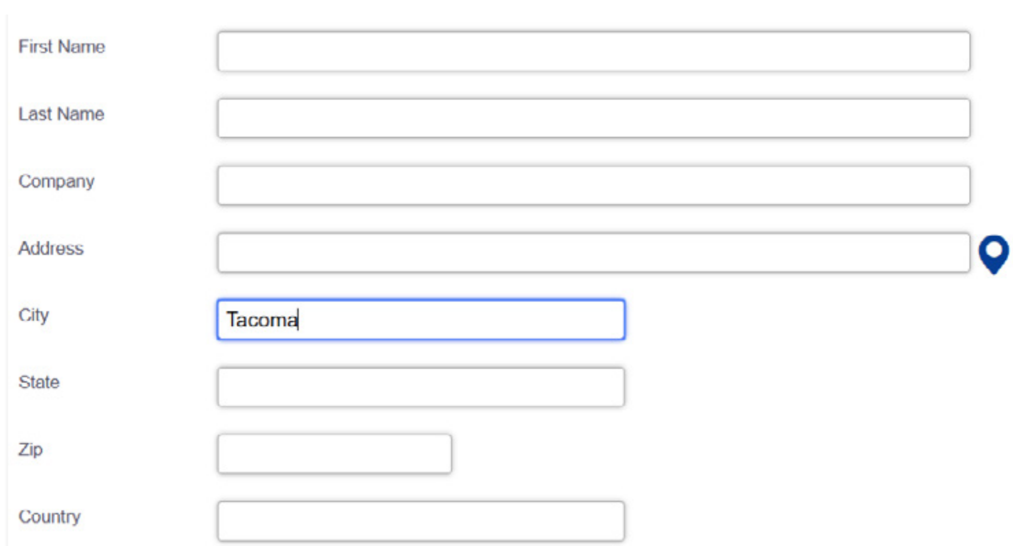
You can quickly search for the exact list of names you would like to prospect. The system allows you to narrow the list down to the exact names you need based on zip code, city, county or a number of other options.

Searching for Your List

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

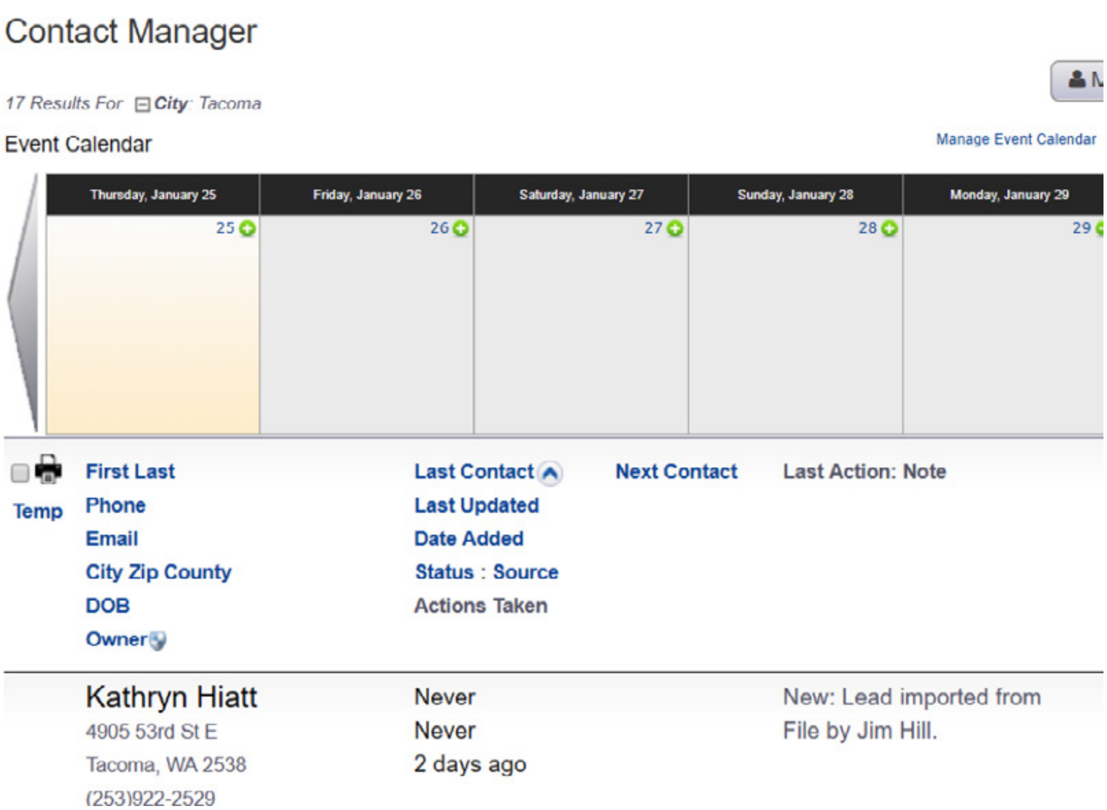


Put in the criteria you want to search for. In this example we will search on the City field.



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.



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.

1. **Step 1 –** Click on the “Contacts” tab.

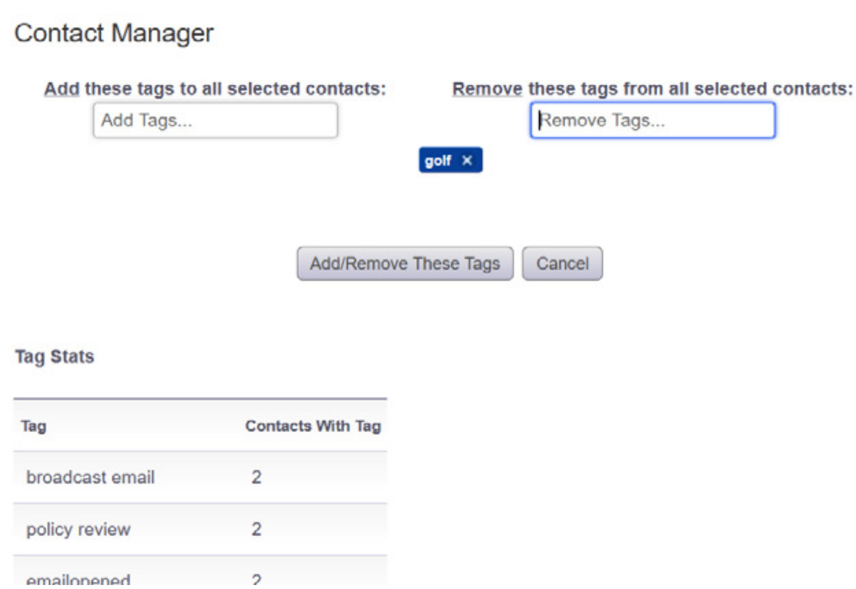
2. **Step 2 –** Select the names you want to add or remove Tags from by clicking the check box in front of the name or by selecting the whole list by clicking the check box above the word “Temp”.

3. **Step 3 –** Once you have the names selected, scroll down and on the right hand side, under Actions for Selected, click on Manage Tags.

4. **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”.

5. **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.

6. **Step 6 –** You will be returned to your list and can see that the “updated” Tag has been removed.



Merging Contacts

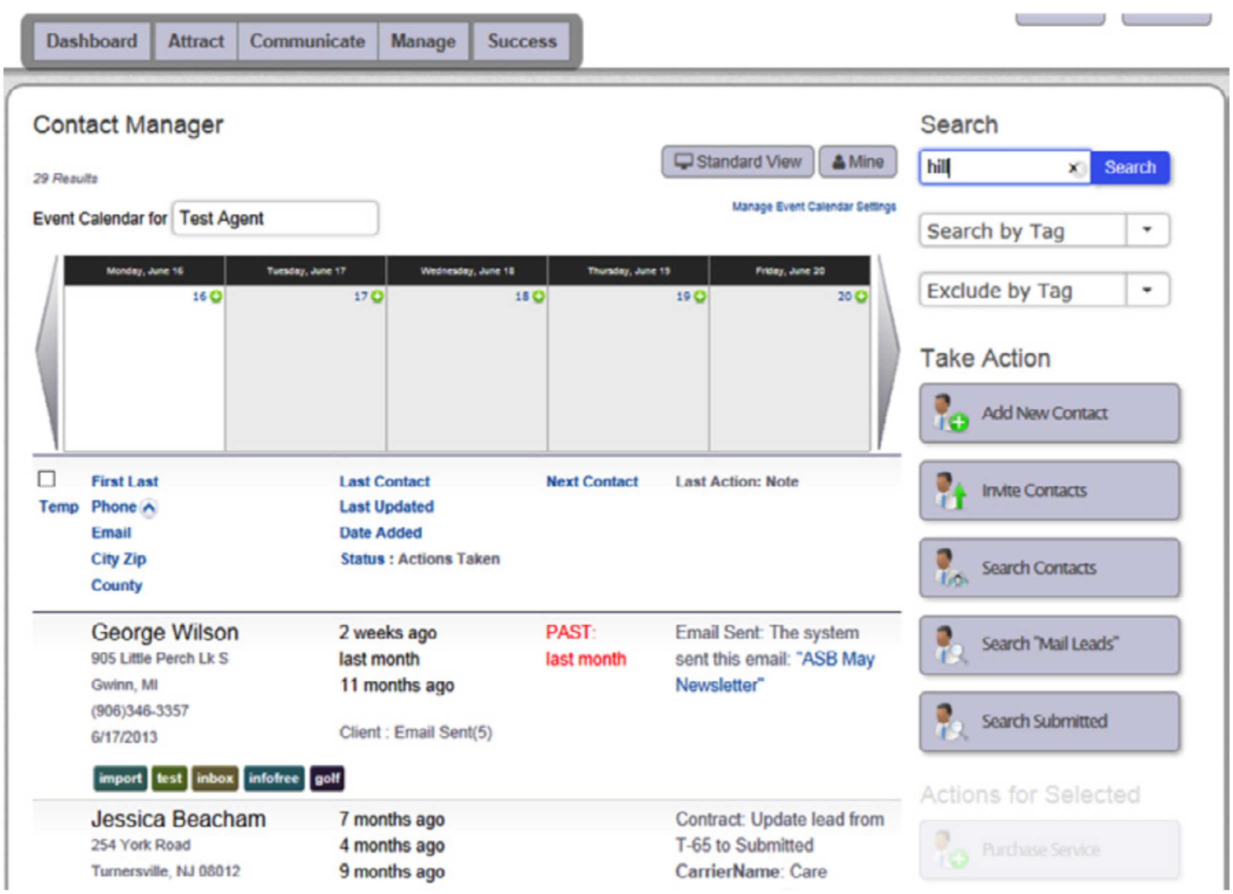
Merging Contacts in AMS

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.

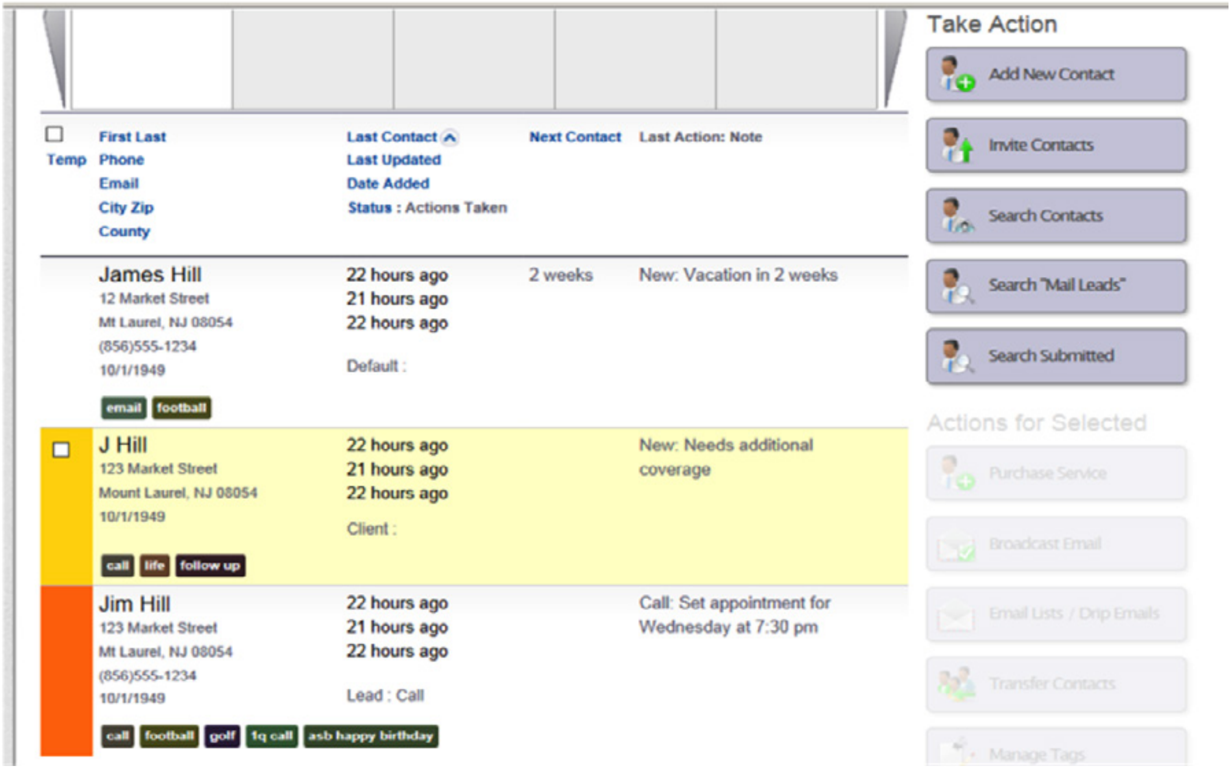
Search for the Contacts to Merge

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



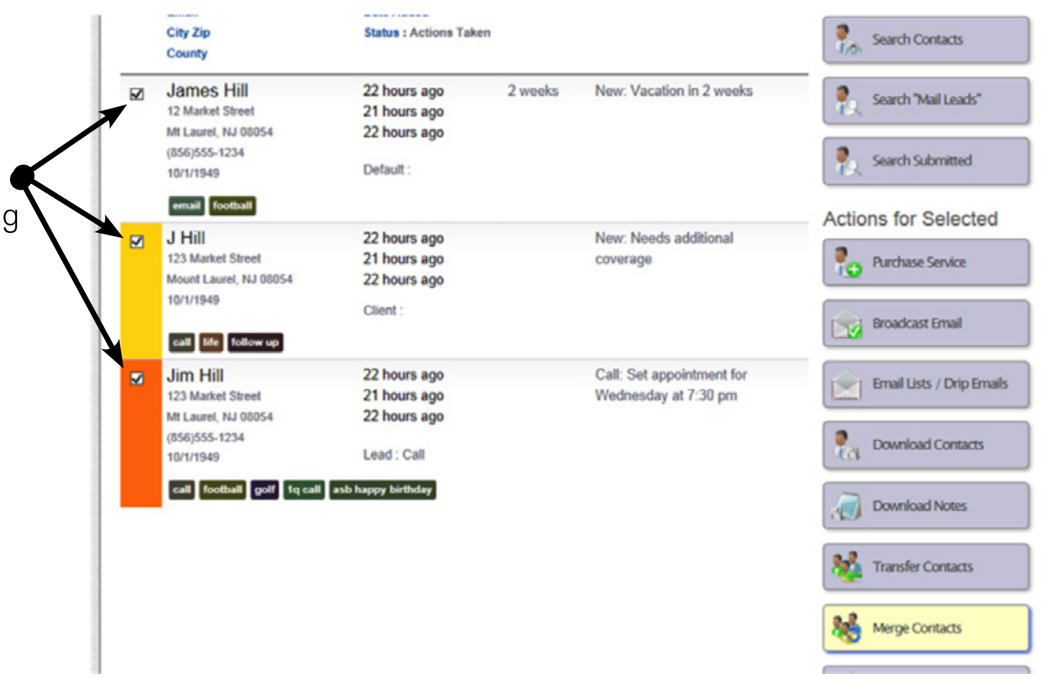
Search Results

All contacts fitting your search material will be displayed.



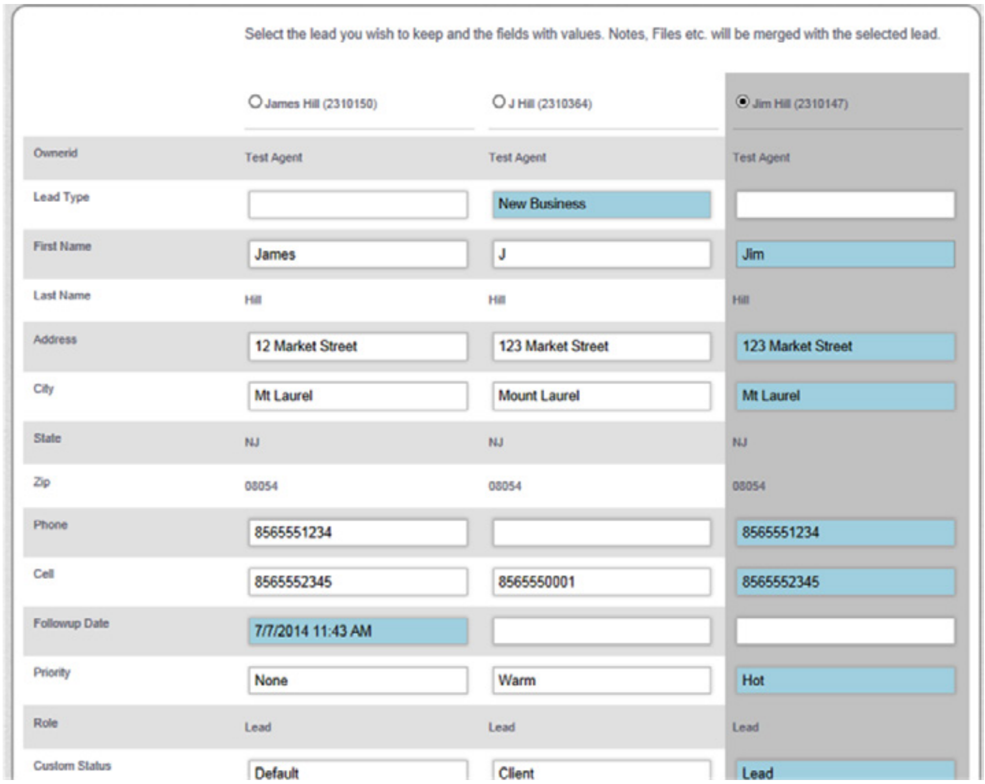
Selecting Contacts to Merge

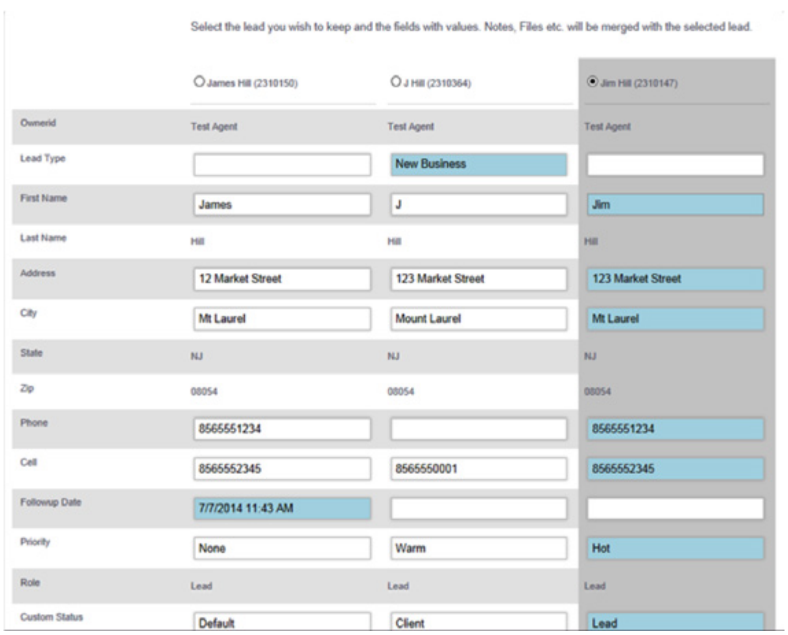
Select the contacts you want to merge by clicking the box next to the contact's name.
Click Merge Contacts.



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.





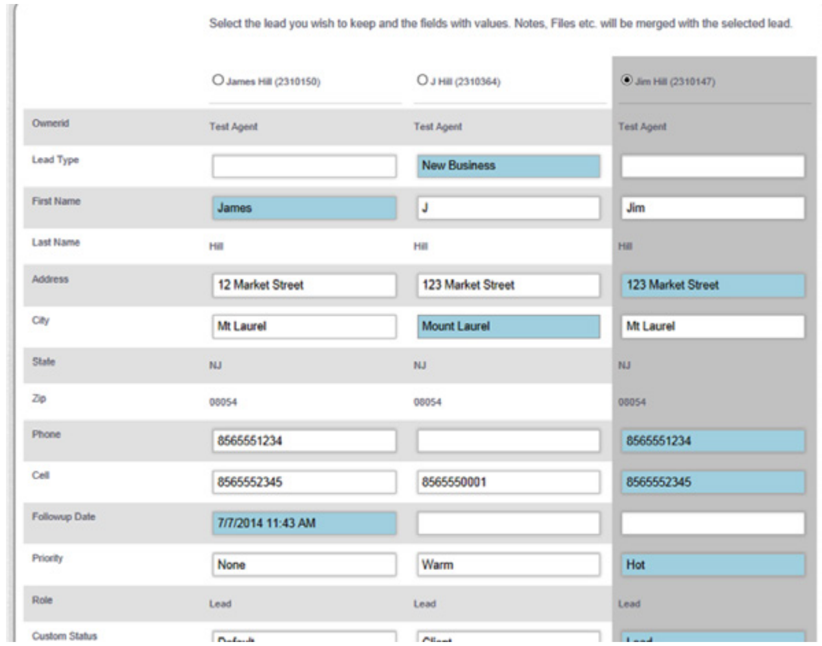
Highlighted Data

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

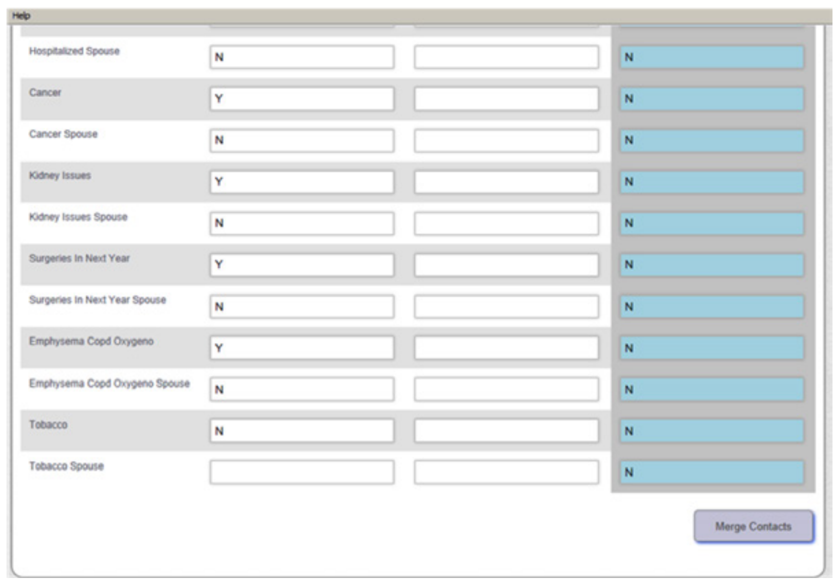
To select a different field, click on that field and it will become highlighted.

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



Merging Contacts

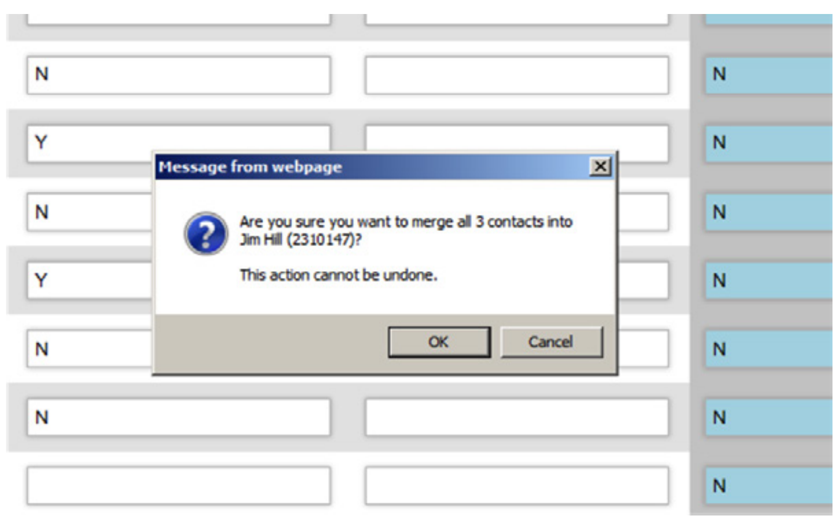
Click Merge Contacts when you have completed selecting the fields you want in the merged file.



Confirming the Merge

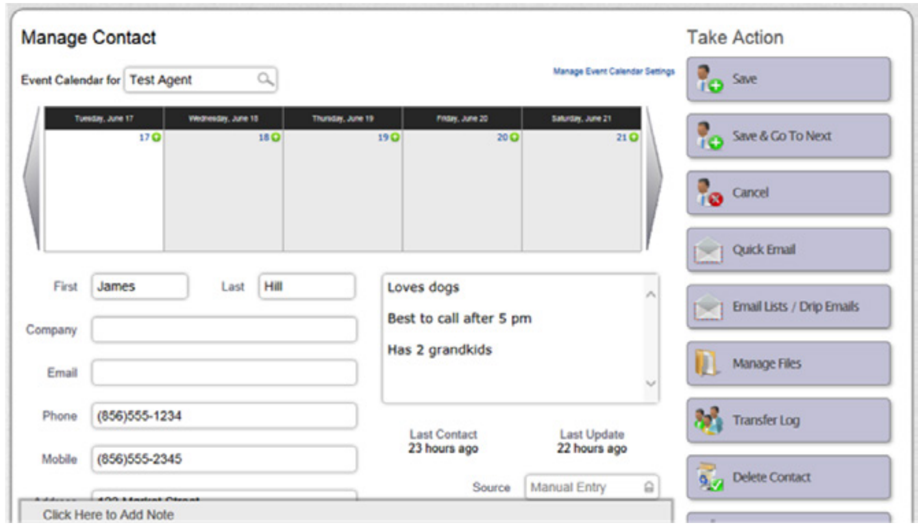
You will receive the above message to confirm the merge.

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

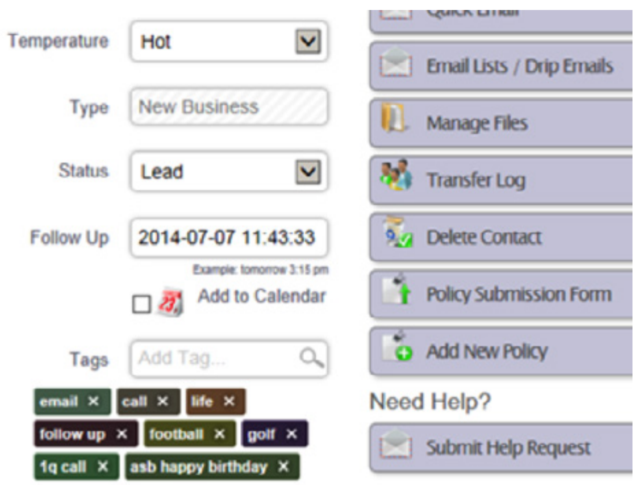


Final Contact Merge

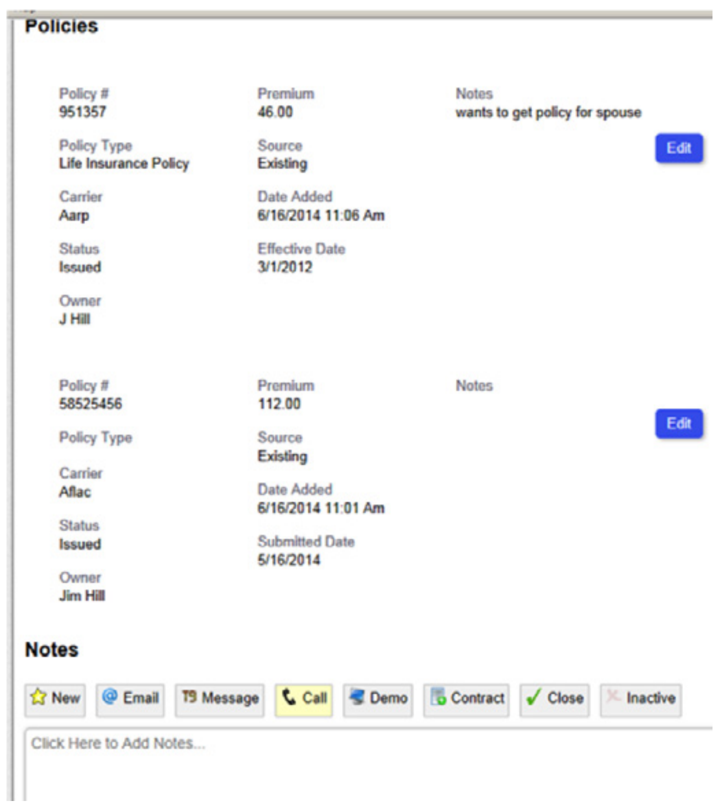
After the merge is complete the system will return to the new (merged) contact record. **Note the Additional comments at the top of the record have been combined.*



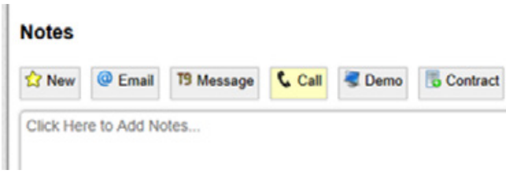
The tags from all 3 records have been combined as well.

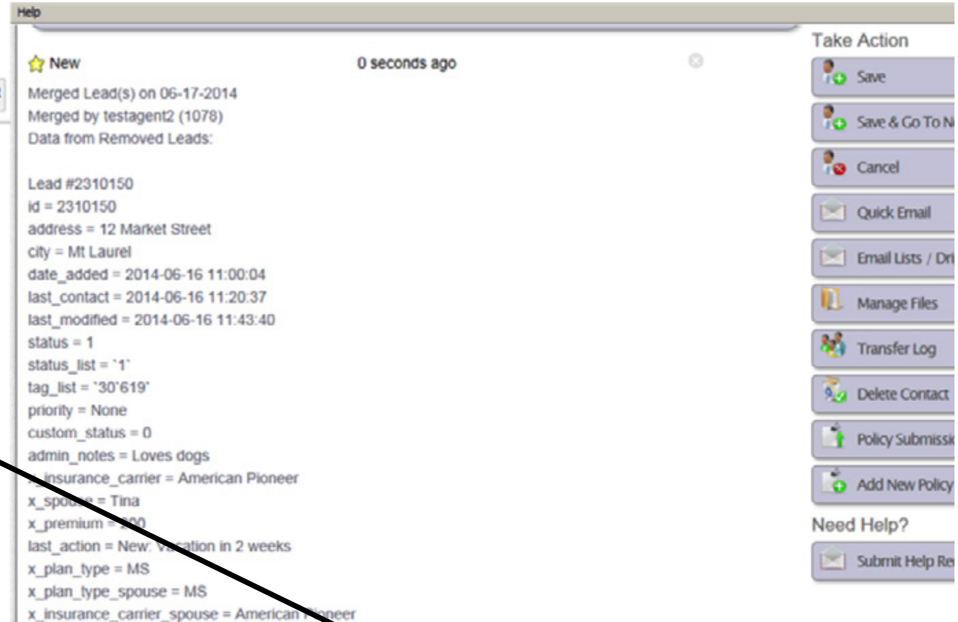


Policies have been moved to the new contact.

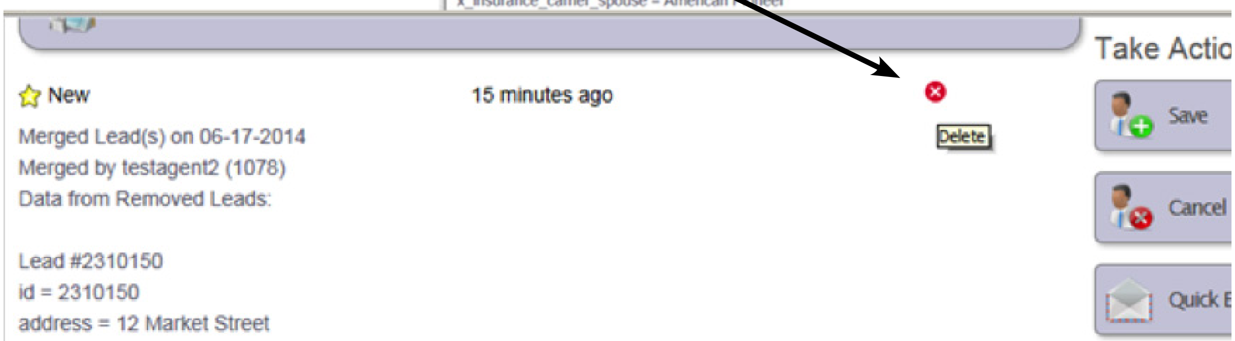


In the bottom notes there is a section that displays the data from the merged contacts that was not kept. This is the only place that information from the merged contacts will appear.

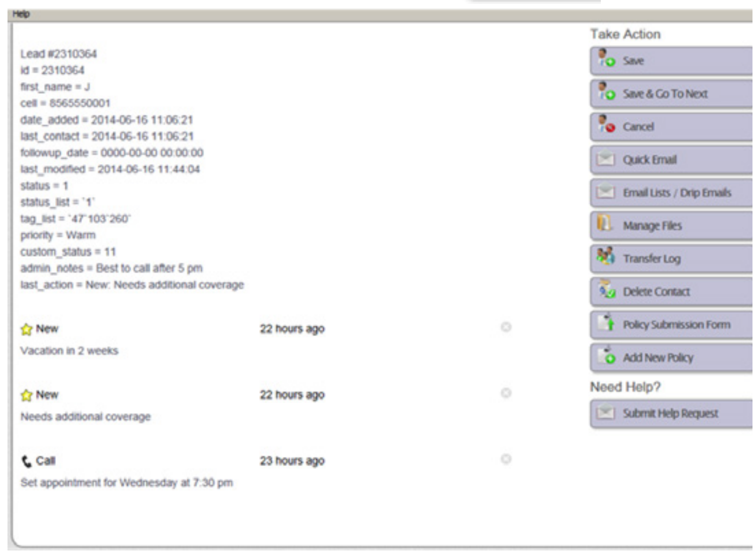


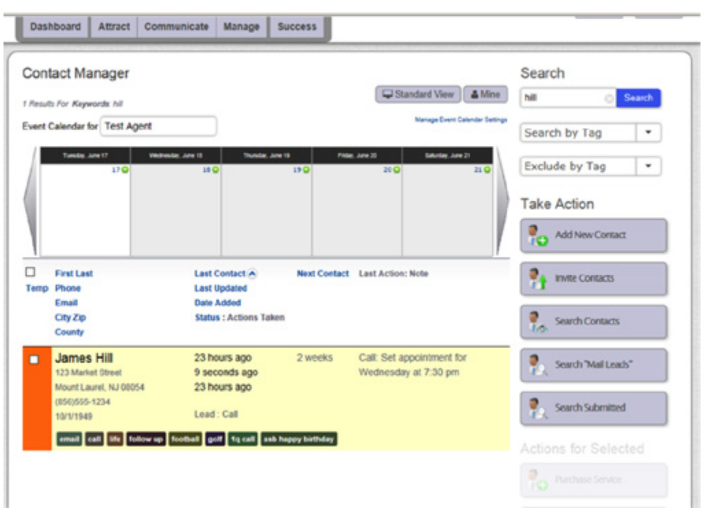


This data can be deleted by clicking on the X to the right of the notes. If you choose to delete these notes ***they cannot be retrieved again.***



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





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

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

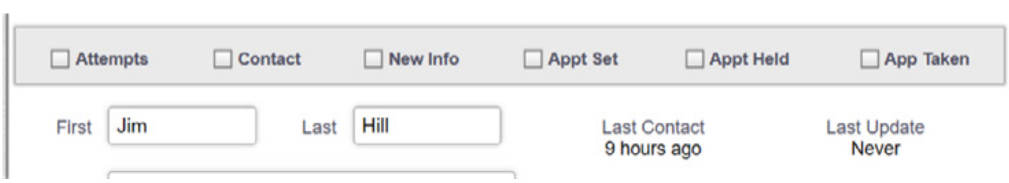
New Info
Any information that you collect on the contact

Appointment Set
Appointment Set

Appointment Held
Appointment Held

Activity Tracking – LAYOUT

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



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.

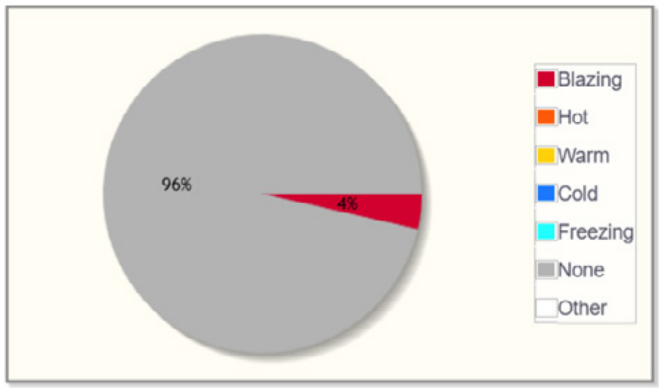
Contact Temperature Report

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.

Contact Temperature

Priority	Count
BLAZING	**1**
HOT	**0**
Warm	0
Cold	0
Freezing	0
None	27
Other	0



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.

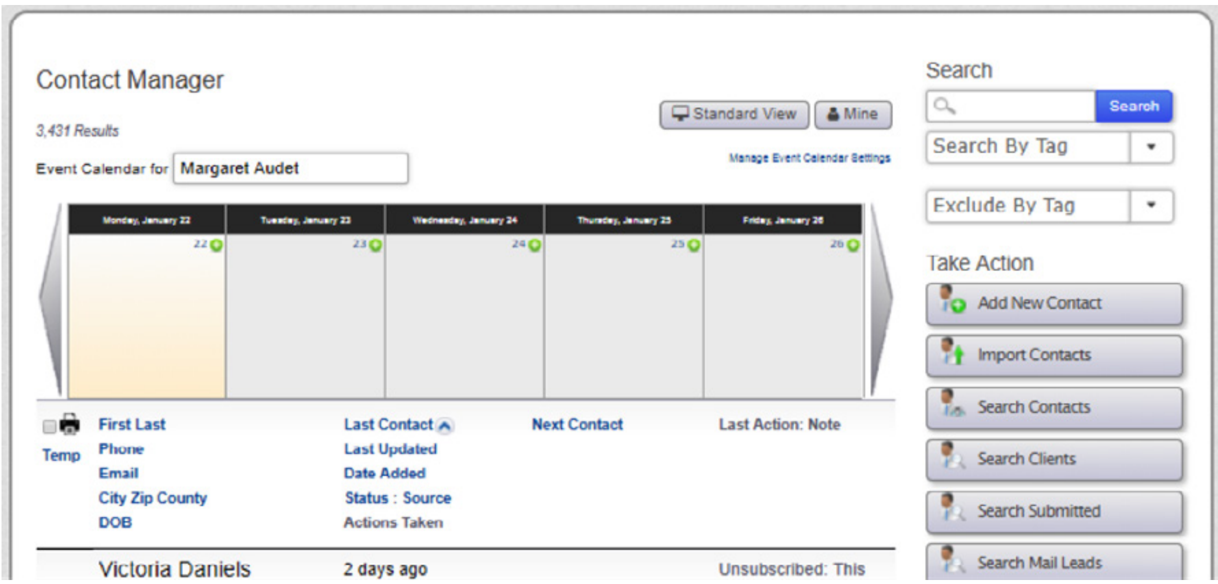
Leads Added

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.

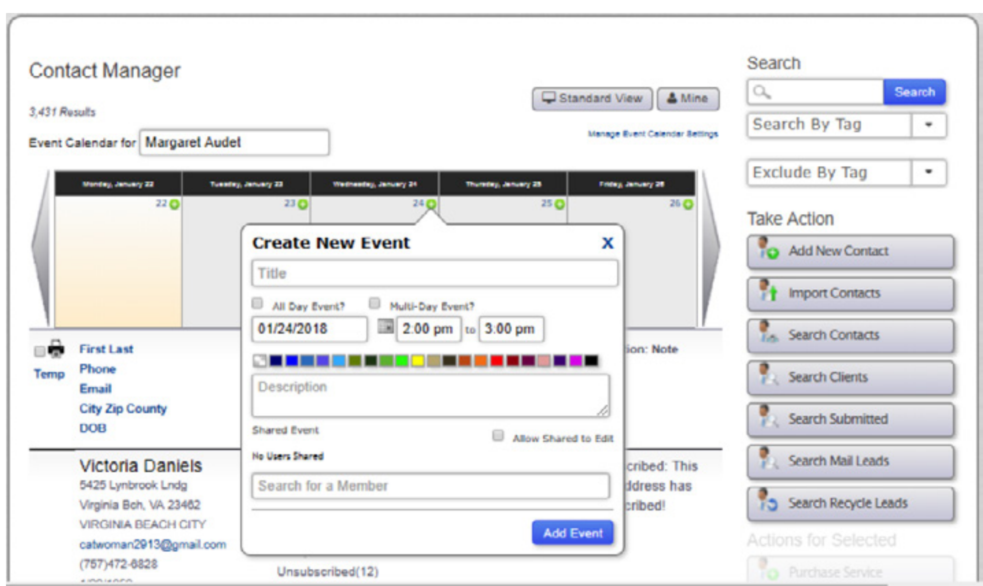


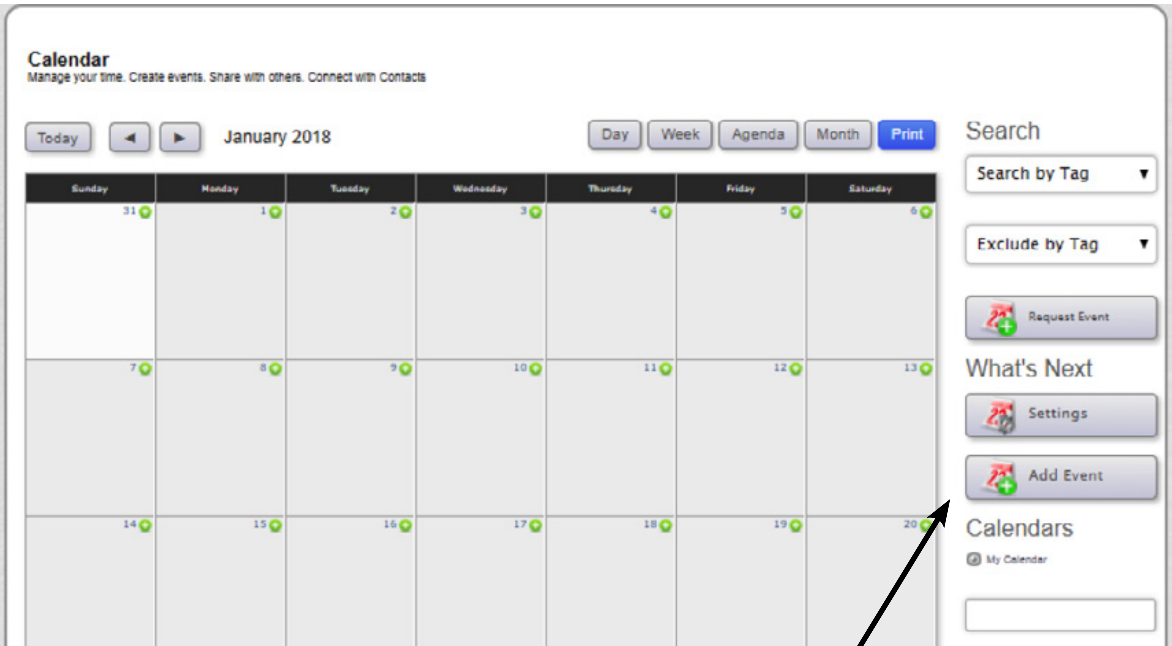
To add an event to the calendar open a contact and decide on the date of the meeting and click on the green plus sign. This opens the "Create a New Event" box. Fill out the details and click Add Event. The event will now be on your calendar. The contact's address is added to the event. There must be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

Calendar Tab

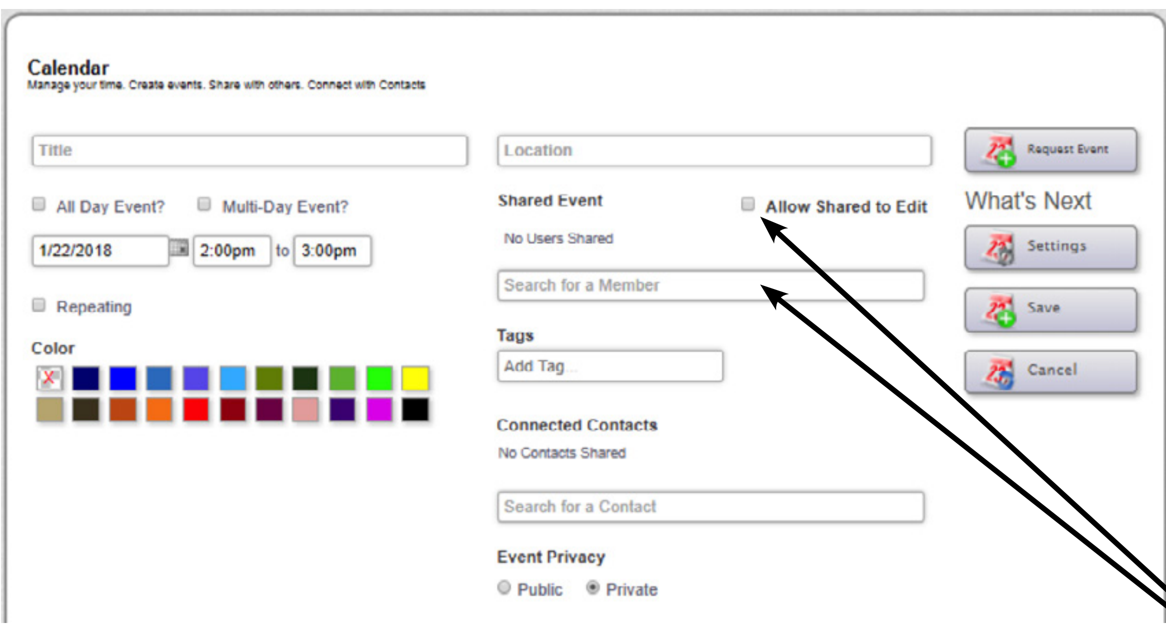
Another way to add an event to the calendar is to click on the Calendar tab and then click Add Event.

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 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 or 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.

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.

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


WISE AND WELL
Healthcare & Wellbeing Newsletter

Welcome to the MARCH 2017 ISSUE!

Compliments of

JIM HILL

It's time to transition from winter to spring, 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: 856-677-0032

Email me at
Jim@marketaccessdirect.com

or visit my web page
www.jimhill.marketaccessdirectdemo.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[1]:

- 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.

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 send 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.

Email Marketing

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

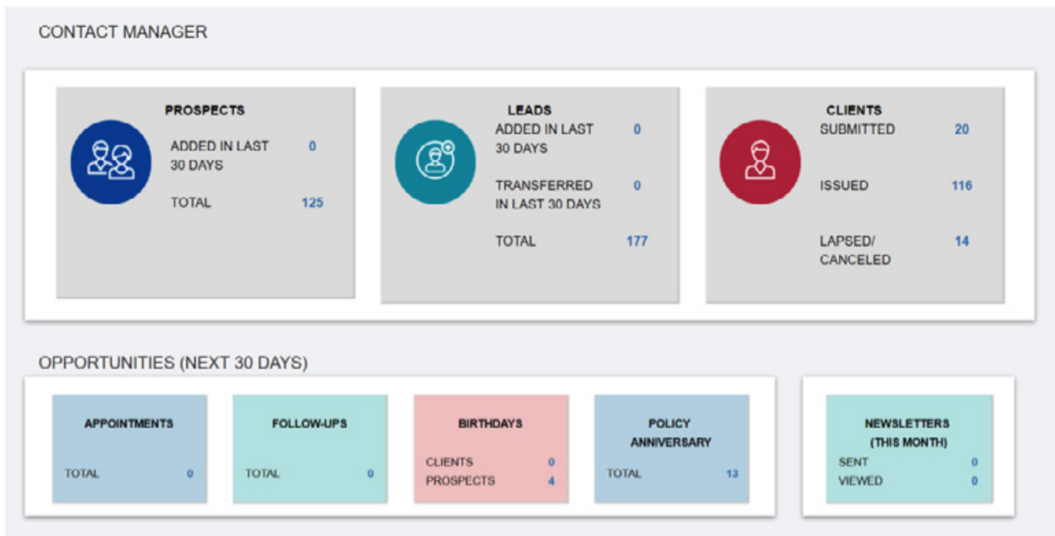
- Following up on the conversation
- Provide the free book
- Offer services and products
- Send out announcements

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.

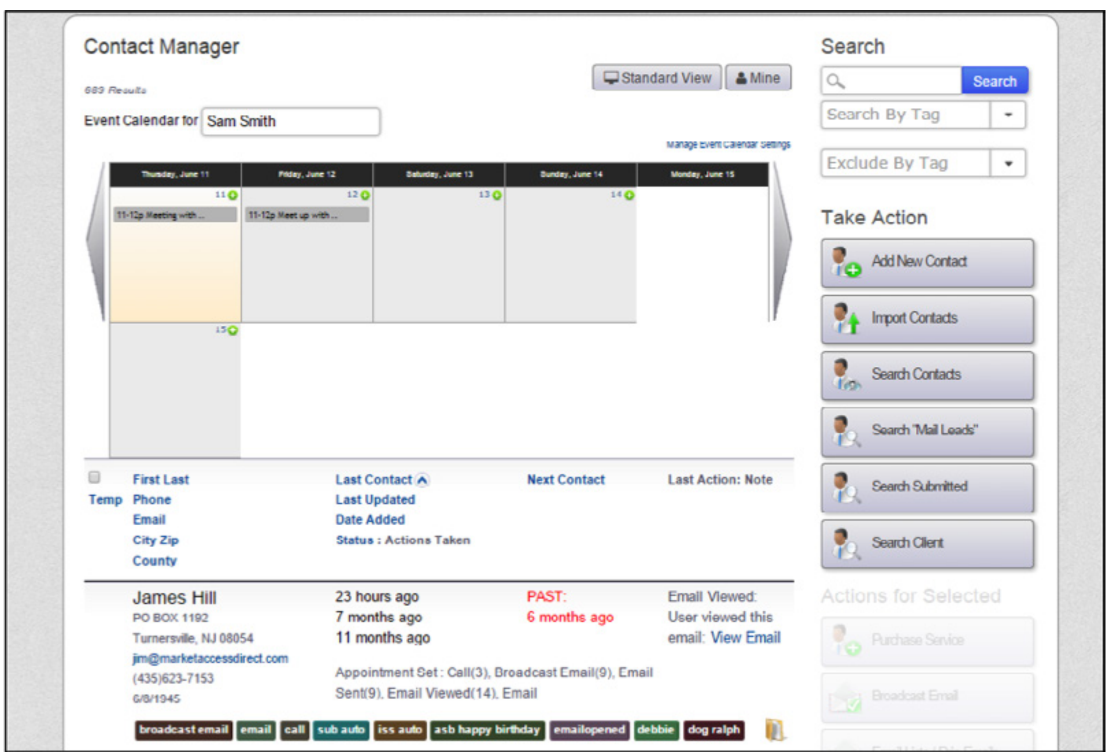
The tools you have include: birthday opportunity box on the home page, a system generated birthday reminder email, a birthday email and a birthday card.

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

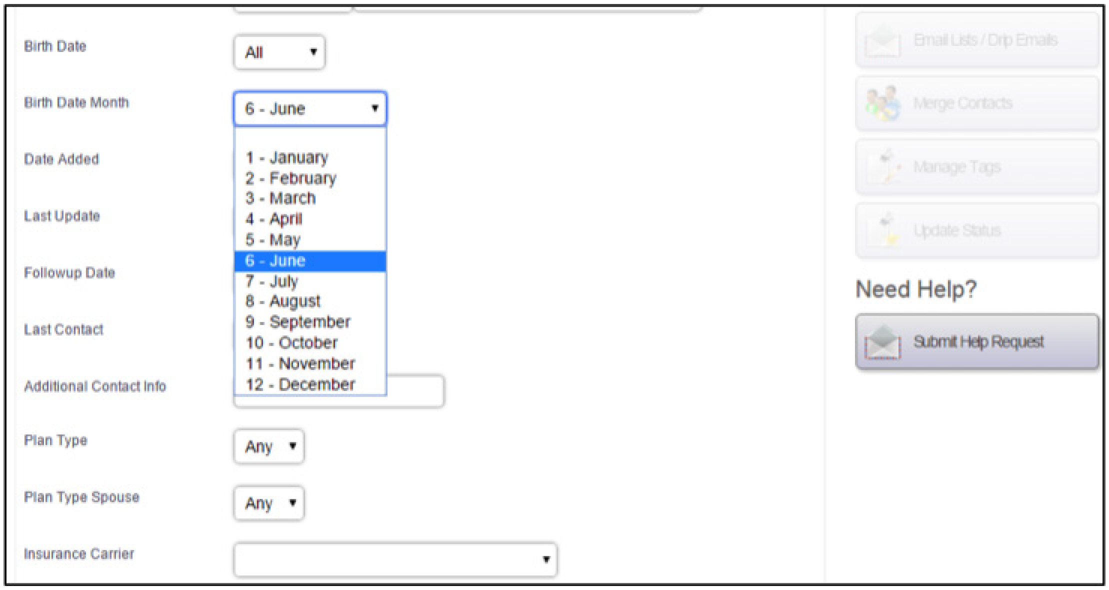


To create your own list or plan ahead for upcoming months, go into search contacts, select the contacts in your system with a birthday in a particular month. Then check the box in the upper left hand corner to select all contacts. Follow these steps to get your list.

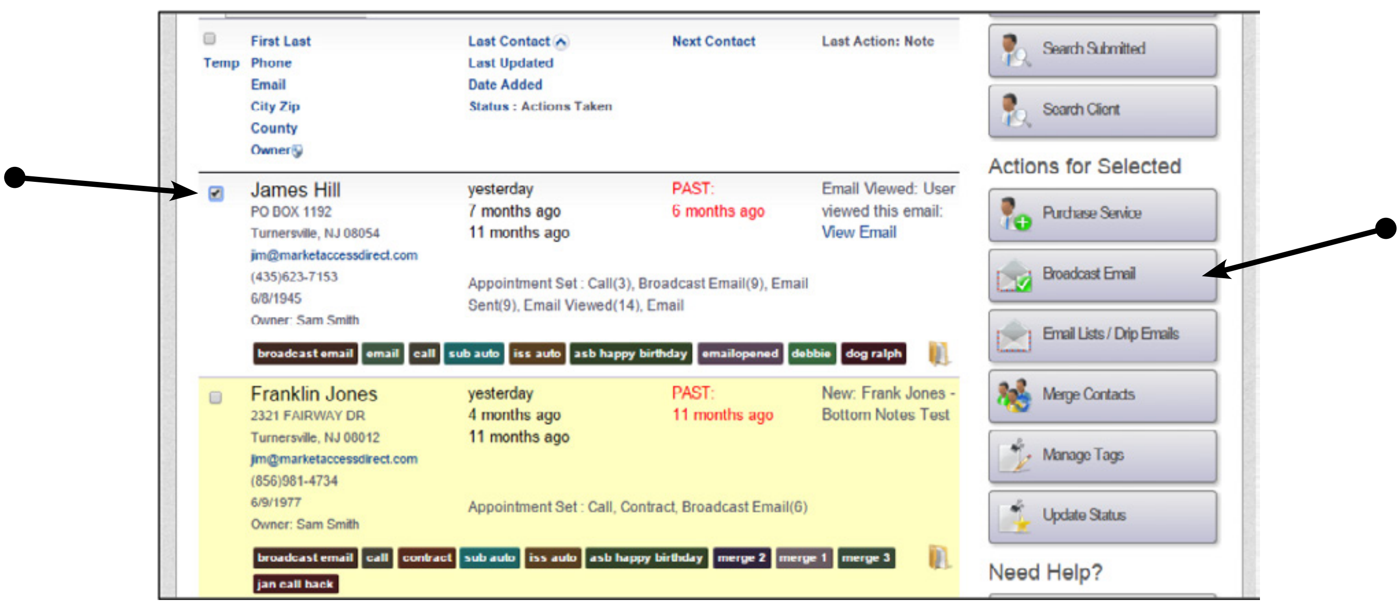
In your Contact Manager, click on search contacts.



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

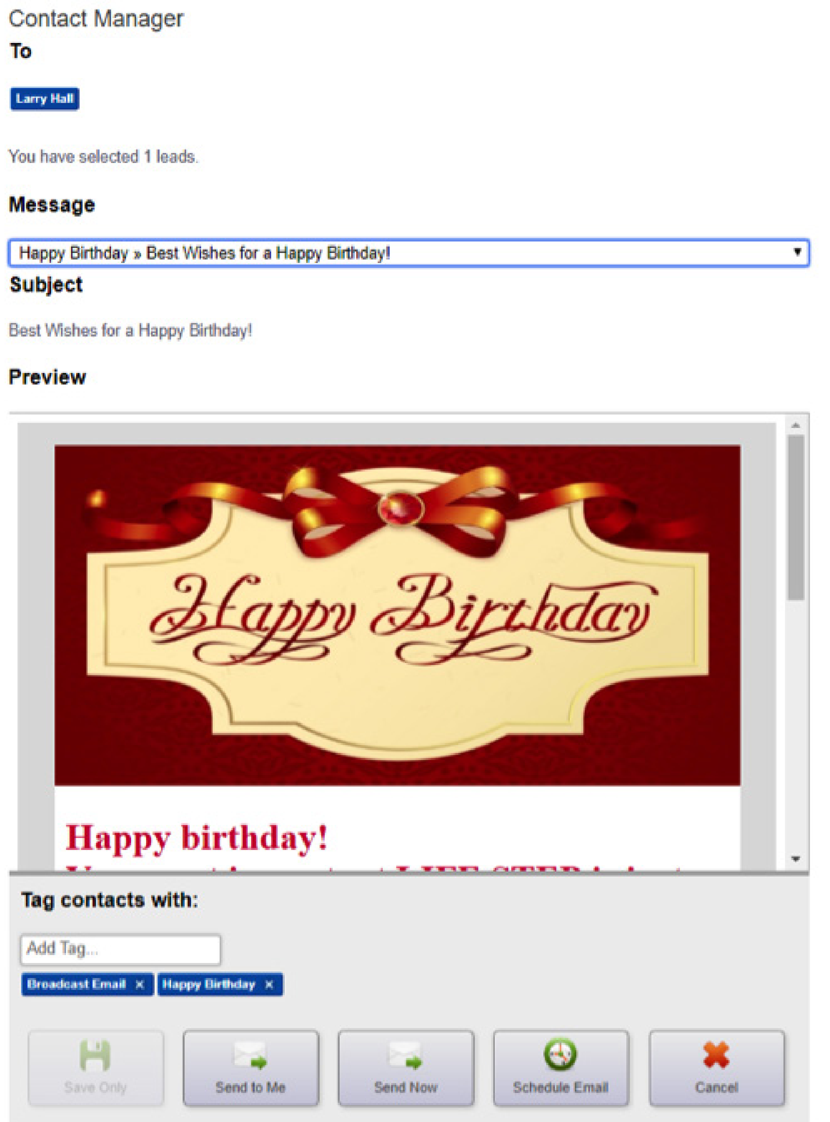


After “June” is selected as the search criteria, hit “search” to see your list of contacts with the filter applied. Now check the box in the upper left hand corner to select contacts.

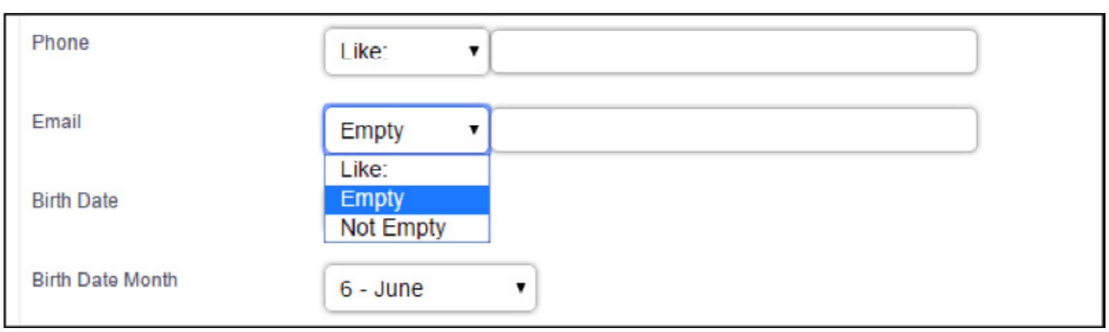


Next send a birthday email to everyone with an email address. See the steps to do that here. After you have created your birthday mailing list, go to the broadcast email section under Actions for Selected on the right hand side.

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.



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.



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.

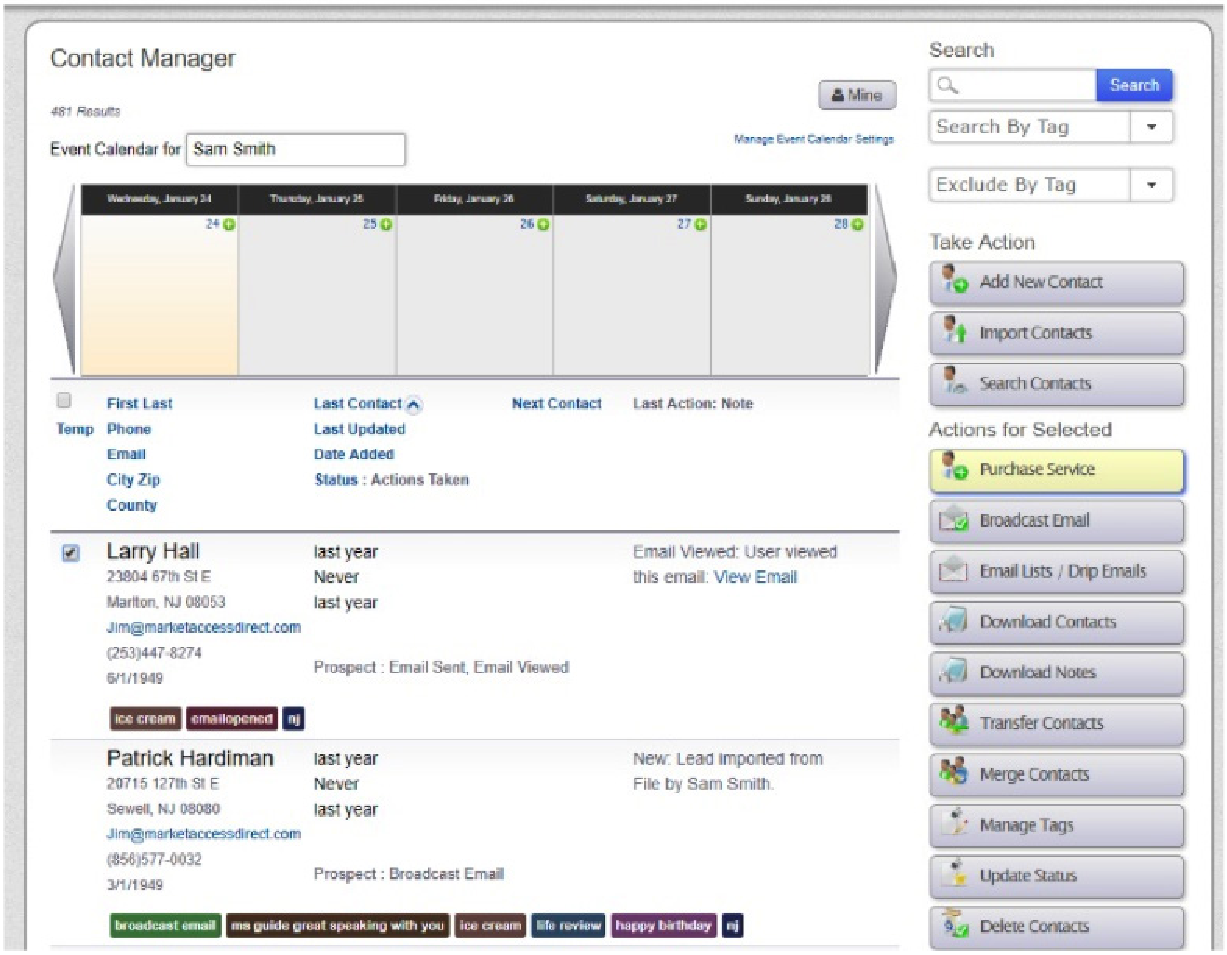
The cards can be ordered one at a time or order them weekly to cover all your submitted or issued clients that week.

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.

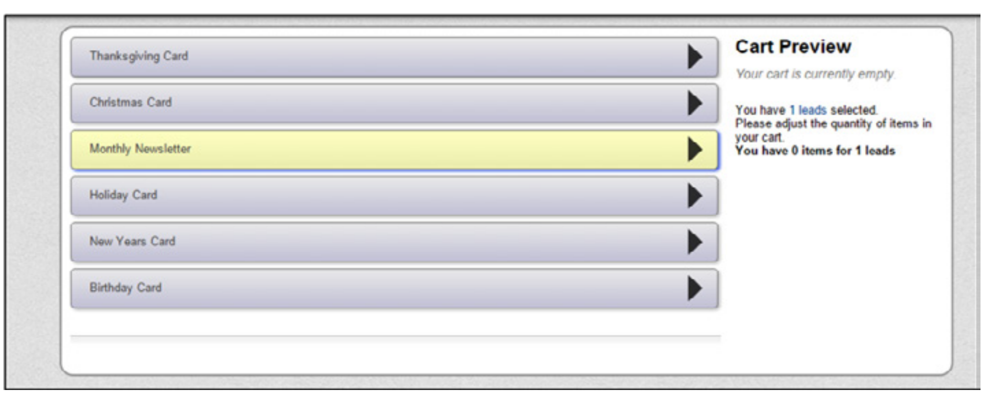
It has never been easier to send a Thank You card and your clients will be sure to appreciate that special touch.

Paper Newsletters

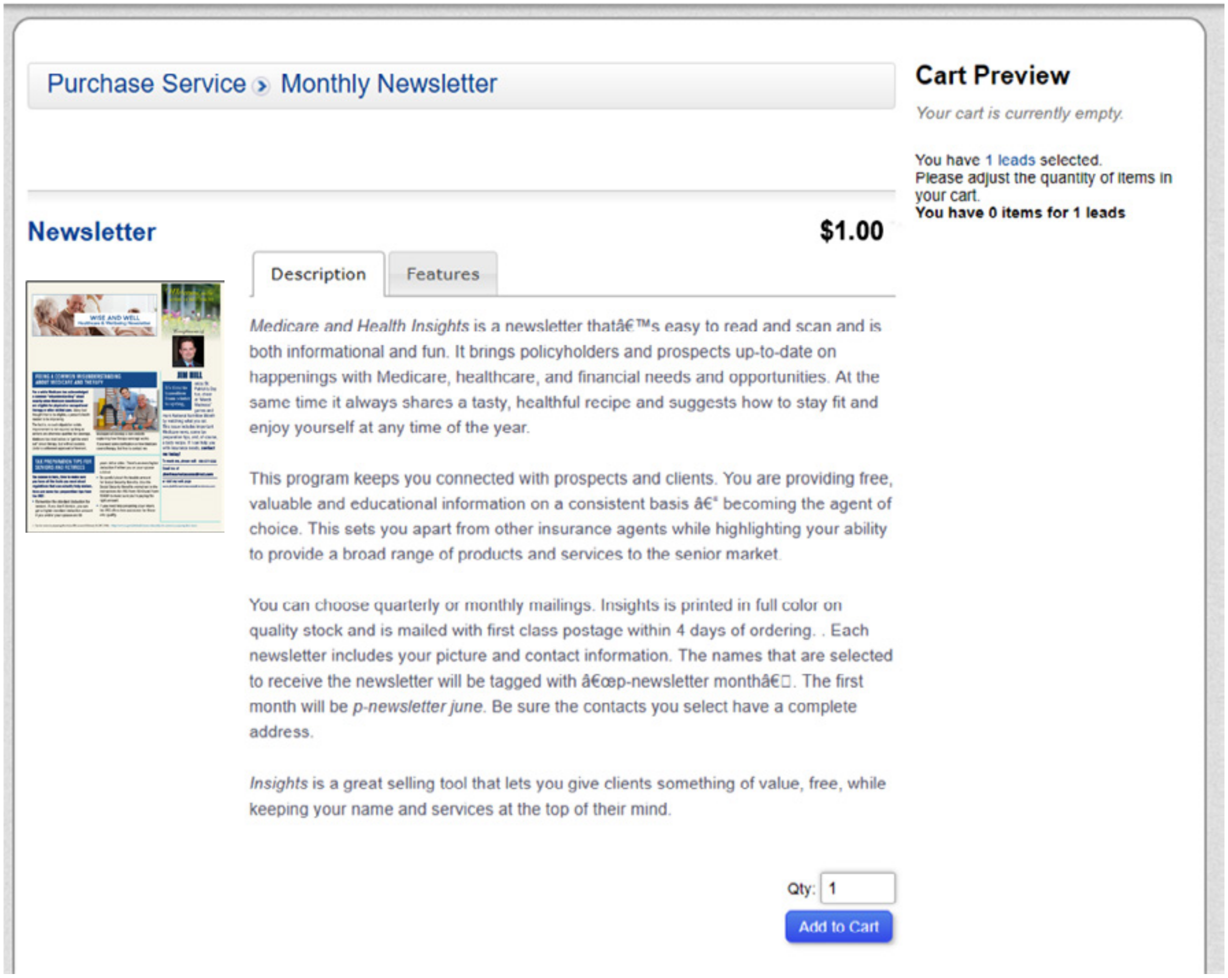
To order paper newsletters check the boxes for the people you want to have the newsletters mailed to. Then click "Purchase Service" button under Actions for Selected.



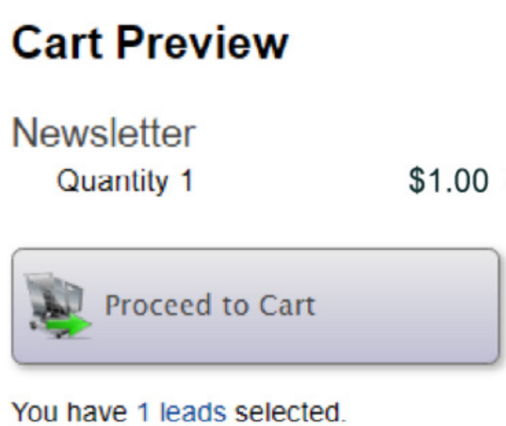
Then select the "Monthly Newsletter" Option.



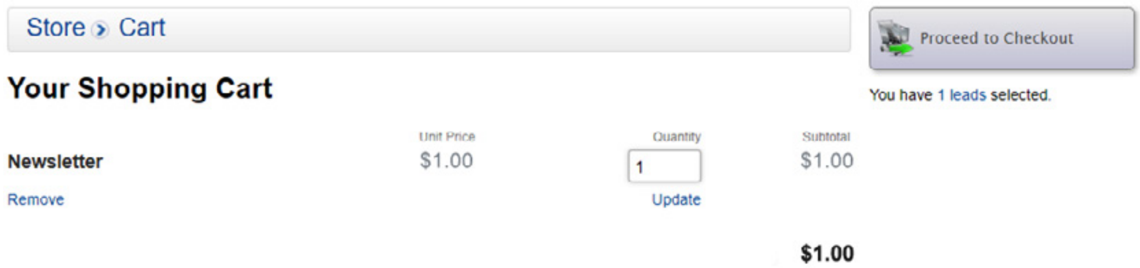
Next press the “add to cart” option at the bottom of the page.



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



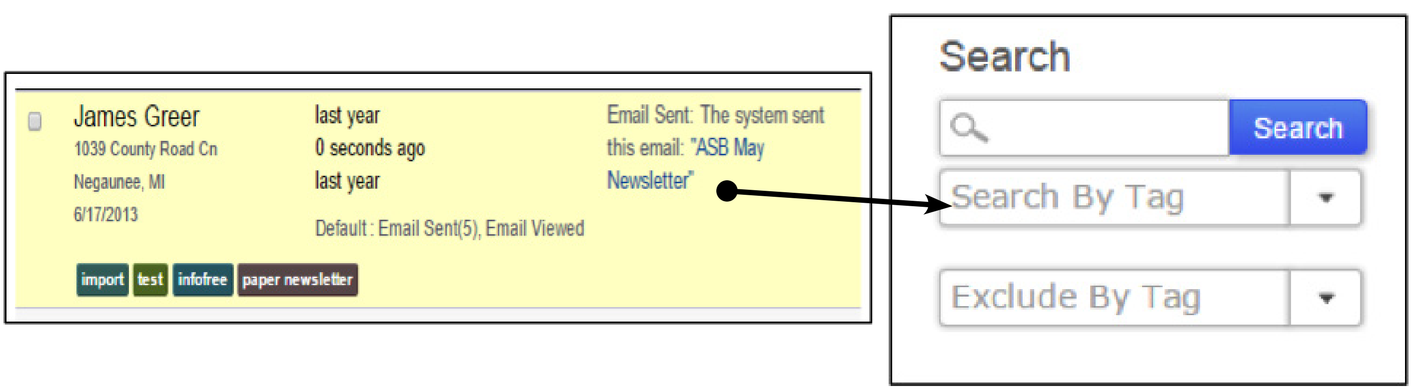
Click Proceed to Checkout to be taken to the payment screen to complete your purchase.



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.



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