

Group Benefits – Scripts - CCAC Marketing

(Courtesy of LegalShield)

Smart Solutions Magazine - Decision Maker Script

Hello my name is...

I'm a Sales Agent with CCAC Marketing.

I would like to leave a magazine for you (the decision maker) to show how our benefit can help both your company and your employees.

I would like your opinion, so please take a few minutes to review this and I will check back with you in a few days.

Smart Solutions Magazine - Gate Keeper Script

Hello my name is...

I'm a Sales Agent with CCAC Marketing.

I would like to leave you a magazine for the decision maker. This will show how our benefit will help both the company and the employees.

I would like his/her opinion, so may I get his/her contact information so I can check back with them in a few days?



Smart Solutions Magazine - Follow-up Script

Mr. Decision Maker:

This is _____. I'm checking back with you to get your opinion regarding the magazine I left with you.



(If group is in same industry as one of those in the magazine)

Have you had a chance to review the article regarding *(insert name of group or industry)*?

I'm sure you can see from the different perspectives presented in the magazine the value of our products to you as the employer and your employees.

(Wait for response)

I'm going to be in your area next _____. What would be a good time to come by and visit with you for only fifteen minutes

Rob Vest Script

One of the most important things to do at the enrollment is to get the company's personnel introducing you to encourage the employees to sign up at the enrollment. They should also remind them that they have until the next payroll period to cancel the membership before any payment is made. If the employees leave without filling out the application it is unlikely they will bring it back. Remind the company representative that it helps the company if a lot of people sign up because they will have less legal and identity theft distractions in their workforce which will potentially increase the bottom line.

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Sample Introduction:

Our management team looked at this benefit and strongly believes it will provide great value to you and your family. At [company name here], we are always looking for the best benefits in the market place that can help both our employees and our company. We believe this benefit will provide you peace of mind and save you money. At the very least you should sign up to get the Will and credit report - that alone saves you the cost of the plan for a year.

As we all know, lawyers are expensive and most of us can't afford the legal system. Simply put, if you can't afford your rights you have none. This benefit provides full access to quality lawyers, locally and nationwide, for pennies a day. Some of the legal issues provided are Will preparation, letters and phone calls made on your behalf, contract reviews, phone consultation on an unlimited number of matters and much more.

Also included is a program to help fight and discover identity theft. Unlike most identity theft programs this benefit covers all types of identity theft, not just credit. You will receive a credit report and score as a part of your paid membership. Just having access to this information and the legal service plan gives you the information and resources necessary to clean negative items off your credit report which generally results in an improved credit score.

If you are interested PLEASE sign up when [Associate] is done speaking. There is no risk. Your first deduction will not start until next pay period so if you change your mind after signing up just let me know and I will not do any deductions even if you use it this week.

Bottom line - you get a Will, Living Will and a credit report with your paid membership just for signing up.

Calling Insurance, Benefit and Investment Professionals Tony Petrill

Hi. I'm _____, the Pre-Paid Legal Marketing Agent in your area. We work with a lot of professionals like you and we are getting the word out that Pre-Paid Legal is being featured in a documentary on national TV this month. The President of the US Chamber of Commerce states "we're a great example of entrepreneurial success" in the short documentary. I would like to swing by and tell you more about what we are doing with 1.5 million existing members and over 30,000 corporate clients. Do you have 15 minutes on Tuesday or Wednesday to look at our plans and our commissions?

If they ask for more info: The word is getting out! A documentary on national TV and we launched a new program at no cost to our corporate accounts. Pre-Paid Legal and Identity Theft Shield is truly on the cutting edge. I just wanted to stop by and visit with you to show you how our plan would work for you and your clients and show you the commissions. Do you have 15 minutes this week to meet?

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(Courtesy of LegalShield)

If they still ask for more info: If you don't tell your clients about Pre-Paid Legal, then someone else will and get their foot in the door. I just wanted to stop by, shake your hand and show you why thousands of insurance professionals, benefit brokers and financial planners are now marketing our plans. Can I swing by to show you how our plans would work for you and your clients and show you the commissions? Do you have 15 minutes this week to meet?

Inviting to Lunch/Breakfast: I'm _____. We work with a lot of professionals like you. Have you heard of our new plan Identity Theft Shield? It's one of the fastest growing employee benefits in North America and we're already in over 30,000 companies. We are having a lunch/breakfast this week to go over how our plan would work for you and your clients and of course, go over the commissions. Can I put you down to attend? If not I'd love to take you to lunch or meet at your office for 15 minutes to go over our plans and the commissions. Is Tuesday or Wednesday good?

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If You Were My Attorney

The "If You Were My Attorney" story is a very effective way of getting others to think about what it really means to have access to lawyers for a low monthly rate. It is a great way to open a conversation with one of your contacts or other prospects

If You Were My Attorney

I would like you to consider yourself an attorney for a minute. How much do attorneys charge per hour? \$150 to several hundred dollars? Just for example, consider yourself a \$100 per hour attorney.

I come to you and tell you I'm married and have two children, including a teenage driver.

What I would like to do is work out a flat monthly fee with you to provide legal services for me, my spouse, and my children. I'm going to outline some needs we have. As I go through these needs, I want you to add them up at \$100 per hour. Then I want you to tell me how much you would have to charge each month for all these services.

First, I would want to be able to pick up the phone and talk with you about any legal matters, personal or business. Of course I will call only during your regular business hours.

Plus, when we need anything of a personal legal nature such as a letter written, a phone call made, or a contract reviewed, we would want you to do that for us too.

I would also like for you to draft my Will. Then each year, I would like you to review and update it for me if needed.

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I want to have this access throughout the United States/Canada. If I'm traveling in another state/province and need legal advice, I expect you to refer me to an attorney in that state. I want that attorney to bill you, and I want you to pay that bill out of this monthly fee arrangement we set up.

Now, if you were my attorney, what flat monthly fee would you charge me for all these services?

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Important Information for Agent with LegalShield memberships:

This is just a reminder for everyone participating in the LegalShield benefit program. Please be sure and use the service to get your Will completed. Remember there are no extra charges for getting your Will done. By getting your Will completed you and your family will have security and peace of mind. The value of the Will alone is equal to a year or more of your benefit. Also as a member of LegalShield there is a great website you can use to get documents and questions answered 24 hours a day. Just go to www.prepaidlegal.com and utilize the free legal information available there. This also is included in your monthly service. If you did not sign up for this valuable family benefit and would like to do so please see me for an application. Remember, you now access to quality legal services when you need them, use them to your advantage!

Tips to encourage participation

Making the Appointment

Mike Schwartz

First--you must be talking to the owner or the decision maker of the company. I then introduce myself and always address the person whom I am talking to by name. Then I say:

We have a program that may reduce absenteeism, reduce stress on the job, make your employees more productive and increase your bottom line--and it doesn't have to cost you or your company anything!!!

I will be in your area on Monday & Tuesday{whatever days you select--just give them a positive choice}, which day is better?

AM or PM which is better?{positive choice}, 9AM or 11AM, which is better?

Great, I look forward to seeing you on--day, date, time., always repeat it back to them. Then-GET OFF THE PHONE !!

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Setting the Appointment

Mark A. Seguin

Hello..... this is Mark Seguin how are you doing today?

The reason for my call is my company provides a very unique employee benefit to "XYZ company" the benefit provides each employee with a will for them and their

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(Courtesy of LegalShield)

spouse as well as many other great benefits and it's..... at no cost to YOU or your COMPANY and I thought you might want to offer it to your employees.

I would like to drop off some information and visit with you for 7 or 8 minutes. What's better for you Tuesday or Thursday? (Act like you are in a hurry and you know they are very busy. Get off the phone as fast as you can and try not to let them ask questions.)

I have found this script to work really well for me.

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Appointment Setting

Doug Kleinsmith's Group Script

Hi is this _____. This is _____ Marketing Agent with Pre-Paid Legal Benefits. I understand that you don't currently have a legal plan and/or Identity Theft Protection plan in your benefits package.

What I'd like to do is simply drop off some information and get 15 minutes or so to visit with you and show you why so many companies like yours are bringing these benefits in.

When would you have just 10-15 minutes to stop by and see you?

(set the appt. / confirm and don't take more than the allotted time)

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Phone Script for Calling a Potential Group

Doug Roberts, GVP of Illinois

Doug Roberts discusses his standard procedure for approaching potential groups, which has proven to be successful for him.

1. Start with small groups. Don't start calling companies until you have 30 or 40 because you are less likely to be discouraged when a company is not interested. Then you can proceed to the next company on your list.
2. Call the main number and ask, "Who is in charge of handling your benefits?" Build a relationship by gathering information from the gatekeeper, such as their name and the name of the benefits person. Make a note in your contact file along with other information about the company.
3. When you call back, ask for that benefits person and introduce yourself. **"My name is _____, Sales Agent with CCAC Marketing, I'm an employee benefits consultant who works with a lot of companies like yours."** 'Have you heard of our admin company, LegalShield employee benefits? (Doesn't matter what the answer is) Would it be okay if I came by for 10 to 15 minutes to share with you what LegalShield is doing for companies like yours and also what HR magazines have to say about our Company? In a few minutes

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I can do that, Mr. Smith. Would next Wednesday or Thursday be better for you?' (wait for response) Would the morning or afternoon be better?' Set appointment.

Objections:

1. *Not Interested* : "Mr. Smith, what was it that did not interest you when you previously looked at legal plans?"
2. *Request mail out information*: "Just out of courtesy, within 10 to 15 minutes I can share with you what LegalShield is doing for companies like yours and also what HR magazines have to say about our Company?" (See #3 above)
3. *Cannot get the appointment*: "Would it be okay to keep you up-to-date with current information about your industry?" (Make note to contact again 30, 60 or 90 days)

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Saving Lost Time in the Workplace

Mark Brown, Sr. Vice President/Chief Marketing Officer

Talking to the Business Owner, HR Director, Decision Maker

Mark receives his leads from a warm market, such as other companies or other associates. When visiting with the Decision Maker, Mark uses the following script about saving lost time in the workplace that can also be used as a lead in script for the plan benefits and Identity Theft Shield.

Mark's Script for Saving Lost Time in the Workplace

"Why are people absent from the workplace, Fred? Is it because they are always sick? When I think back to my printing business, for instance, employees seemed to be absent more often for personal problems than for sickness. Fred, if your key employees came down with a serious illness, would you think it would cost your company money? For example, should one of your employees have a problem with ID theft, it would be the same as a serious illness to them. It would probably require that they take a lot of time off work to convalesce, fix the problem, and to make it work. I have a product, which will help them by monitoring and restoring their credit while reestablishing their well-being. If I can show your employees the great service that our plan would provide, would you let me share this with them?"

"We now live in the most complicated society in the world, which has gone from the Ten Commandments to the tax code. Most personal problems in the workplace have now become legal related in some fashion. That's how complicated life has become. They can now access the legal system from their office or home. Our legal plans also provide the ability to head off small problems before they become larger ones. Fred, when I get in front of your employees I will not just be selling to them, but showing them how to use the plan."

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(Courtesy of LegalShield)

Kelly Timmons

Good Morning,

My name is Kelly Timmons and I am a Sales Agent from CCAC Marketing. I am very excited to be here today to share with you two new employee benefits that may take effect for you today. Is anyone familiar with our admin company, LegalShield or the concept of a legal plan?

Legal Shield has been in business over 39 years and are pioneers in this industry. The purpose of a legal plan is to allow you and your family to have access to the legal system in an easy and affordable way. If you stop and think about it for a moment, who uses the legal system in this country? The top wealthiest 10% and the poorest 10% who get government aid from the state. Where does that leave the rest of us? 80% percent of us, middle America, unfortunately do not have that same access to the legal system because the cost of an attorney in this country averages \$200.00 an hour. So, basically we are only able to get access to as much legal help as we can afford to pay. The problem with that is that we do not have access to our rights and if we don't know our rights, we don't have any. LegalShield is changing that, revolutionizing the legal industry by opening the doors to the legal system so everyone can now have access to their rights and get the help they need without worrying about the cost. We are creating true equal access to justice in this country, one member at a time.

Wilburn Smith ***National Marketing Director***

"The way we do business is through referrals, could you give me the names of 4 or 5 good people like yourself that might need our service?"

Script for Servicing Existing Group Accounts ***Wilburn Smith, National Marketing Director***

(This is a suggested script - your specific situation may require modification of course.)

HELLO-MY NAME IS _____, WITH CCAC MARKETING. Our Admin company is LegalShield. I'M HERE TO SERVICE YOUR ACCOUNT. I'M HERE FOR THREE REASONS.

#1. I WANT TO RE-EXPLAIN THE SERVICES TO THOSE THAT HAVE IT, SO THEY WON'T FORGET HOW TO USE IT.

#2. YOU MAY HAVE EMPLOYEES THAT HAVEN'T HEARD A PRESENTATION AT ALL.

#3. WE MAY HAVE NEW BENEFITS THAT YOUR EMPLOYEES AREN'T AWARE OF. EXAMPLE (NOW WE COVER DEPENDENTS ON IDT) OR THE LEGAL SHIELD BENEFIT THAT GIVES YOU ACCESS TO THE PROVIDER ATTORNEY LAW FIRM 24 HOURS A DAY, SEVEN DAYS A WEEK FOR EMERGENCIES.

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WHEN WOULD BE A GOOD TIME TO DO THAT? IT WILL ONLY TAKE 15-20 MINUTES.

NOTE: IF YOU RUN INTO ROADBLOCKS, YOU MAY HAVE TO HELP THE PERSON IN CHARGE TO MAKE A DECISION. IF THEY SAY, "THERE IS NO GOOD TIME," YOU SHOULD RESPECTFULLY OFFER HELPFUL OPTIONS. HERE ARE A FEW SUGGESTIONS:

#1. DO YOU HAVE REGULAR SCHEDULED EMPLOYEE MEETINGS? ALMOST EVERY COMPANY HAS REGULAR SCHEDULED EMPLOYEE MEETINGS.

#2. I COULD COME EARLY AND BRING DONUTS BEFORE THEY BEGIN WORK.

#3. I COULD BE HERE AT LUNCH TIME AND BRING PIZZA OR SANDWICHES.

#4. I COULD BE AVAILABLE DURING THEIR BREAK TIME. IT ONLY TAKES 15-20 MINUTES.

#5. I USED TO BE IN BUSINESS AND THERE IS ONE THING I UNDERSTAND, YOUR EMPLOYEES TIME EQUALS PRODUCTION AND PRODUCTION EQUALS PROFIT TO YOUR COMPANY. I PROMISE I WILL NOT ABUSE MY TIME. AGAIN IT ONLY TAKES 15-20 MINUTES.

Important notes from: Wilburn Smith, National Marketing Director:

I USED THIS SCRIPT FOR YEARS. IT GOT ME INTO 97% OF THE ACCOUNTS I WAS SERVICING. LET ME KNOW IF IT WORKS FOR YOU.

Follow up with a lead:

"A friend of yours and member of ours sent me by to see you. Only takes 10 minutes to show it to you. Where can we sit down?"

Tips on Getting Referrals and Goal Setting

*YOU MAY NOT REALIZE IT, BUT **RIGHT NOW IS THE TIME** TO BE WRITING A LOT OF GROUP BUSINESS FOR CCAC MARKETING'S administrative company. **WHY IS THIS?** BECAUSE OF THE CURRENT ECONOMIC CONDITIONS, EMPLOYEES HAVE A LOT OF PROBLEMS OUR MEMBERSHIPS CAN HELP WITH.*

*I HAVE RECENTLY TALKED TO SOME OF OUR TOP PRODUCERS LIKE DAVE PAPERNO, ROB VEST AND BILL STOVALL. **THEY HAVE HIGH PRODUCTION NUMBERS BECAUSE THEY ARE ESTABLISHING NEW ACCOUNTS.** EXISTING ACCOUNTS NEED TO BE SERVICED BUT EVERYONE KNOWS YOU WRITE THE MOST MEMBERSHIPS (A HIGHER PERCENTAGE) WHEN YOU OPEN A NEW ACCOUNT.*

HOW DO YOU GET NEW ACCOUNTS?

YOU NEED LEADS SO YOU CAN GIVE A PRESENTATION TO A BUSINESS OWNER OR HR DIRECTOR TO CONVINCING THEM THAT WE HAVE BENEFITS THAT WILL HELP

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(Courtesy of LegalShield)

THEIR EMPLOYEES WHEN THEY HAVE A LEGAL PROBLEM OR IDENTITY THEFT PROBLEM, TO KEEP THEM FROM HAVING TO TAKE OFF WORK TO DEAL WITH THE PROBLEM WHICH RESULTS IN LOSS OF PRODUCTIVITY FROM THE EMPLOYEE THAT EFFECTS PROFITS FOR THE COMPANY.

HOW DO YOU GET THESE LEADS?

IF YOU ARE A NEW ASSOCIATE, YOU APPROACH YOUR WARM MARKET, PEOPLE YOU ALREADY KNOW AND SAY TO THEM:

"THE WAY I DO BUSINESS IS THROUGH REFERRALS. WHO DO YOU KNOW OR COULD YOU GIVE ME THE NAMES OF FOUR OR FIVE BUSINESS OWNERS THAT HAVE FIVE OR MORE EMPLOYEES?"

AFTER YOU GET THE LEAD, THE NEXT STEP IS TO FOLLOW UP.

YOU APPROACH THESE EMPLOYERS BY SAYING "HELLO, MY NAME IS WILBURN SMITH, JOE BROWN SENT ME BY TO SEE YOU". THE OWNER MAY ASK "WHAT IS THIS ABOUT?" AND YOUR ANSWER IS "IT WILL ONLY TAKE ME TEN MINUTES TO SHOW IT TO YOU. WHERE CAN WE SIT DOWN?" THEN YOU GIVE A PRESENTATION ON THE SERVICES.

THEN THE CYCLE CONTINUES...

WHETHER YOU GET A NEW ACCOUNT OR NOT, BEFORE YOU LEAVE, YOU SAY, "THE WAY I DO BUSINESS IS THROUGH REFERRALS, COULD YOU GIVE ME THE NAMES OF FOUR OR FIVE BUSINESS OWNERS WITH FIVE OR MORE EMPLOYEES?"

IF YOU HAVE EXISTING ACCOUNTS, YOU HAVE A HEAD START!

FOR GROUP ASSOCIATES THAT ALREADY HAVE ESTABLISHED GROUP ACCOUNTS, YOU NEED TO REVISIT THE KEY PERSON THERE TO GET NEW LEADS. YOU CAN SAY "I REALLY APPRECIATE YOUR BUSINESS AND BEING ONE OF MY VALUED GROUP ACCOUNTS. I NEED YOUR HELP." (MOST PEOPLE LIKE TO OFFER HELP IF YOU ASK.) WHAT OTHER BUSINESSES DO YOU KNOW THAT I COULD CALL ON TO ESTABLISH NEW PRE-PAID LEGAL ACCOUNTS? DO YOU DO BUSINESS WITH OTHER COMPANIES THAT HAVE FIVE OR MORE EMPLOYEES?"

PHYSICAL LOCATION CAN BRING YOU NEW BUSINESS AS WELL:

*"COULD YOU GIVE ME A CONTACT PERSON ON THE BUSINESS NEXT DOOR ON THE RIGHT AND THE LEFT AND ACROSS THE STREET?" THEY USUALLY KNOW THESE BUSINESS OWNERS AROUND THEM. **THIS IS CALLED THE T-SYSTEM.***

ANOTHER PLACE TO GET LEADS IS WHERE YOU DO BUSINESS.

I'VE ALWAYS HAD THE ATTITUDE THAT ANYWHERE I SPEND MONEY; THEY ARE GOING TO KNOW ABOUT PRE-PAID LEGAL. I'M NOT TALKING ABOUT WAL-MART AND AT&T, BUT SMALLER BUSINESSES LIKE MY CLEANERS, DENTIST, DOCTORS, CLOTHING STORE, CITY GOVERNMENT, ETC.

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(Courtesy of LegalShield)

MY GOAL FOR GROUP MARKETING ALONG WITH MR. STONECIPHER, RANDY HARP, MARK BROWN AND KEITH DAVIS IS TO DOUBLE GROUP MARKETING SALES IN THE NEAR FUTURE AND TRIPLE SALES BY YEAR END.

TO DO THIS, EVERYONE NEEDS TO SET PRODUCTION GOALS.

- **FIRST GOAL SHOULD BE TO AVERAGE 25 SALES PER WEEK.**
- **SECOND, WHEN YOU HIT THAT GOAL, YOUR NEW GOAL IS TO AVERAGE 50 SALES PER WEEK.**
- **THEN WHEN YOU HIT THAT GOAL RAISE IT TO 75 SALES PER WEEK.**
- **WHEN YOU HIT THAT GOAL RAISE IT TO 100 SALES PER WEEK.**

CAN THIS BE DONE?

IT HAS ALREADY BEEN DONE BY ASSOCIATES IN PRE-PAID LEGAL.

WHEN I STARTED AT PRE-PAID LEGAL THESE WERE THE GOALS I LEARNED. THAT'S WHY I WAS AVERAGING 78 SALES PER WEEK - AT A TIME WHEN WE DIDN'T HAVE DOUBLE COUNTERS! **WHAT KIND OF INCOME WOULD THIS CREATE FOR YOU?**