



FIVE RULES OF THE ROAD

To help you navigate the road to success, we constantly evaluate what works and doesn't work. The following items are critical elements for you to keep in mind. Keep these keys in mind as you start your journey into the world of preneed sales. Any one of these has the potential to derail your success.



NO DIRECT BILLING: Unfortunately, we will not accept direct billing under any circumstances. If a prospect does not have an account that can be drafted or a credit card they can use, we will not be able to help them.

LIMIT TELESALLES: Telesales is when you call a purchased lead on the phone or virtually via a "live transfer" or some other automated process. Calls or virtual meetings (such as Zoom) with existing clients and personally developed prospects are not considered to be telesales. It is preferred to limit telesales to 25% of your prospecting activity. Typically, the persistency of telesales falls below acceptable levels. Meet face-to-face with prospects whenever possible.



AGENT AS PAYOR POLICIES ARE LIMITED: Agents may be the payor on two policies only. *Pro Tip:* It is always best to pay annually--it costs less and reduces the risk of lapsing.

HIRING AGENTS ARE LIMITED TO CONTRACTING EQUIVALENT TO THEIR NUMBER OF PRODUCING AGENTS: Any agent who has the ability to hire is permitted to submit for contracting new agents up to the number of their producing agents.

For Example: You submit five agents for contracting this month. Once they are contracted, only three produce. Next month, you may only submit three new agents for contracting, and so on. In other words, there is a 1-to-1 relationship between the number of producing agents in your upline and the number of new agents you may submit. If agents remain dormant (non-producing) for 60 days after hire, their contract will terminate.



PROVIDE TRAINING AND ACCESS TO RESOURCES TO YOUR AGENTS: It is our job to train agents and lead them to the resources they need to succeed. Within 90 days of hire, you should guide each agent to use the tools for free legal documents (Wills, Advance Directives, Power of Attorney), the Funeralwise back office (including the planner), and our lead programs.

Not taking advantage of the tools available will weigh heavily in continuing the agent's contract if persistency falls below 80%. If the agent is using the tools available, they are more likely to be given the benefit of the doubt should there be a hiccup or downturn in business.