



To Whom It May Concern:

First and foremost I would like to thank you for choosing Legacy Life Insurance Agency as your lead generation provider. We understand that there are many companies out there producing quality leads, and we like to think that we stand apart because of the thorough processes that we have employed in the screening of our leads. Please continue to *our tips* below which outline the best practices in closing our leads and providing the highest ROI.

1. Remember that the people we are providing as leads *do not* know you by name, or your company. All they know (and even sometimes they forget) is that they took a survey/ call and they have requested more information about your particular service or product.
2. DO NOT CALL ASKING FOR PEOPLE BY THEIR LAST NAME. We all want to be professional business people, but with these leads *you cannot overdo it*. Try asking for someone by their first name as if you know them. THIS WILL GO A LONG WAY.
3. DO NOT LEAVE MESSAGES ON ANSWERING MACHINES! – do not waste your time leaving messages unless you have already built a rapport. Countless clients have wasted their time doing this and it has been proven not to work.
4. Pay attention to the time stamp on the lead. It is when we produced the lead and if you are having a hard time reaching them you can always use the time stamp as a reference point to when is the best time to contact them.
5. Last but not least – Remember that all of the leads we send to you have done 5 things:
 - A. The person on the lead sheet received and answered a call
 - B. The person answering the call said hello and listened to an introduction
 - C. This person was then provided a choice to *press 1* and hear more or *press 2* to end the call and immediately be added to the DO NOT CALL LIST
 - D. The person pressed the 1 key and heard more about how great and low costing the service is and why they should want it.
 - E. Lastly, the person left a recorded message stating their interest with all of their information which we have provided you with on the inside of the lead sheet.



Furthermore – Every lead we receive has had a reverse lookup done on the name and address to verify as much information as possible.

If you have any questions please feel free to contact me at any time and I will do whatever I can to help ensure a smooth running campaign.

Legacy Life Insurance Agency

Beau Zelmer

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