

Protective 



LIFE LEAD MANAGEMENT

Protective refers to Protective Life Insurance Company and Protective Life and Annuity Insurance Company.
For Financial Professional Use Only. Not for Use With Consumers.



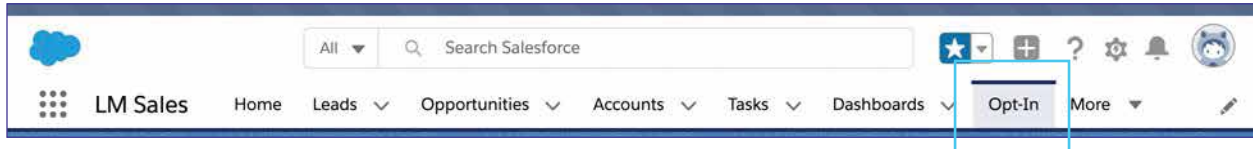
If you're not contacting your life leads from the Lead Management Tool, you're leaving a lot of business on the table. These leads are generated from specific household criteria such as income and liability coverage that indicates a prospect's receptiveness to purchasing life insurance. And because they come from your book of business, you already know each other. This existing relationship makes prospects even more receptive to learning about other products.

How do I get my high conversion life leads?

Use your web browser (Google Chrome or Microsoft Edge) to access your Comparison CRM:
https://lmsales.lightning.force.com/lightning/n/ST_Record_List

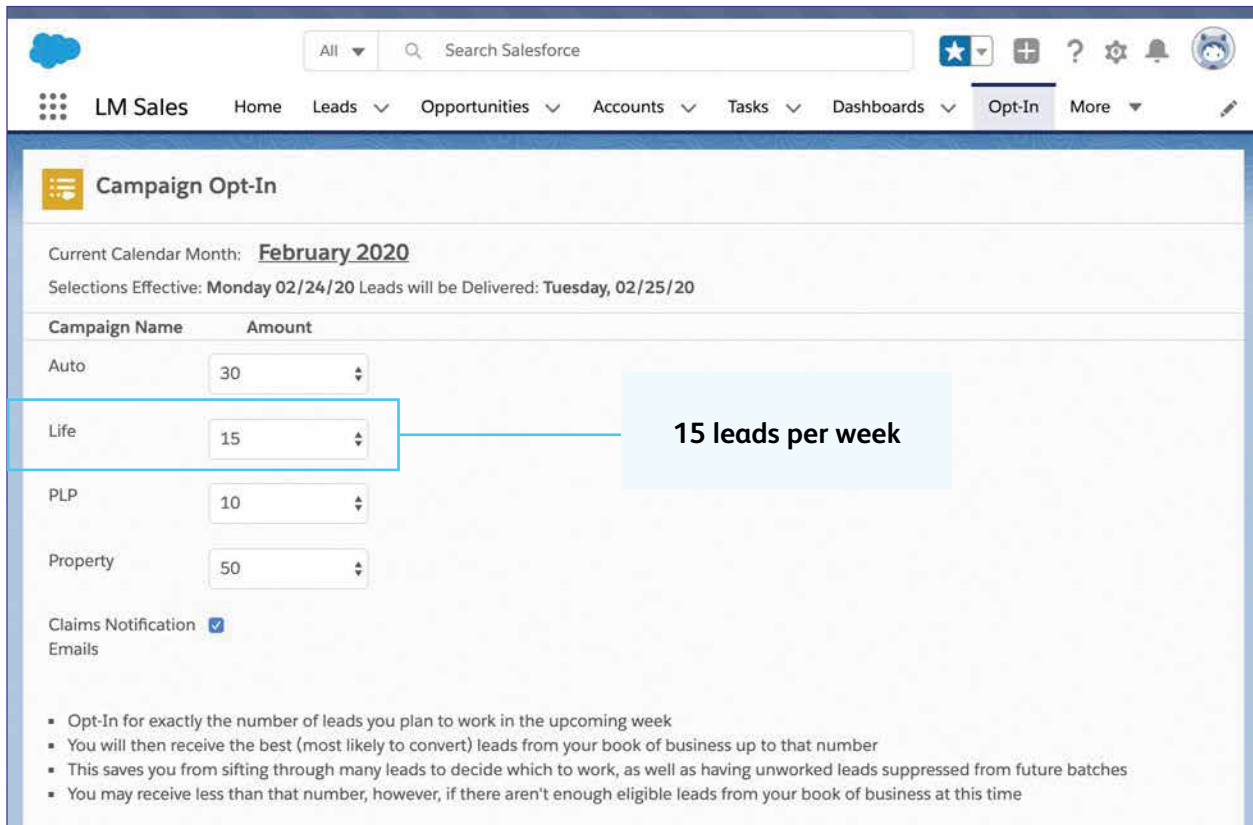
A one-time setup in just two clicks!

1. Go to the 'Next Best Lead Opt-In' tab.



2. Next to 'Life' select how many new high conversion life leads you want to receive each week.

- We suggest starting at 15 leads per week.
- These leads will be delivered every Tuesday.



So I have my life leads, now what?

Make the most of these opportunities. Set aside time every Tuesday to work the leads and contact your new batch of prospects.

- Go to the 'Sales Tracker' tab.
- On the left-hand side under 'Product,' select 'Life.' This will show you your 'Next Best Life Leads,' life service leads and life internet leads.
- On the left-hand side, under 'Campaign,' select 'Cross-Sell' to only see your 'Next Best Life Leads.'
- The 'Next Best Life Leads' you opted in to will be delivered every Tuesday. Life service and life internet leads will be delivered in real time.
- To update a lead's status, click 'Edit' to make changes and set follow-up dates.

The screenshot displays the 'Sales Tracker' interface in the LM Sales system. The main area shows a table of 'My Open Opportunities' with columns for Created Date, Name, Follow-up Date, Stage, Product, City, and State. The 'JESSICA BUZZELL' entry is highlighted. The left sidebar contains filters for Stage, Campaign (with 'Cross-Sell' selected), and Product (with 'Life' selected). The right sidebar shows a detailed view for 'JESSICA BUZZELL', including contact information, campaign type (CROSS-SELL), and related opportunities.

| Created Date | Name | Follow-up Date | Stage | Product | City | State | Edit |
|--------------|------------------|----------------|-------|---------|------------|-------|------|
| Mar 30, 2020 | FRAN BABY | | New | Life | WALTHAM | MA | |
| Mar 30, 2020 | WYTHEW GAURGHARD | | New | Life | MIDDLETON | VT | |
| Mar 30, 2020 | KIMSCOFY ROCKS | | New | Life | GORHAM | ME | |
| Mar 30, 2020 | WENDY STRAMER | | New | Life | GRIFFIN | GA | |
| Mar 30, 2020 | LEILA LAMITOLA | | New | Life | ROCKMART | GA | |
| Mar 30, 2020 | JOE PHAM | | New | Life | MEDFORD | MA | |
| Mar 30, 2020 | VICTOR RODRIGUEZ | | New | Life | GATESVILLE | TX | |
| Mar 30, 2020 | JESSICA BUZZELL | | New | Life | WESTVINGO | LA | |
| Mar 30, 2020 | ANDY ROMERO | | Quote | Life | LENCOR | NC | |
| Mar 30, 2020 | LORBEITH SMITH | | New | Life | MATAMORAN | TJ | |
| Mar 30, 2020 | MATT TENNEY | | New | Life | CENTENNIAL | CO | |
| Mar 30, 2020 | DAN MORRIS | | New | Life | WANTED | NC | |
| Mar 30, 2020 | JIM HIGGINS | | New | Life | ALDIANDREA | NH | |
| Mar 30, 2020 | WFFY ANSARA | | New | Life | JAMAICA | NY | |
| Mar 30, 2020 | JESSICA ALLEN | | New | Life | ALBANY | NV | |

Tips for contacting your leads

When connecting with customers, remember to reintroduce yourself and offer to review existing coverage before asking about the life insurance opportunity.

For example:



Addressing concerns



“I already have life insurance through work.”

Acknowledge

“It’s great that you are offered life insurance through your employer and that you are taking advantage of it.”

Express empathy

“I take advantage of the great benefits at my work as well.”

Ask clarifying question

“What coverage do you have?”



“Let me think about it.”

Acknowledge

“It’s important to think through financial decisions like this.”

Express empathy

“I always give careful consideration to financial decisions that impact my family.”

Ask clarifying question

“What specifically are you considering about this protection for your family?”



We're here to help you follow and repeat these steps to meet more clients' financial needs. Visit comparison.protective.com or contact your Protective representative for support along the way.



protective.com

Protective® is a registered trademark of Protective Life Insurance Company. The Protective trademarks, logos and service marks are property of Protective Life Insurance Company and are protected by copyright, trademark and/or other proprietary rights and laws.

Protective is a registered trademark of Protective Life Insurance Company. Protective Life refers to Protective Life Insurance Company (PLICO) and its affiliates, including Protective Life and Annuity Insurance Company (PLAIC). PLICO is located in Nashville, TN, and PLAIC is located in Birmingham, AL.

| | | |
|--|-------------------------------------|----------------|
| Not FDIC/NCUA Insured | Not Bank or Credit Union Guaranteed | Not a Deposit |
| Not Insured By Any Federal Government Agency | | May Lose Value |

CLABD.1457270 (05.23)

For Financial Professional Use Only. Not for Use With Consumers.