Step 6

Step 6a: Leads
After you've completed Step1x, you will be given your first set of leads. These leads are paid so treat these leads as if it cost you. It is very important that you WORK THE LEADS as you will have to complete Step6bWeeklyStatusReport on a Daily Basis then submit at the end of every week when it's due. You'll read more about this is Step2b.

No one wants to waste money. Our Licensed Insurance Broker is spending her money paying for these leads believing in you to work them meaning you must call the leads EVERYDAY:

- If there's no answer, leave a message and call again later that day, the next day and then the next day, so forth & so forth

- Call back everyday until you get a hold of someone

We will start you with 10 leads.

- If the number is disconnected, the lead will be replaced with another lead

- If the lead is the wrong number, it will be replaced with another lead

About the Leads:
Each Client received some documentation in the mail in regards to Mortgage Protection Insurance. Included in the documentation was a for to fill out and return back if they were interested. They must include their full name, address, social security number, date of birth, health, age, if they smoke or not, etc. Very important information each Client completed on the form along with the date and their signature. Each Client then mailed it back to the company; the company then sold the leads to companies like PhoneOps.

This is a really good indication that the Client is highly interested in Mortgage Protection Insurance. The lead that you have is the actual form that each Client completed and mailed back to the company. Most of the Clients you will call already had someone that came to them and quoted them on Mortgage Protection Insurance and most likely received a very high quote that they probably can't afford and that is why their information is still in our system.

You will call each Client back and encourage them to sign up with you. Why?

Step 6a - Continues

Because you are not convincing the Client to sign up on the very high quote that was already offered, you are going to lock them in a monthly payment **THAT DAY** based on what they can afford *(Monthly Range, Example: Range of $100-$125)*. This is a new way for insurance and each Client will be so excited that you called.

Updating the Leads:
You must use the software in Step11 to convert each lead from PDF to Paint in order to edit the lead as you have to include the Lead Status on the top page of the lead. Each lead must have the Lead Status such as Number Disconnected, Called but the person no longer lives there, etc. on it so we'll know the status of each lead.

NOTE: You are only putting your comments on the lead if it's a bad lead and you are replacing the lead for a new lead.

Here's what to do when you are ready to include the Lead Status to each lead:

- After downloading the software in Step11, open it
- Click Add File(s) and find the lead you want to include
- In the Output Format section, click Select other format and select Image (JPEG)
- In the Output File section, click Select another folder to store all documents. It's up to you where you want your documents to store at when you are finish
- Click Convert, Ok and Open File
- Once the file opens in JPEG, right-click it, hover over Open With then click on Paint
- Depending on your computer, you may have to make the document smaller so you'll click on View, Zoom Out then click on Home. If you don't have to, you can skip this step
- Now you can edit this document. If you called this lead and the number is disconnected, click on the **A** at the top and on a blank area at the top, make a box to open for notes then put in the box NUMBER DISCONNECTED

Step 6a - Continues

- Click out the box, click Save at the top then go back to the JPEG

- Now you can see that the lead is updated. You can save the lead to your desktop and submit for Submission; you don't have to PDF the lead

Step 6b

Step 6b: Weekly Status Report
Weekly Status Reports are due every Saturdays by 5pm est. We need all reports by this time in order to beat the Deadline. Download Step6bWeeklyStatusReport and save to your computer. You must have Microsoft Excel to open this document.

Completing the Weekly Status Report:
When completing this form, follow these steps: This Example will be Tuesday 7/7/17 and when you open this document, you'll see 2 examples already listed. Once you understand how to edit this document, you can delete the examples.

- When you get your leads, put each of your Clients' names on the form and put the date that you got them in the Date Received Lead column

- Call all your leads that day

- In the first Tuesday Status column, put the date first

- Then include the status of the call - No answer, left a message, the line was busy, I'll call back. Number is disconnected, the lady said that person doesn't live here, etc.

- The words may be outside of the box. Simply adjust the column line over to fit all the words in one box

- Do this for the rest of the leads you have. All the comments should be in the Tuesday Status column for each Client since in this example, you received your leads on Tuesday

- Now the next day is Wednesday, you'll do the same thing for this day but all your comments will be in the Wednesday Status column

Step 6b - Continues

- You'll continue to do this for each day until you get a hold of someone and you accomplish either **1** or **2** above

- When you accomplish 1. Completes an Application with a Client, you will add the notes to the then go over to the number of the row to highlight the entire row then highlight it changing the color TURQUOISE

- When you get a 2. Client states that they are no longer interested or if you get any leads that are Disconnected or Wrong Number, you will add the notes to the Weekly Status Report then go over to the number of the row to highlight the entire row then highlight it changing the color GRAY

Your Weekly Status Report should look like the one you downloaded. Keep it looking the same every time you submit your Weekly Status Report every week.

Step 6c

Step 6c: Grading Period
Grading Periods will be every Saturdays of every week. You will be Graded on all Weekly Status Reports so its very important to always submit your Reports every Saturday at:

www.PhoneOpsFunding.com/IPIAFileSubmission

The Weekly Status Report starts every Monday and ends every Saturday and the 3rd Party Verifying Team spends all Sunday going through them. We keep a record of all leads that were given to you and you must keep your Weekly Status Reports updated with the lead information to match ours. Everyday, you are required to call each lead until you either:

1. Complete an application with the Client **or**

2. The Client states that they are no longer interested

If you don't get either **1** & **2**, you must keep calling. Your Weekly Status Report must show that you are calling each lead everyday throughout the week.

Step 6c - Continues

For all leads that are:

- Disconnected
- Wrong Number
- No longer interested

Our 3rd Party Verifying Team will call each lead to verify before completely deleting the lead out of the nationwide system so make sure the information you are giving us about the lead is 100% accurate.

Compensation Penalties:
As mentioned in Step1, to avoid Compensation Penalties, you must follow the Four Step Process and call your leads EVERYDAY. Here's a list of Compensation Penalties that you can easily avoid:

- For each lead that you do not call in a day in any given week, there will be a deduction of $45 per Client the first week. There after, you will no longer receive free leads

- If you didn't submit your Weekly Status Report before the deadline *(Saturdays by 5pm Eastern Standard Time)*, you will no longer receive free leads

- If our 3rd Party Verifying Team verified that any information that's on your Weekly Status Report is incorrect/inaccurate, you will no longer receive free leads

- If any lead you state the number was wrong but our 3rd Party Verifying Team confirmed that it wasn't, you will no longer receive free leads

- If any lead you state the number was disconnected but our 3rd Party Verifying Team confirmed that it wasn't, you will no longer receive free leads

- If any Client you state that is no longer interested but our 3rd Party Verifying Team confirmed that no one called them or they never spoken to you, you will no longer receive free leads

- If our 3rd Party Verifying Team confirmed that you called the Client for business/services other than PhoneOps Mortgage Protection or PhoneOps Refinance, you will be terminated

Step 6c - Continues

When you are no longer getting free leads, your other options would be to pay for your own leads and/or advertise to generate your own Clients if you still want to work this position. Always make sure that you are honest by making everything that's on your Weekly Status Report accurate & true as our 3rd Party Verifying Team will verify everything.

As a reminder, our License Insurance Broker is spending her money to purchase leads and all you have to do is call the leads. If you:

- Follow the Four Step Process EVERYDAY
- Call the leads EVERYDAY
- And submit your Weekly Status Report every Saturday

you do not have to ever worry about the Compensation Penalties. We do our best to keep a very high Customer Service rating so our 3rd Party Verifying Team will call all your leads to make sure you are doing a good job. Remember to do your best, be honest, call your leads everyday, be persistent to lock your Clients in SAME DAY and keep it professional at all times.

This Completes Step 6