

TOP 12 RETENTION TIPS

Compiled by and from Top LS Associates Throughout N. America

1. **USE THE MEMBERSHIP YOURSELF!** As well as having examples of everyday uses of the service for the new member. Remember: Stories Sell – Fact Tell. Learn more how others have used it by attending the events, hearing testimonials, and following Facebook groups with other Associates.
2. **BANK DRAFT:** If at all possible try to place the membership on a monthly bank draft. With individuals receiving credit card approvals practically daily in the mail they change their cards almost monthly. This leads to higher cancellation rates than with the monthly bank drafts. Explain that service may be interrupted if they choose to pay by credit card and it expires. And NEVER use prepaid debit cards, the average life of those members is only 3 months.
3. **ENROLL IN PERSON** if at all possible. Never sell the plan without some kind of personal contact. The LegalShield plan is extremely unique and the consumer needs to understand the value of the membership. This must be delivered through a presentation that gives the potential member the ability to ask questions.
4. **ENCOURAGE USAGE:** Encourage the preparation of a will even if that means starting them on the Will Questionnaire during the closing of the sale. This initial start will demonstrate to them how simple it is and improve the chance of a member completing the questionnaire. This extra time with the member will come back to you tenfold.
5. **MY LS “App”:** Help them get the app on their phone ASAP! Call your new member in 7-10 days, about the same time they get their kit. Help them with ideas of using their membership. Promote utilization in every manner possible from the preparation of the will, to document review, and letter writing. Help the member to feel comfortable with calling the law firm regardless of the situation.
6. Add-on the Identity Theft Shield, and make sure you have them activate their credit monitoring at www.ShieldActivate.com Members who are getting their monthly report get value even when maybe they haven’t used their membership.
7. **DO NOT OVERSELL!** The value of our membership is incredible! You don’t need to sell a “get out of jail for free” mentality. If anything, **UNDERSELL** the membership, and let the law firms Over-Deliver. If you use third party tools, ie. DVD or web presentation you’ll never oversell. Again, share stories, etc.
8. **DOWNSELL** the membership when appropriate. There’s no need to sell too much product but rather the product that fits his/her needs and his/her income level. While your advanced commissions will be greater based on the membership premium your long term financial gain is based on the retention of the membership.
9. **NO Emergency / 911 / Quick Fix,** type members. We Highly Discouraged Enrolling these type of members. They use it, it works, they cancel because they solved their challenge. They use it and it doesn’t work, they cancel because it didn’t do exactly what they wanted it to do. We’re looking for those that understand the long-term mentality of using it regularly.
10. **USE MAS** (Member Advantage Service). Get your new members email address on file so corporate can communicate, and make sure you sign up every new membership into the MAS program. Learn more in your associate portal.
11. **Call members who are in your Pre-Cancel reports.** Many these can be saved, because in fact they didn’t really cancel at all, but rather they changed bank accounts or their card expired.
12. **Have a restaurant owner’s mentality** and try to help resolve any challenges the member is having.
Lastly – Not really a retention tip, but just a great TIP: Remember that each part of the membership application has a purpose. On the **white copy** (goes to corporate), make sure it is filled out correctly, legibly and completely. On the back of the **pink (their copy)** write down three situations the member has to use the membership. On the **yellow (your copy)**, have the new member give you 1-5 names of people you can help with the membership.