

# TOP 5 RETENTION TIPS

*By Melanie Lawson, Retention Analyst & V.P. of Field Performance, LegalShield*

1. Sell the membership 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.
2. 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.
3. Do not sell the member 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.
4. Make sure and have examples of everyday uses of the product for the new member. 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. Promote utilization!
5. 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.

# TOP 10 LIST FOR PERSISTENCY

*By Tony Petrill, \$250K Ring Earner & V.P. of Sales, LegalShield*

1. Call your members in pre-cancel status.
2. Get your new members email address and make sure you sign up every new membership for Integrity Resources.
3. Don't make emergency/911 type sales or utilize on-line leads.
4. Be sure that you call your new member in the first week of their membership.
5. Be sure to explain that service may be interrupted if they choose to pay by credit card and it expires. Encourage them to choose the bank draft option.
6. Explain the information they'll find on their membership card and go over the Will Questionnaire.
7. Have a restaurant owner's mentality and try to help resolve any challenges the member is having.
8. Add-on the Identity Theft Shield and have the **credit monitoring authorization form** ready to fill out and fax in after the membership is processed.
9. Sell the membership correctly (use third party tools, don't oversell, use stories, etc.).
10. Remember that each part of the membership application has a purpose. On the back of the **pink copy** write down three situations the member has to use the membership. On the **yellow copy** have the new member give you 1-5 names of people you can help with the membership. On the **white copy** make sure it is filled out correctly, legibly and completely.