Getting Started Guide

Contact List

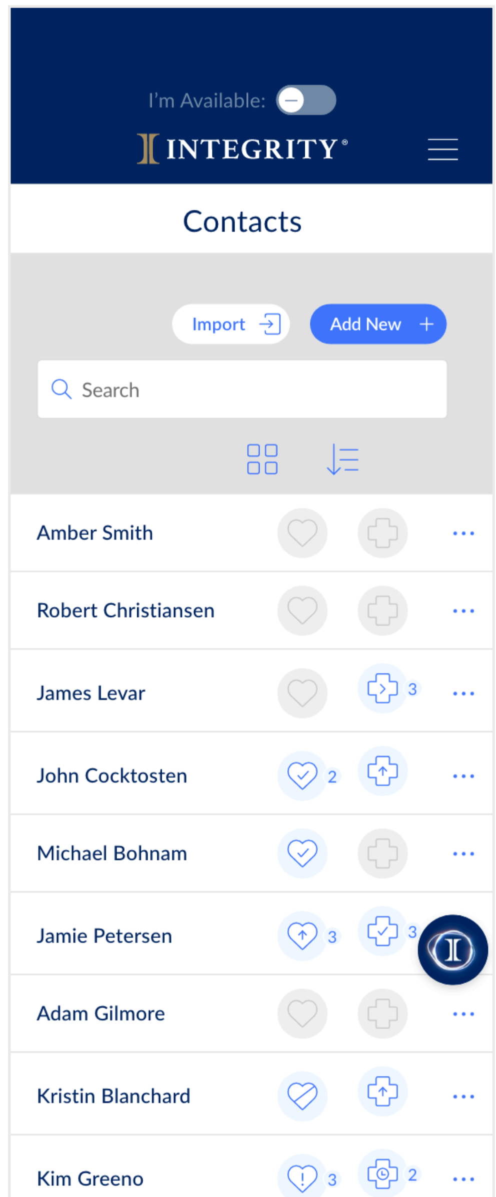
Agents can quickly and easily manage their relationships with their clients in Integrity from through the entire sales process from leads through sales, including annual renewal and cross-sell opportunities.

To see all Contacts the agent has added to Integrity or that have been created in Integrity from LeadCENTER, click Contacts in the top bar. In addition to bulk importing Contact records and creating Contacts one at a time, the Contact List lets agents search, sort, and filter their Contact records.

Contact List Information

Each Contact record on the Contact List screen shows the following information:

- Contact Name
- Stage
- Tags
- Life Policy(ies)
- Health Policy(ies)



Bulk Export and Bulk Delete

The first column on the Contact record has the “Select” checkbox to the left of the Contact’s name. Clicking the box for one or more Contacts makes the Export and Delete options available.

Contact Name

All Contact records require a first and last name, which can be clicked to go to the Contact Details screen.

Getting Started Guide

Contact List

Stage

The Stage dropdown helps agents track where the Contact is in the sales cycle. Stages are either updated automatically by Integrity or manually updated by the agent. The choices, in chronological order based on sales cycle, are:

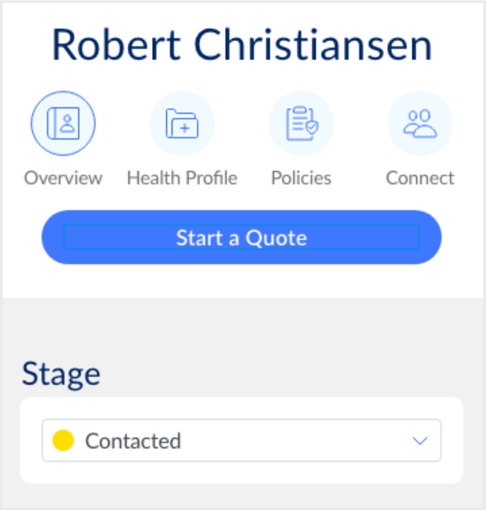
New: Default value for new Contacts added to Integrity. Helps agents find their leads quickly.
Contacted: Contacts the agent has reached out to through Integrity.
These Contacts have one or more call recordings linked to them (either incoming or outgoing), and / or the agent has sent them one or more Scopes of Appointment (Health Contacts only).
Engaged: A Contact with one of the following actions completed:

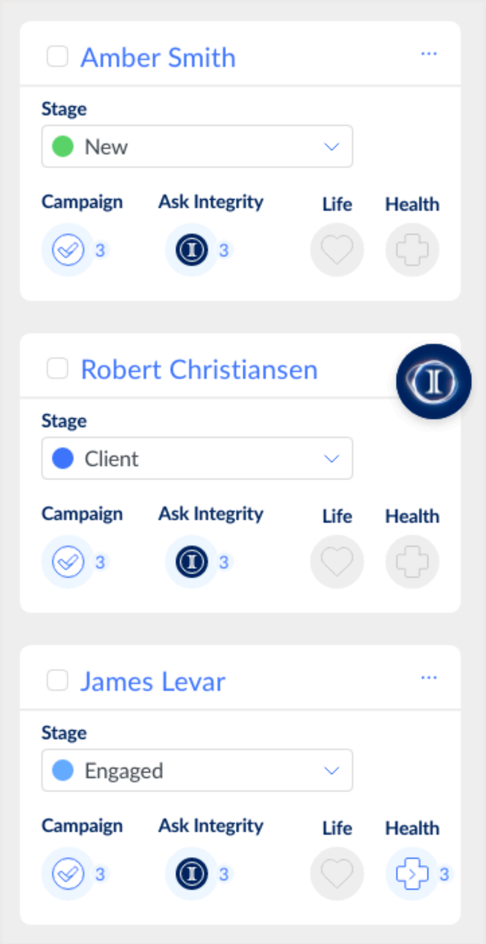
- Signed SOA (Health Contacts)
- Completed SOA (Health Contacts)
- Quote Shared (Health Contacts)
- Comparison Shared (Health Contacts)
- Health Intake completed (Life Contacts)

Client: The agent has sold one more policies to the Contact (Health and/or Life) and one or more policies is/are in effect or in progress.
Retained:

- Health Contacts: At least one annual renewal.
- Life Contacts: Two consecutive years of having a policy (based on effective dates)

Loyal: Three or more years of renewals / history plus at least one active or in progress plan (based on effective dates)
Lost: This stage can only be set by the agent. After setting the Contact's stage to Lost, the agent can choose from a list of reasons the Contact was lost.

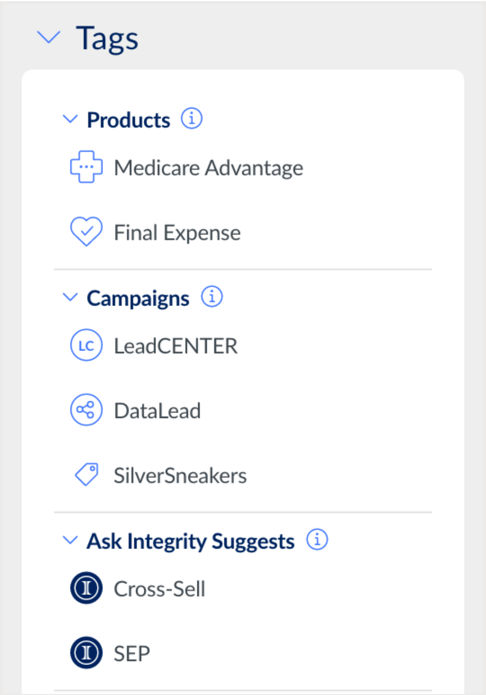




Contact List

Tags

Tags help agents quickly identify and review additional information about the Contact, including the product type, lead campaign information from LeadCENTER, and more. They're used for several purposes, including filtering the Contact List. Any tags that on the Contact record are shown in Tags column on the Contact List screen.



Policies

The next two columns on the Contact List screen are for Life and Health policies.

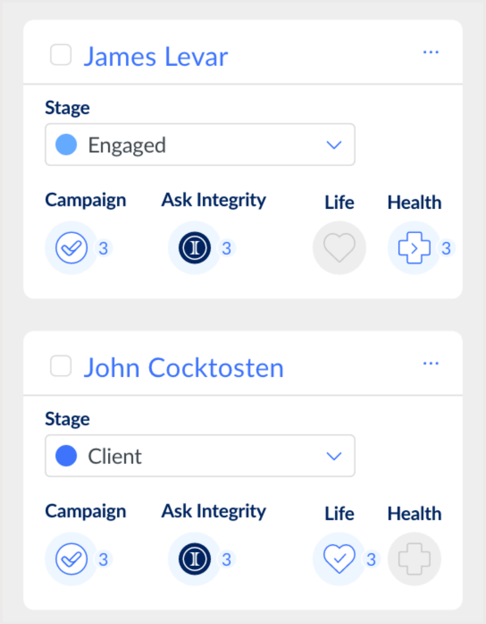
If the agent has sold one or more Final Expense policies to the Contact through an Integrity upline, the heart icon will be blue. If not, the heart icon will be gray.

If the agent has sold one or more Medicare policies to the Contact through an Integrity upline, the cross icon will be blue. If not, the heart icon will be gray.

Policies the agent has sold to the Contact through an Integrity upline are automatically connected to the Contact record by Integrity.

The final column in the Contact List helps agents take quick action on the Contact:

- View Contact – Jumps to the Contact Details screen
- Start Quote – Begins a Health or Life product quote
- Connect -
    - Call: Places a recorded outgoing phone call to the
    - Contact's phone number. The Contact record must include the Contact's phone number for this to work.
    - Email: Opens the agent's external email program (Outlook, Gmail, etc.) with the Contact's email pre-filled



- Call Script: Opens a window with the Health and Life disclosures that the agent is required to read to the
- Contact for compliance
- SOA
- Add Reminder: Creates a reminder for the agent on the Contact record
- Scopes of Appointment (Health agents only): Jumps to
- the Scopes of Appointment screen