

FirstStep

Your Guide to Becoming a
Successful LegalShield Independent Associate

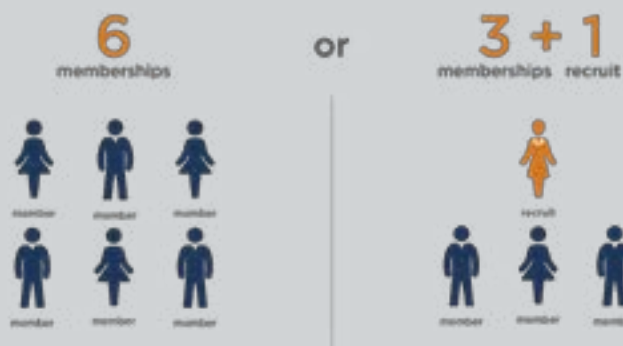


COMPLETE THIS DOCUMENT WITH YOUR SUPPORT TEAM AND GET PLUGGED INTO THE SYSTEM!
ACCESS YOUR DIGITAL STARTER KIT: connect.legalshield.com/start

COMPLETE THIS FIRST STEP GUIDE

with your sponsor during your Game Plan Interview and within your first 24 hours of getting started. If completing this form online, be sure to save the document before exiting out of the document.

LevelUp to Sr. Associate in your first 20 days to earn the \$180 LevelUp bonus in addition to your commissions!



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Step 1 Watch First Step video

You're in business for yourself but not by yourself. To help you launch your business, you will be provided with helpful tips and guidance along the way. Watch the First Step training video at:

connect.legalshield.com/firststep

Step 2 Know Your “Why?”

Everyone's "why" for starting their LegalShield business is different, and it is important to know your "why". Your "why" can help you stay focused on your goals. Do you want time freedom, financial freedom, extra income? Think about your "why" and write it below.

What is your “why” that drives you to succeed in building your LegalShield business?



Step 3 Create Your List

Our goal is to help you get paid and promoted. For each category below, write down 10 names and phone numbers. You will use your lists to help you get paid and promoted.

Friends & Family

Who do you want to share your business with? Who will give you 15 minutes of their time?

NAME	PHONE NUMBER
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____

Out of State/Province Relationships

Who do you know who lives outside of your state or province?

NAME	PHONE NUMBER
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____

Business Owners

Who do you know who is a business owner? Consider the people you associate with that own businesses, as well as those businesses that you frequently visit.

	NAME	# OF EMPLOYEES	PHONE NUMBER
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Professional Network/Centers of Influence

Who in your professional network would take time to listen to what you have to share? Who do you know who is a center of influence? Centers of influence are people who influence others, such as pastors, coaches, organizational leaders, etc.

	NAME	PHONE NUMBER
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		



Step 4 Launch Your Business

As a LegalShield Independent Associate, you have the choice to merely start your business or you can **LAUNCH** your business. The best way to launch your business, like launching any business, is by having a Grand Opening and letting as many people know about your business as you can. In LegalShield, we refer to Grand Openings as Private Business Receptions (**PBR**) and Private Conference Calls (**PCC**).

A Private Business Reception (PBR) is a living room presentation in your home. Who do you invite? Anyone who has ever been to your home in the past as well as anyone else you are comfortable inviting.

A Private Conference Call (PCC) is a conference call presentation. Who do you invite? Your long distance contacts and those who are unable to attend your Private Business Reception. Use the provided Private Business Reception checklist at the end of this guide and watch the [Private Business Reception videos](#) in your Digital Starter Kit to prepare for your PBR.

During your Private Conference Call, it is recommended your Sponsor, or another member of your support team, be on the line to do the presentation and to answer questions. Work with your upline to schedule and facilitate your PCC.

PRIVATE BUSINESS RECEPTION DATE & TIME

PRIVATE CONFERENCE CALL DATE & TIME

Your Support Team

Work with your support team to launch your LegalShield business and invite your guests to your PBR and PCC. Check out the ["How to Make an Invitation to your PCC"](#) audio clip in the Digital Starter Kit for an example invitation.

DIRECTOR NAME & PHONE NUMBER

SENIOR DIRECTOR NAME & PHONE NUMBER

EXECUTIVE DIRECTOR NAME & PHONE NUMBER



Step 5 Use Your Memberships

Facts tell and stories sell. Contact your provider law firm today or tomorrow to ask a legal question and begin building up your personal repository of stories to share with your prospects. Getting your Will questionnaire completed and submitted to your provider law firm is a great way to start using your membership too.

You will also want to set up your IDShield Dashboard so that you can begin monitoring your personal information through your app.

PROVIDER LAW FIRM & CONTACT NUMBER

REASONS TO CONTACT PROVIDER FIRM

NEED HELP? USE THE [101 REASONS TO USE YOUR LEGALSHIELD MEMBERSHIP](#)



Step 6 Use the Tools

There are many tools you can use to launch and grow your LegalShield business. There isn't a right or wrong tool to use. Select the [tools](#) you will be most comfortable using and use them to share LegalShield with 2-5 people every day. In your [Digital Starter Kit](#), you will find fact sheets, business presentations, videos, mobile apps, and more.



While tool selection is a personal preference, we highly recommend you download Prospect by LegalShield from the App Store or Google Play.

Prospect by LegalShield, or PBLS, is a prospecting tool that allows you to easily stay in touch with prospects as well as send resources via text, email and post to your social media platforms. When you meet someone and share information about LegalShield, ask them if you can send them more information. When they say 'yes', you simply enroll them into the campaign of your choice and let them know that they will need to confirm their email in order to receive more information. Many Associates do this with the prospect in front of them or while on the phone to ensure they do receive the information.

In addition to the Prospect by LegalShield app, the LegalShield and IDShield apps are highly recommended tools to help you sell and build your team. For step-by-step directions on how to download and set up your apps, visit the [Mobile Apps](#) page in your digital starter kit.

(link: <http://connect.legalshield.com/202020tools-videosapps>)



Step 7 Get Plugged In

Getting plugged in and staying connected is essential to the growth and success of your LegalShield business. To give yourself the best opportunity to succeed in LegalShield, be sure to participate regularly in as many of the following events as you can. For dates and locations of events, please visit legalshieldcalendar.com.

LevelUp Training

LevelUp training provides you with the knowledge you need to start your business and level up so that you can get paid and promoted. This class can be taken live in some markets or online 24-hours a day.

LEVELUP ([LIVE/ONLINE](#)) DATE/TIME/LOCATION

Business Briefing

Business briefings are live, professional presentations you can invite your prospects to to see the full LegalShield business presentation.

BUSINESS BRIEFING DATE/TIME/LOCATION

Leadership Show

Each week, the Corporate Office partners with successful, experienced Associates to host the Leadership Show. The Leadership Show is where you will hear important announcements first hand, as well as Associate testimonials and receive valuable training. To watch the Leadership Show each Monday at 10 am CT, log into your [Associates Only Back Office \(AOBO\)](#) and click on Events & Calls and Web Shows to find the upcoming show or to watch the replay of a past show.

Conference Call

You are part of a team, and your team leaders hold conference calls every week to help you stay motivated and continue to learn the business.

CONFERENCE CALL DATE/TIME

Super Saturday

Super Saturdays are exciting 4-6 hour training, recognition and recruiting events held in many markets on a monthly basis.

SUPER SATURDAY DATE/TIME/LOCATION

LegalShield Conventions

Each year LegalShield hosts two conventions providing training, recognition, and motivation for all Associates across North America. To accelerate your growth and shorten your learning curve by 6-12 months, register and attend these conventions. As a new Associate in your LevelUP period, you can register for these conventions at the deeply discounted rate of \$49. You will receive more information about this promotional rate in your Associate Onboarding program via email.

CONVENTIONS DATE/TIME/LOCATION

Step 8

LevelUp and Performance Club Qualify (PCQ)

LevelUp to Sr. Associate in your first 20 days to earn the \$180 LevelUP bonus!

LevelUp to Sr. Associate:

To LevelUp to Sr. Associate, you will need to:

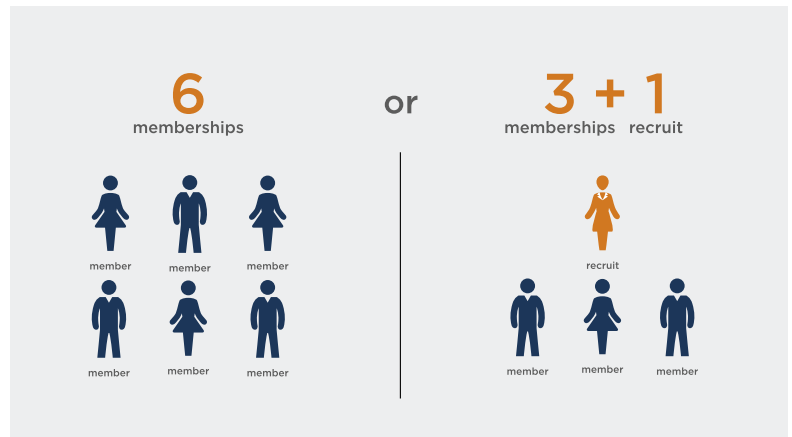
- Enroll 3 new members and sign up 1 new associate; or
- Enroll 6 new members.
- Do this in 20 days or less and you will earn your first LevelUP bonus!

Performance Club

Performance Club is another great program you can participate in from day one.

Performance Club is an incentive program that rewards you for consistent production. Some of the rewards include team and corporate

recognition, a monthly freedom bonus, and trips for two! The most exciting part about Performance Club is that you can begin to qualify your first month in the business!



How To Qualify:

Earn 120 points in one month and your name will appear on the Performance Club List!

How To Earn Points:

- Every \$1 Monthly Premium Volume is worth 1 point.
- Earn 40 points for a new recruit with a membership.
- Earn 20 points the first time your new recruit has activity (no time limit).
- Earn 20 points when your new recruit Levels Up in their first 20 days.



Ask Yourself... Do you know anyone associated with the following areas?

Accounting	Education	Lumber	Racing	Theatres	Massachusetts
Acting	Electrician	Mail	Radio	Therapists	Michigan
Advertising	Engineering	Management	Railroad	Tile Layers	Minnesota
Aerobics	Entertainment	Manufacturing	Real Estate	Tires	Mississippi
Air Force	Eye Care	Mathematics	Rehabilitation	Title Companies	Missouri
Airline	Fax Equipment	Mechanics	Religion	Tools	Montana
Alarm Systems	Farming	Mental Health	Rental Agencies	Towing	Nebraska
Antiques	Film Industry	Miniature Golf	Reporters	Townhouses	Nevada
Apartment	Firemen	Mobile Homes	Resorts	Training	New Hampshire
Architect	Fishermen	Mortgages	Rest Homes	Transmissions	New Jersey
Army	Florists	Motels	Restaurants	Trucking	New Mexico
Art	Food Service	Motion Pictures	Roller Blading	Typesetting	New York
Artificial Nails	Furniture	Movie Theatres	Roofing	Unions	North Carolina
Asphalt	Gardens	Museums	Safety	Universities	North Dakota
Athletics	Gift Shops	Music	Sales	Upholstery	Ohio
Auctioneer	Girls Clubs	Mutual Funds	Sandblasting	Used Cars	Oklahoma
Automobile	Golfing	Navy	Satellites	Vacuum Cleaners	Oregon
Babysitters	Government	Newspapers	School	Vending	Pennsylvania
Banking	Graphic Arts	Nurses	Screen Printing	Veterinarian	Rhode Island
Barber	Grocery Stores	Nutrition	Scuba Diving	Veterans	South Carolina
Baseball	Gymnastics	Office Machines	Secretaries	Video	South Dakota
Basketball	Hair Care	Office Furniture	Security	Volunteers	Tennessee
Beauty Salon	Handicapped	Oil Changes	Self Defense	Wallpaper	Texas
Bible School	Handyman	Optometrists	Sewing	Waste	Utah
Bicycles	Hardware	Orthodontist	Sheetrock	Watches	Vermont
Blinds	Health Clubs	Painting	Shoe Repair	Water Skiing	Virginia
Boats	Health Insurance	Parking	Siding	Weddings	Washington
Bonds/Stocks	Hearing Aids	Parties	Signs	Wine	West Virginia
Books	Helicopters	Pediatricians	Singing	Woodworking	Wisconsin
Bookkeeping	Hiking	Pediatricist	Skating	Writing	Wyoming
Boys Clubs	Horses	Pedicures	Skeet Shooting		
Broadcasting	Hospitals	Pensions	Skiing		
Brokers	Hotels	Perfume	Skin Care	States	Provinces/ Territories
Builders	Hunting	Personnel	Soccer	Alabama	Alberta
Buses	Ice Cream	Pest Control	Social Services	Alaska	British Columbia
Cable TV	Ice Skating	Pets	Softball	Arizona	Manitoba
Cameras	Income Tax	Pharmacies	Software	Arkansas	New Brunswick
Camping	Insurance	Phones	Spas	California	Newfoundland
Crafts	Investments	Photography	Sporting Goods	Colorado	Northwest Territories
Credit Union	Janitor	Physician	Steam Cleaning	Connecticut	Nova Scotia
Day Care	Jewelry	Pianos	Stereos	Delaware	Nunavut Territory
Delivery	Judo	Pizza	Stocks	Florida	Ontario
Dentists	Karate	Plastics	Surgeons	Georgia	Prince Edward Island
Dermatologists	Kindergarten	Plumbing	Surveyors	Hawaii	Quebec
Designers	Laundries	Police	T-Shirts	Idaho	Saskatchewan
Detectives	Lawn Care	Pollution	Tailors	Illinois	Yukon Territory
Diet Industry	Leather	Pools	Tanning Salons	Indiana	
Direct Mail	Leasing	Preschools	Taxes	Iowa	
Disc Jockey	Libraries	Printing	Teachers	Kansas	
Doctors	Lighting	Property Mgmt.	Telecommunications	Kentucky	
Driving Range	Livestock	Psychiatrists	Telemarketing	Louisiana	
Dry Cleaners	Loans	Psychologists	Television	Maine	
Dry Wall	Luggage	Publishers	Tennis	Maryland	



PBR Private Business Reception Checklist

What is a PBR?

A **Private Business Reception (PBR)** is a living room presentation conducted in your home.

Why do PBR's?

- ✓ To leverage your time in presenting LegalShield to multiple contacts at one time
- ✓ To launch your business by creating a team of associates at once
- ✓ To LevelUp in your first 3-5 days on this one night
- ✓ To leverage off the interest of some contacts and to garner others' interest (domino effect)
- ✓ To set off a chain reaction of future PBR's



Invitation

- ☐ Make a list of all of your warm contacts
- ☐ Pick a date, set it in stone
- ☐ Decide on your invitation script (but don't sound scripted)
- ☐ Invite with urgency; be brief
- ☐ Let them know you appreciate that you can COUNT ON THEM to be there
- ☐ If your prospect asks questions, use your "Why" to encourage them to come
- ☐ Confirm your invites with confirmation calls with your upline
- ☐ Ask guests to bring something (bag of ice, chips, etc.)

Set Up

- ☐ Don't rearrange the room or add chairs (until they're needed)
- ☐ Keep refreshments simple—no alcohol
- ☐ No kids, pets, or distractions—plan ahead
- ☐ Don't have materials out for people to take home or they will!

Introduction

- ☐ Welcome your guests and share your story and your "Why"
- ☐ Edify the speaker or the DVD

Presentation

- ☐ Guest speaker can use boards or flip chart (stay concise and share stories)
- ☐ If there is no guest speaker, play the DVD and watch intently with guests
- ☐ After the DVD, call your upline via speaker phone to help your prospect make a decision

Close

- ☐ Ask for the order! Pass out apps, uncapped pens, and hard writing surface
- ☐ POSTURE—Confidence—Get them writing
- ☐ Focus on the excited ones, not the negative or blah ones
- ☐ Do not ask for questions; handle them separately
- ☐ Paint the picture of what you all will accomplish together as a team
- ☐ Put them in "dream mode"
- ☐ Book PBR's for each new associate as they finish their forms

Duplicate

- ☐ The reason to do a PBR is to book the next wave of PBR's.
- ☐ Be sure your associate comes, watches, and learns how to do PBR's
- ☐ Your end game is to have an army of PBR presenters in action nightly!

