



WAYS TO INTEGRATE PRIME

Below are a few successful ways we have integrated with our partners. We'd love to discuss which options make sense for you and if there is anything else that you think would fit well with your products/services.

- 1) **POSITION PRIME INTO YOUR CUSTOMER ENROLLMENT PROCESS/CALL.** Integrate the "Complimentary Tax Strategy and Asset Protection Consultation" with a "Complimentary VIP Entity Set Up" on the initial enrollment call/process as a bonus to their purchase with you.
- 2) **WEBINAR TO BUYERS/POTENTIAL BUYERS.** We can do a Webinar to introduce PRIME, or revisit it on a periodic basis, on topics relatable to your customers.
- 3) **EMAIL CAMPAIGN.** We are happy to provide copy to send out to your customer base. Please provide numbers on your customer base, open rate, CTR, etc. to our marketing team before you deploy the campaign.
- 4) **SEND US A HARD LEAD FILE TO OUTBOUND.** Send us a lead file of past customers as well as new and future customers that our Scheduling department can do a soft outbound call to schedule their complimentary consultation (This works after you have introduced PRIME by email or some other way).
- 5) **ADD "CALL WITH PRIME" AS A NEXT STEP IN THE CLIENT'S WELCOME EMAIL.** Integrate call with Prime as an action step on a Welcome Email that comes from you to clients who purchase one of your products.
- 6) **BACK OFFICE / PORTAL LISTING.** Integration into the back office or portal that your customers get when they purchase a membership, if that exists.