



CRM & Custom Lists



Overview

- Where to start with custom lists
- Creating a custom list
- Add contacts
- Campaigns (in general)
- Sending/scheduling campaigns to custom lists
- Sending/scheduling campaigns to individual contacts

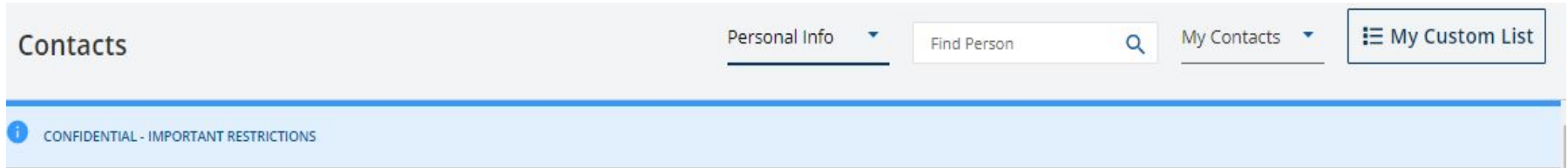
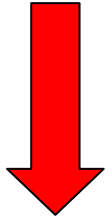
No Phone/No Email - Existing Contacts

Update your contacts. If your clients have no email account on file, then they won't be able to get the campaigns. It's important to update each client to have a valid email on file.

The screenshot shows the PRIMERICA Contacts management interface. At the top, there is a navigation bar with the PRIMERICA logo, a user profile icon (LE), and a 'Contacts' header. Below the header, there are tabs for 'Personal Info', a search bar labeled 'Find Person', and a 'My Contacts' dropdown menu. A 'My Custom List' button is also visible. A blue banner indicates 'CONFIDENTIAL - IMPORTANT RESTRICTIONS'. Below this, there is a search bar for the contact list and an 'Advanced Search' section. Suggested searches include 'All (2,259)', 'Prospects Only (136)', 'Clients Only (2,003)', and 'Recently Added (1)'. The main content area shows 'All Contacts : 50 of 2,259 result(s)' and a filter dropdown set to 'Select'. There are 'Clear All Filters' and 'Refresh' buttons. The page number is 'Page 1 of 46'. A table header is visible with columns: Type, First Name, Last Name, Phone, Email, Unsubscribed, Contact Last Updated, Language, Life, Investment, DOB, Age, and Notes.

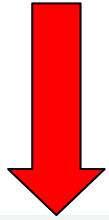
Type	First Name	Last Name	Phone	Email	Unsubscribed	Contact Last Updated	Language	Life	Investment	DOB	Age	Notes
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Step 1: Create a new custom list



When you log into your CRM page, select contacts from the menu on the left then “My Custom List” in the top right corner.

Step 1: Create a new custom list (continued)



Custom Lists

Create New Custom List



View, Edit, Delete or Create New Custom Lists



Once on the Custom List page, select “Create New Custom List” in the TOP RIGHT corner.

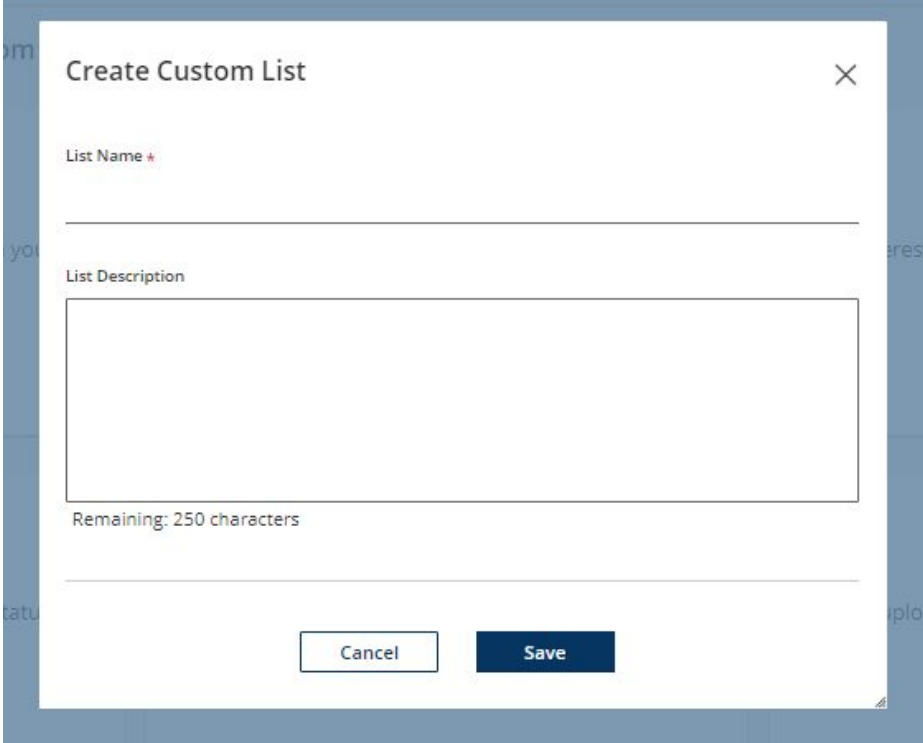
Step 2: Name your custom list

We will be creating 2 custom lists today.

- 1) No Email & No Phone
- 2) No Email WITH a Phone

In the description detail how you will reach out to these contacts.
Phone? Snail mail?

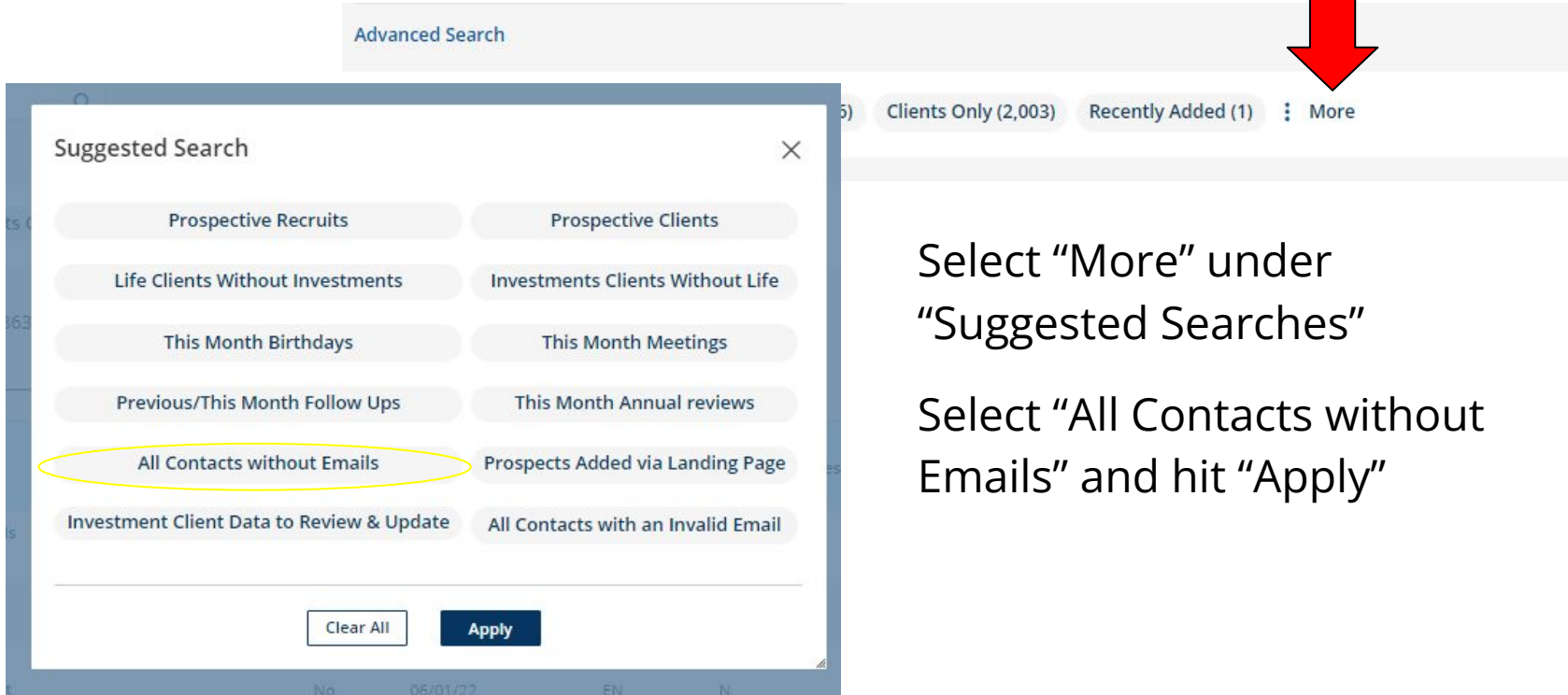
Remember: the goal is to get an active email address for everyone in your contact list



The screenshot shows a 'Create Custom List' dialog box with the following fields and controls:

- Create Custom List** (Title bar)
- List Name *** (Text input field)
- List Description** (Text area)
- Remaining: 250 characters (Character count)
- Cancel** (Button)
- Save** (Button)

Step 3: Filter clients without emails



Advanced Search

5) Clients Only (2,003) Recently Added (1) More

Suggested Search

- Prospective Recruits
- Prospective Clients
- Life Clients Without Investments
- Investments Clients Without Life
- This Month Birthdays
- This Month Meetings
- Previous/This Month Follow Ups
- This Month Annual reviews
- All Contacts without Emails**
- Prospects Added via Landing Page
- Investment Client Data to Review & Update
- All Contacts with an Invalid Email

Clear All Apply

Select "More" under
"Suggested Searches"

Select "All Contacts without
Emails" and hit "Apply"

Step 3: Filter clients without emails (continued)

Your contacts should look something like this.

Sorted alphabetically by people who do NOT have an email on file.

<input type="checkbox"/>	Type	First Name	Last Name	Phone	Email ↓	Unsubscribed	Contact Last Updated	Language	Life	Investment	DOB	Age	Notes
<input type="checkbox"/>	C					No	09/09/22	EN	N	Y	12/12/71	50	
<input type="checkbox"/>	C					No	09/09/22	EN	Y	N	12/28/73	48	
<input type="checkbox"/>	C					No	09/22/22	EN	N	Y	12/31/47	74	
<input type="checkbox"/>	P					No	06/27/22	EN	N	N	09/28/42	79	
<input type="checkbox"/>	C					No	09/09/22	EN	N	Y	03/06/71	51	

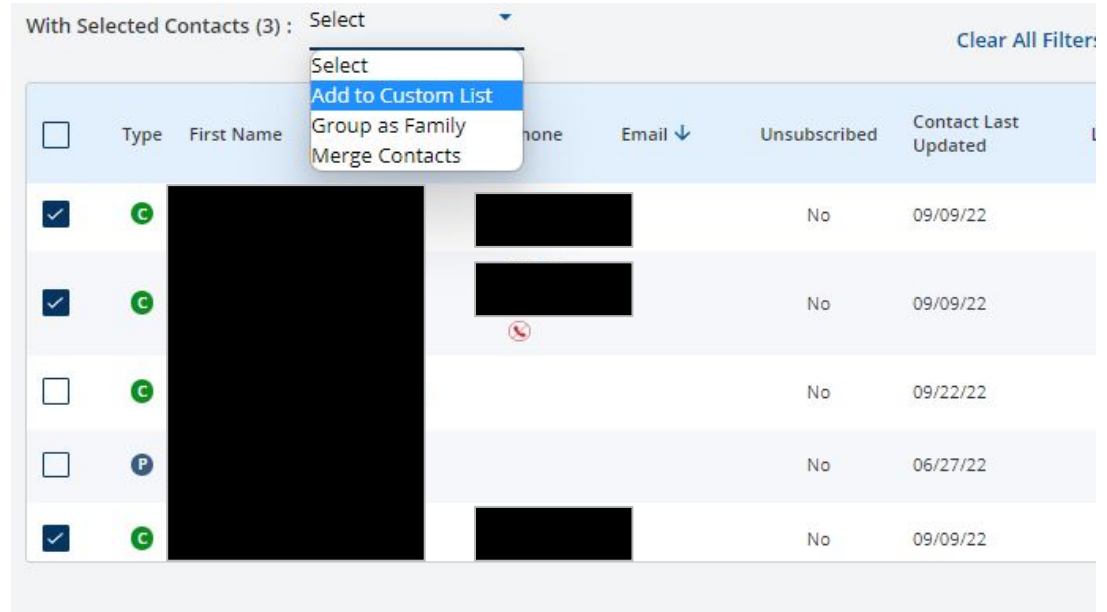
Step 4: Select contacts to add to list

Check all of the contacts on the page that fall into the set parameters (for example, No Email WITH Phone).

Using the dropdown menu at the top, select "Add to Custom List"

Then select the appropriate list.

Repeat for all pages in your database.



The screenshot shows a contact management interface. At the top, there is a header bar with the text "With Selected Contacts (3) : Select" and a "Clear All Filters" link. Below the header is a table with columns: "Type", "First Name", "Phone", "Email", "Unsubscribed", and "Contact Last Updated". A dropdown menu is open over the "Select" text, showing options: "Select", "Add to Custom List" (highlighted in blue), "Group as Family", and "Merge Contacts". The table contains five rows of contact data. The first two rows have checkboxes checked, and the last row also has a checked checkbox. The first name column is redacted with a black box. The "Unsubscribed" column shows "No" for all contacts. The "Contact Last Updated" column shows dates: 09/09/22, 09/09/22, 09/22/22, 06/27/22, and 09/09/22.

<input type="checkbox"/>	Type	First Name	Phone	Email	Unsubscribed	Contact Last Updated
<input checked="" type="checkbox"/>	C	[Redacted]	[Redacted]	[Redacted]	No	09/09/22
<input checked="" type="checkbox"/>	C	[Redacted]	[Redacted]	[Redacted]	No	09/09/22
<input type="checkbox"/>	C	[Redacted]	[Redacted]	[Redacted]	No	09/22/22
<input type="checkbox"/>	P	[Redacted]	[Redacted]	[Redacted]	No	06/27/22
<input checked="" type="checkbox"/>	C	[Redacted]	[Redacted]	[Redacted]	No	09/09/22

Step 5: Start reaching out

1) No Email & No Phone

- a) Contact via snail mail letter. Ask them to call you so you can update their contact information.
- b) Use the notes section to keep track of who you have sent letters to.

2) No Email WITH a Phone

- a) Contact via phone. Goal is to get a valid email on file. You can also check in and see if they have anything new going on. Take notes on the conversation or if you left a message.

Step 6: REPEAT

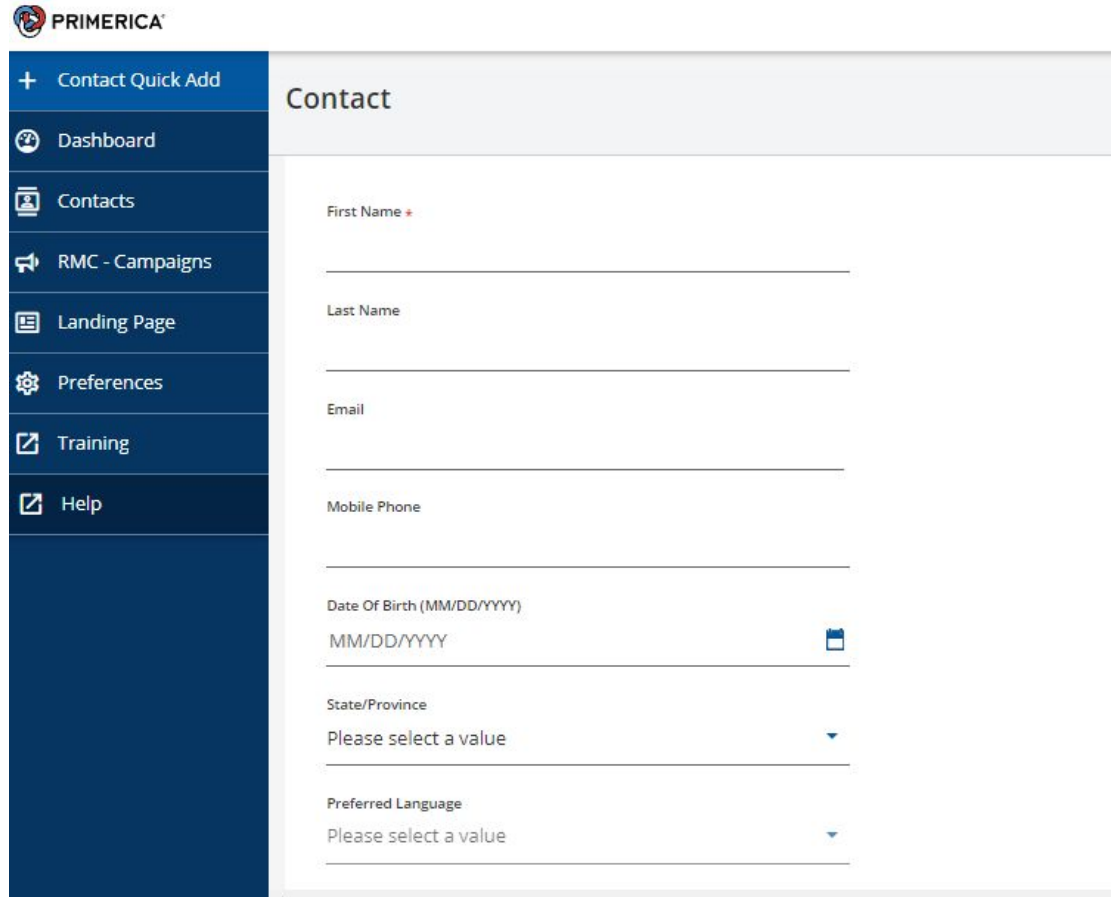
Repeat these steps for all different lists. Use the campaigns as guides.

- Over or approaching 65
- Recently married
- Recently had or are planning to have children
- Nearing retirement
- Recently graduated from college
- THE POSSIBILITIES ARE ENDLESS

Add New Contacts

Take 1 campaign at a time and think about who you have in your phone that might be interested in each category.

Use the + Contact Quick Add to input their information into your database and set them up for specific campaigns.



The screenshot displays the PRIMERICA CRM interface. On the left is a dark blue navigation sidebar with the PRIMERICA logo at the top. The sidebar menu includes: '+ Contact Quick Add' (highlighted), 'Dashboard', 'Contacts', 'RMC - Campaigns', 'Landing Page', 'Preferences', 'Training', and 'Help'. The main content area is titled 'Contact' and contains a form with the following fields: 'First Name' (with a red asterisk), 'Last Name', 'Email', 'Mobile Phone', 'Date Of Birth (MM/DD/YYYY)' (with a calendar icon), 'State/Province' (a dropdown menu showing 'Please select a value'), and 'Preferred Language' (a dropdown menu showing 'Please select a value').

Campaigns

Select “Campaigns” from the menu on the left.

To select campaigns to use, click the star in the right hand corner. You can also Preview each campaign under each description.

Please note: Selecting the star DOES NOT send a campaign automatically. It just makes it available to send.

The screenshot displays the 'Rep Marketing Center' interface. At the top right, there is a 'Learn More' button. The main content area is a grid of six campaign cards, arranged in two rows and three columns. Each card has a title, a description, and two buttons: 'Preview' and 'Results'. A blue star icon in the top right corner of each card indicates it is selected.

Campaign Title	Description	Preview	Results
Senior Health Eligible	Send this to clients who are approaching age 65. Let them know you're available to help connect them with the Primerica Senior Health Referral Program.	Preview	Results
Individual Retirement Account	Send this campaign to your contacts to educate them about Individual Retirement Accounts (IRAs).	Preview	Results
Retirement	Remind your contacts that there is no better time to start preparing for retirement than now.	Preview	Results
1 on 1 Recruiting	Share Primerica's 1 on 1 Recruiting Brochure with your prospective recruit.		
Life Insurance	Check in with your investment contacts who don't have a life policy and remind them of the importance of life insurance.		
401(k) Rollover	Send this campaign to your contacts to encourage them to reach out to you to discuss old retirement accounts.		

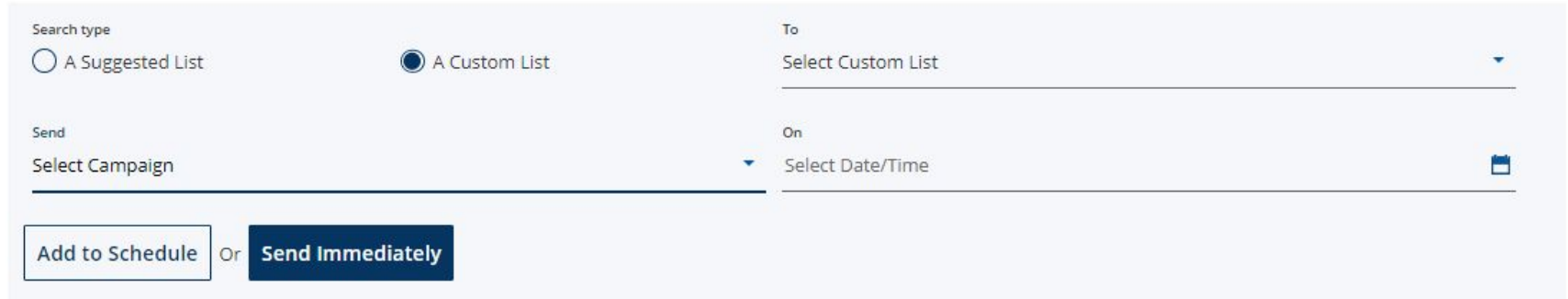
Campaigns (continued)

Go back into your contacts using the menu

You can add specific campaigns to each contact OR using a custom list, you can send a campaign to that list.

Send a Campaign to a List

Send a campaign immediately or schedule to send in the future. Campaigns scheduled to send to a list will send to all contacts actively on the list at the time the campaign is scheduled for delivery.



The screenshot shows a user interface for sending a campaign to a list. It features two radio buttons for 'Search type': 'A Suggested List' (unselected) and 'A Custom List' (selected). Below this are two dropdown menus: 'Send' with 'Select Campaign' and 'To' with 'Select Custom List'. To the right of the 'On' dropdown is a calendar icon. At the bottom, there are two buttons: 'Add to Schedule' and 'Send Immediately', separated by the word 'Or'.

Search type

A Suggested List A Custom List

Send

Select Campaign

To

Select Custom List

On

Select Date/Time

Add to Schedule Or Send Immediately

Campaigns (continued)

Lisa Froelich Client/Rep Actions X

CONFIDENTIAL - IMPORTANT RESTRICTIONS

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Annual Review on February 07 Last Purchase on March 31, 2022

✓ Life ✓ Investments ✓ Rep

Currently includes active life and investment Clients. Additional products coming soon.

Follow Ups (0) 👁 +

Meetings (0) 👁 +

Notes 👁 +

Details Family Sales Activity **Campaign** Products Financial Info Custom Lists

Personal Info

Preferred Name	First Name *	Middle Name	Last Name
	Lisa	Dobie	Froelich
Preferred Language ⓘ	Gender	Birth date	Age

Campaigns (continued)

Scroll down to customize campaigns for clients. Schedule or send immediately.

Lisa Froelich Client/Rep Actions ▾

Favorite Campaigns	
Campaign	Last Sent
<input type="checkbox"/> 401(k) Rollover Send this campaign to your contacts to encourage them to reach out to you to discuss old retirement accounts.	Opened on —
<input type="checkbox"/> Education Savings Account Send this campaign to your contacts to help them consider saving for children's education expenses with an Education Savings Account.	Opened on 7/27/22 03:11 PM
<input checked="" type="checkbox"/> Invest With Your Head, Not the Headlines Remind clients they should not change their approach to investing during times of market volatility.	Opened on —

Send On
Select Date/Time

Or

GET STARTED TODAY!

Use the tools.

Go into your own CRM, start organizing and utilizing the tools.