

Log into POL & select CRM

 08/21_57_5157 [+ Prospect Quick Add](#) [primerica app](#) [turboapp](#) [crm](#) [virtual base shop](#) [my account](#) [hurdlr \(formerly deductr\)](#) [mail](#) [contact us](#) [support center](#) [log](#)

Welcome Lisa Dobie | April 13, 2022


[POL Home](#) [My POL](#) [Competition Scoreboard](#) [Training & Development](#) [Life Licensing](#) [Other Licensing](#) [Products](#) [Field Support](#) [Compliance](#)

The Home Office will close at 4 p.m. ET on Thursday, April 14 and will be closed all day on Friday, April 15. Normal business hours will resume on Monday, April 18.

All In
APRIL
NEW:

WEEKLY CRM TRAINING!
JOIN TOP LEADERS VIA ZOOM
EVERY TUESDAY AT 11 A.M. ET

DAILY BOOST



ANDREA BURKS
OUR MISSION



MIT PHOTOS APRIL 2022

No. 122



ARTS WANA

Enter SSN



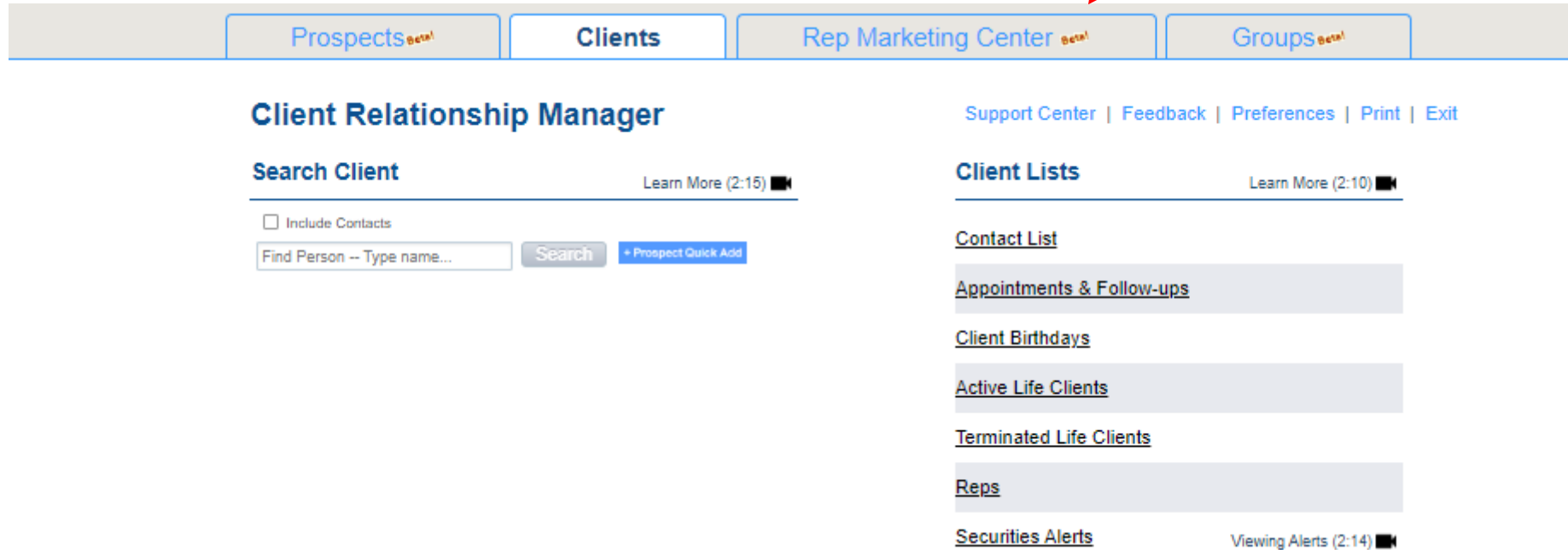
 [Verify](#)

To better help you safeguard privileged client and business information, we've added a second layer of protection to this section of Primerica Online.

To access this section, please enter **YOUR** Social Security Number. You will be asked to verify your information one time per session.

SSN

Select Rep Marketing Center



The screenshot shows the 'Client Relationship Manager' interface. At the top, there is a navigation bar with four tabs: 'Prospects ^{Beta!}', 'Clients', 'Rep Marketing Center ^{Beta!}', and 'Groups ^{Beta!}'. A red arrow points to the 'Rep Marketing Center' tab. Below the navigation bar, the page is divided into two main sections. The left section is titled 'Client Relationship Manager' and contains a 'Search Client' section with a search input field, a 'Search' button, and a '+ Prospect Quick Add' button. The right section is titled 'Client Lists' and contains several links: 'Contact List', 'Appointments & Follow-ups', 'Client Birthdays', 'Active Life Clients', 'Terminated Life Clients', 'Reps', and 'Securities Alerts'. There are also links for 'Support Center', 'Feedback', 'Preferences', 'Print', and 'Exit' at the top right of the page.

Prospects ^{Beta!} | Clients | **Rep Marketing Center ^{Beta!}** | Groups ^{Beta!}

Client Relationship Manager

Support Center | Feedback | Preferences | Print | Exit

Search Client [Learn More \(2:15\)](#)

Include Contacts

Find Person -- Type name... [+ Prospect Quick Add](#)

Client Lists [Learn More \(2:10\)](#)

[Contact List](#)

[Appointments & Follow-ups](#)

[Client Birthdays](#)

[Active Life Clients](#)

[Terminated Life Clients](#)

[Reps](#)

[Securities Alerts](#) [Viewing Alerts \(2:14\)](#)

Select “Landing Page” then CLICK “Edit Your Page”

PRIMERICA

+ Contact Quick Add

RMC

Contacts

Landing Page

Preferences **Landing Page**

Share your landing page link with people you know

Edit Your Page Results

How it works:

1. RVPs customize their page, when site is live reps are notified
2. RVPs can choose to allow reps to create their own personal landing page
3. RVPs select and set up their preferred meeting type and can use scheduling link
4. All reps create personal link to share with leads
5. Lead data is captured and added to prospect list
6. Meeting roster is provided to RVP & OM
7. Lead will receive a [meeting confirmation](#) and reminders the [day before](#) and [day of](#) meeting.

Edit Your Page Preview In Browser

BRENNAN

Start and grow a business in the financial services industry.

Top into a growing and under-served market. It's the perfect business because you have the products and the systems — and the demand.

Kathleen Brennan

Choose a link. *Must include your last name!*

< Edit Landing Page

Create Your Personalized Link *

ⓘ Approval Required

- Must include last name.
- Can include letters, numbers, hyphens, and underscores only.

https://livemore.net/ *

Skip for now...we will come back to this

Add Your Scheduling Link

ⓘ Approval Required

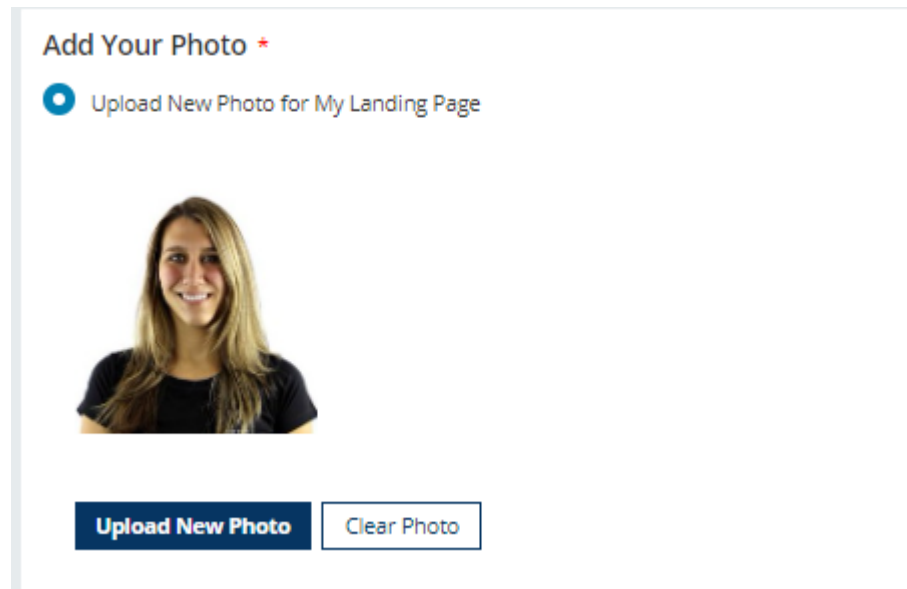
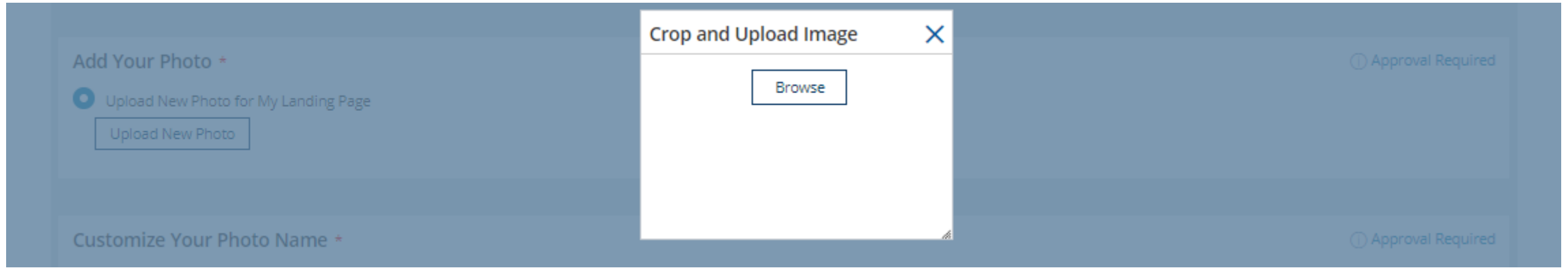
Provide your scheduling link *

Value can not be blank

By checking this box, I am confirming that the scheduling link, I have added is connected to my Primerica.com email address.

I attest that the meeting link I am providing complies with Primerica's [Guidelines for Scheduling Tools](#).

Upload an Image



Select your name or PEP name

Customize Your Photo Name *

① Approval Required

If You Uploaded A Photo Including Your PEP (Partnership Empowerment Program) Partner, You Must Include Your Official PEP Name In The Field Below.

My Name

Name *




Last Name *

PEP Name

If You Uploaded A Photo Including Your Partner, You Must Use Both Of Your Names. Please Review The Pep Name Below And Update If Needed. This Is Only For RMC Display And Will Not Be Changed Anywhere Else. Name Should Be Updated As Follows: 1) Same Last Name: Rep First Name & Partner First Name Last Name 2) Different Last Name: Rep First Name Last Name & Partner First Name Last Name.

Choose which video you'd like showcased (more to come)

Select A Video EN | SP | FR

- Financial GPS (LFIC) Duration: (0:58)

- Live More with logo Duration: (3:06)

- Live More without logo Duration: (3:05)


Select whether or not you'd like the Primerica logo on your page

Display Primerica Logo



Scheduler – head to Calendly.com



Individuals

Teams

Enterprise

Product ▾

Pricing

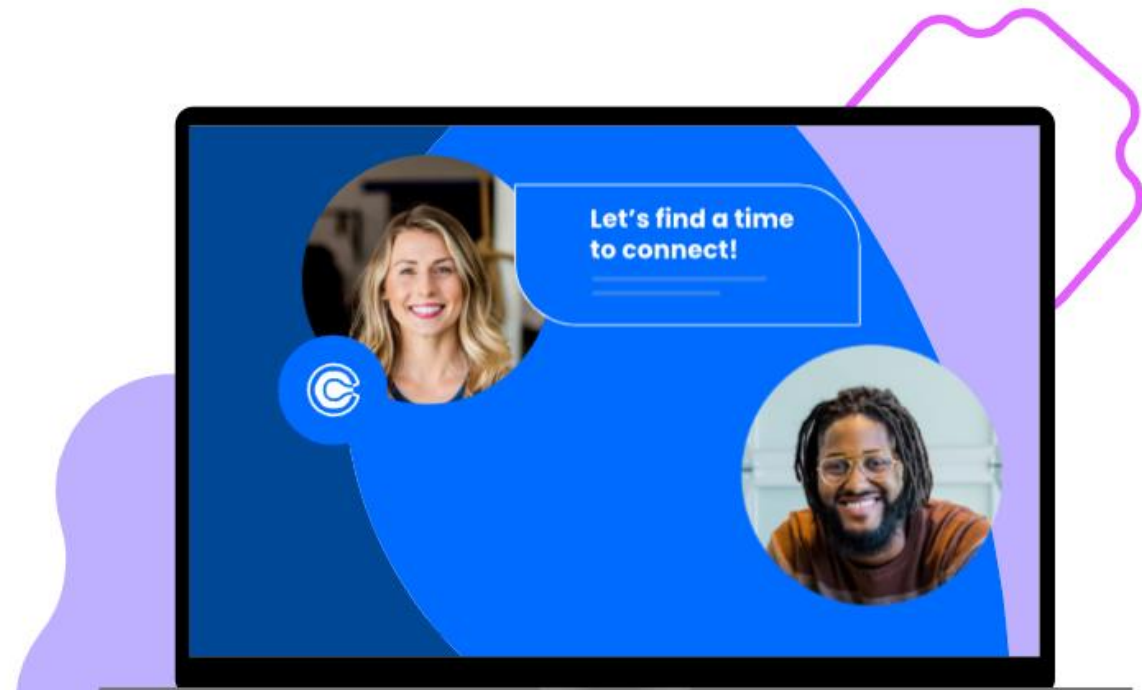
Resources ▾

Log In

Get started

Easy scheduling ahead

Calendly is your hub for scheduling meetings professionally and efficiently, eliminating the hassle of back-and-forth emails so you can get back to work.



Click the blue GET STARTED button & use your primerica.com email address

divid


es


Get started today

ldobie@primerica.com

Get Started

OR

 Sign up with Google

 Sign up with Microsoft

g

et's
o c

ee tir
ing t
t ba

Go to Primerica.com email to confirm your email address



- After you confirm your email...you should get to this page where you can create your link

Welcome to Calendly!

We take the work out of connecting with others so you can accomplish more.

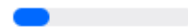
Create your Calendly URL

Choose a URL that describes you or your business in a concise way. Make it short and easy to remember so you can share links with ease.

Calendly.com/ ✓

Time Zone

Central Time - US & Canada (09:28pm) ▾




Set up later

Continue


(optional) connect to an existing calendar

Connect your calendar




Connect your calendar to auto-check for busy times and add new events as they are scheduled.



G
Google

-  **Google Calendar**
Gmail, G Suite

Microsoft

-  **Office 365 Calendar**
Office 365, Outlook.com, live.com, or hotmail calendar
-  **Exchange Calendar**
Exchange Server 2013, 2016, or 2019
-  **Outlook Plug-In**
Outlook 2007 and higher, with Windows 7 and higher

Create your meeting. Free version of Calendly allows 1 meeting type.

The screenshot displays the Calendly user interface. At the top, there is a navigation bar with the Calendly logo, 'Home', 'Availability', 'Integrations', 'Help', and an 'Account' dropdown menu. Below this, the main area is titled 'My Calendly' and contains tabs for 'Event Types', 'Scheduled Events', and 'Workflows'. The 'Event Types' tab is active, showing a list of meeting types. A specific meeting type card is highlighted, titled '30 Minute Meeting' with a duration of '30 mins, One-on-One'. A red arrow points to a gear icon in the top right corner of this card. A text box with a black border and white background contains the text: 'Click GEAR to customize meeting. You can rename, change length, etc.' To the right of the main content, a dark blue sidebar titled 'How to schedule an event' is visible. It contains a progress indicator with two steps: '1 Your calendar is connected' (marked with a green checkmark) and '2 Create an event type' (marked with a green circle). Below the second step, there is a blue button labeled '+ New Event Type' and a link that says 'Learn more about [event types](#)'. A close button (an 'X' in a circle) is located at the bottom right of the sidebar.

Home Availability Integrations Help Account

My Calendly

Event Types Scheduled Events Workflows

Filter

Lisa Froelich
calendly.com/lfroelich

30 Minute Meeting
30 mins, One-on-One
[View booking page](#)

Copy link Share

Click GEAR to customize meeting. You can rename, change length, etc.

How to schedule an event

1 Your calendar is connected

2 Create an event type

Define the type of event you want people to schedule with you. This includes the duration, location, and your availability.

+ New Event Type

Learn more about [event types](#)

Add questions to make your form look like this:

Additional Options

Invitee Questions
Name, Email + 3 questions

Cancel [Save & Close](#)

First Name * Last Name *

Email *

[Add Guests](#)

1 ↓ Language Preference

English

Spanish

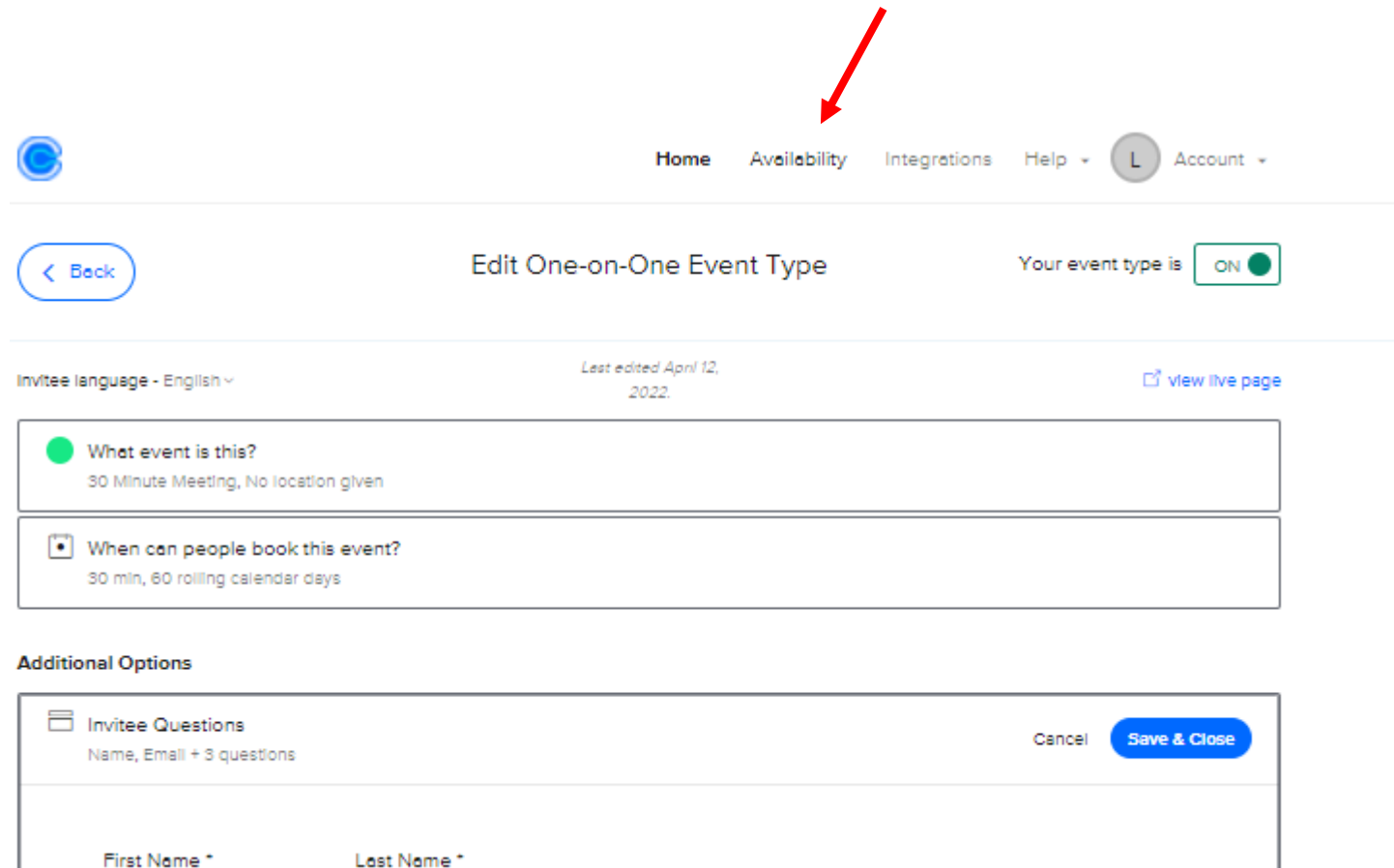
2 ↓ State/Province

3 ↓ Phone Number (optional)

[+ Add New Question](#)

Cancel [Save & Close](#)

Save, then click Availability at the top



The screenshot shows a web interface for editing an event type. At the top, there is a navigation bar with a logo on the left and menu items: Home, Availability, Integrations, Help, and Account. A red arrow points to the 'Availability' menu item. Below the navigation bar, the page title is 'Edit One-on-One Event Type'. To the left of the title is a 'Back' button, and to the right is a toggle switch for 'Your event type is ON'. Below the title, there is a section for 'Invitee language - English' and 'Last edited April 12, 2022', with a 'view live page' link. The main content area contains two sections: 'What event is this?' with a green dot icon and the text '30 Minute Meeting, No location given'; and 'When can people book this event?' with a calendar icon and the text '30 min, 60 rolling calendar days'. Below these is an 'Additional Options' section with a 'Invitee Questions' card. The card has a list icon, the text 'Invitee Questions', and 'Name, Email + 3 questions'. It includes 'Cancel' and 'Save & Close' buttons. At the bottom of the card, there are two input fields: 'First Name *' and 'Last Name *'.

Home Availability Integrations Help Account

< Back Edit One-on-One Event Type Your event type is ON

Invitee language - English Last edited April 12, 2022 view live page

What event is this?
30 Minute Meeting, No location given

When can people book this event?
30 min, 60 rolling calendar days

Additional Options

Invitee Questions
Name, Email + 3 questions Cancel Save & Close

First Name * Last Name *

Select the days and times you'll be available. Start with 2 days.

Set your availability

Choose a schedule below to edit or create a new one that you can apply to your event types

SCHEDULE

[Working hours](#) [+ New schedule](#)

Working hours ⚙️
★ default schedule

ACTIVE ON: 1 Event Type ▼ TIME ZONE: Central Time - US & Canada ▼

[List view](#) [Calendar view](#)

Set your weekly hours

<input type="checkbox"/>	SUN	Unavailable			+	📄
<input type="checkbox"/>	MON	Unavailable			+	📄
<input checked="" type="checkbox"/>	TUE	9:00am - 12:00pm	🗑️		+	📄
<input type="checkbox"/>	WED	Unavailable			+	📄
<input checked="" type="checkbox"/>	THU	9:00am - 12:00pm	🗑️		+	📄
<input type="checkbox"/>	FRI	Unavailable			+	📄
<input type="checkbox"/>	SAT	Unavailable			+	📄

Add date overrides

Add dates when your availability changes from your weekly hours

[Add a date override](#)

Return to home screen to copy your link

The screenshot displays the Calendly user interface. At the top, there is a navigation bar with links for Home, Availability, Integrations, Help, and an Account dropdown menu. Below this, the 'My Calendly' section is visible, featuring a '+ Create' button and tabs for Event Types, Scheduled Events, and Workflows. A search filter is present above the event list. The user's profile, 'Liss Froelich', is shown with their Calendly URL and a '+ New Event Type' button. The main content area shows a list of event types, with the first one, '30 Minute Meeting', highlighted. This event type is described as '30 mins, One-on-One' and includes a 'View booking page' link. At the bottom of the event type card, the 'Copy link' button is highlighted with a green border, and a 'Share' button is also visible.

Go back and enter calendly.com address into scheduling link box

Add Your Scheduling Link

ⓘ Approval Required

Provide your scheduling link *


Value can not be blank

By checking this box, I am confirming that the scheduling link, I have added is connected to my Primerica.com email address.

I attest that the meeting link I am providing complies with Primerica's [Guidelines for Scheduling Tools](#).

Submit landing page for review!

Share your landing page link with people you know

 Your Page Was Submitted For Approval. You'll Be Notified By Email When It's Ready

[Edit Your Page](#)

[Results](#)

How it works:

1. RVPs customize their page, when site is live reps are notified
2. RVPs can choose to allow reps to create their own personal landing page
3. RVPs select and set up their preferred meeting type and can use scheduling link
4. All reps create personal link to share with leads
5. Lead data is captured and added to prospect list
6. Meeting roster is provided to RVP & OM
7. Lead will receive a [meeting confirmation](#) and reminders the [day before](#) and [day of](#) meeting.

<https://livemore.net/lfroelich>

 Copy

[Edit Your Page](#)

[Preview in Browser](#)