

**Scripts**: Calling on Groups

**Philosophy**: Simplify the process, make the decision seem simple as if we don’t need permission.

**Strategy**: Use web-based enrollment to start the process and get their guard down.

**Verification**: I spoke with Legal Shield Associate Support for a long time, all is a go with the plan below.

Hello Business Owner: My name is Steve Schroeder with Harvard Risk Management. We are the largest broker for ID Theft and Legal Protection in North America, we offer employee assistance programs to millions of employees through ID Theft lunch and learns across the U.S. and Canada.

Do you have a minute?

Great, as I mentioned, we are the company that does ID Theft lunch and learns at no cost to business owners across the U.S. We just received notice from the FTC that ID Theft is about to skyrocket due to the Equifax breach in Sept 2017. Here is what we would like to do your business.

1. We will build a custom web-site for you with ID Shield Plus
2. We have been authorized to grant your employees a group rate normally reserved for 2000 employees or greater!
3. This website will allow your employees to sign up for ID Shield Plus with an unlimited guarantee of coverage, the first company in the history of ID Theft to put out such a strong guarantee. In addition, each employee will be assigned a Dedicated Licensed Private Investigator with an additional $1,000,000 in reimbursement policy on top of the unlimited coverage benefit to cover any expenses they may incur should their ID be stolen or compromised. This includes wage losses, legal fees, travel expenses and more if necessary.
4. It’s an incredible plan, we have searched all of them, this is the best. Just $8.45 per month individual or $15.95 for family which now includes full coverage on up to 10 dependents! Employees can choose credit card, bank draft, or payroll deduction.

**Do you have a preference?** Either way we provide them with 24-7 protection and 24-7 support.

1. We can give your employees a special rate normally reserved for 2000 employee groups or greater.
2. No cost, no commitment, no requirements, everything is handled for you.
3. We can then send a professional out to buy lunch, explain the benefits, give out some prizes, leave everyone tips on the latest scams, and then show them how to download and use the app.
4. We can do this in 10 minutes without lunch or 20 minutes with lunch. Or we don’t need to come out at all, it’s up to you.
5. If they enroll, they are protected for life and we will freeze their special rate as a benefit from you the owner and lock that rate for as long as desired, even if they leave the company.
6. Fully portable without any rate increase for life. A huge benefit for employees. Great for the bottom line, everyone wins.

**Would you like me to build that website for you sir?**

**Here is the process if they say yes.**

1. Great, here is what we need to do.
2. I am going to email you a Group Authorization Form. You can fill this out online.
3. You can electronically sign this or print it out, sign it and scan it back to me via email.
4. I will download the form and send it directly to our HQ in Oklahoma.
5. One of our group specialists will call you within 24 hours to verify I have spoken to you, and confirm you have given your OK.
6. They will double check your name and address and confirm the business name and address and then build your site.
7. Once you give the OK, we can have everything done in 24-48 hours.
8. I will call you back and we are set to enroll

**How does that sound?**

Great! What is your email, if you have time, you can give me the information and I can fill out most of this for you in the next minute, what is easier for you?

**Behind the Scenes:**

1. You can always add legal later
2. We have 60 days to get three people to sign up
3. If only 1 employee signs up, or even if nobody signs up, the website is still there and is not taken down. The company keeps the group rate.
4. If only 1-2 employees sign up, you will be paid as earned rather than one year in advance.
5. Once you are paid as earned, then you will always be paid as earned on those 1-2 people. All of the other employees who may or may not enroll will be paid a year in advance.
6. We use this simplified process to get our foot in the door, maybe get a few signups but then set up the lunch and learn later where we can use paper sign up forms and offer incentives and drawings for everyone who signs up that day. We will add two entries for all employees who signed up on their own. We can do anything like this
7. A company can split up and have two websites. Here is a sample of what they receive
   1. [www.legalshield.com/info/companyanew](http://www.legalshield.com/info/companyanew) This is for payroll deduction
   2. [www.legalshield.com/info/companybnew](http://www.legalshield.com/info/companybnew) This is for self-pay
8. When you fill out the group authorization form, you indicate the rate and method on the form. The only way the form can be received is uploaded from your back office of Legal Shield which is
   1. [www.online.legalshield.com](http://www.online.legalshield.com)
   2. Click on the button that says MY BUSINESS
   3. You will see a link that says UPLOAD DOCUMENTS
   4. You will get confirmation that it was received, or you can call to double check.
9. If a business wants some employees to self-pay and others to have payroll deduction, we can do that. Get the self-pay site in place first and then we need at least 5 employees who want payroll deduction. If 5 employees desire payroll deduction, then a special link will be created, and all future employees can choose between self-pay or payroll deduction in the future.
10. When filling out the form, the authorizing agent is the ID Shield or Legal Shield associate. The plan admin or authorizing officer is the owner or HR person, or someone who is a part of the company.
11. The HR person or owner can also be an associate, but they can’t authorize their own group. But you can indicate on the form as much as a 99% and 1% commission split where the owner gets 99%.