Hi, I’m Jay Moore, Director of Marketing for SmallBiz. So far in this training, we’ve covered 3 SmallBiz plans in great detail, we’ve reviewed several ways to prospect, network, and set appointments. So now what? Well, you’re going to need marketing and presentation materials for your decision maker meetings and marketing programs to reach more prospects.

Every marketing tool that we develop has been vetted by our sales and marketing teams and field tested by some of the top sales agents in the company. We also take a “less is more” approach to marketing, opting to focus on a curated assortment of marketing collateral that has a track record of success in the field.

So let’s check out some of the tools that we’ve created for your marketing arsenal...

**Prospecting Sheet**

To help start a conversation, solicit interest, and sell the concept of our services, we’ve created a double-sided prospecting sheet that can be shown or given to a business owner. Many of our Associates will use this sheet in introductory meetings, email, and when cold calling.

The front of the sheet makes a strong brand statement, asks several questions that are written in a way to solicit an agreement that the business has unmet needs, and then showcases some of the most powerful benefits of our plans.

On the back of the document, a powerful “before and after” visual provides the business owner with an illustrative example of what their business would look like after our services have provided a wall of protection around their business. The “before and after’ graphic has undoubtedly been one of, if not the most, successful presentation aides used over the years.

At this point, you’ve introduced the brand, generated agreement that the business has unmet needs, provided a quick overview of the services, and shown them what their business could look like with our help. Now it’s time to get more specific in exactly what our service does. The bottom half of the prospecting sheet shows how LegalShield and GoSmallBiz can help protect and grow their business.

Once both sides of the sheet have been covered, one of two things will happen. One, the business owner will be ready to buy and will ask about plans and cost. Two, they are extremely interested but would like for you to go into greater detail about how the program works. In both situations, it will be up to you as to how you would like to proceed. You may choose to ask a few more qualifying questions to identify the best plan for the business, state the price, and complete the membership agreement on the spot. Or, you may feel the need to go into a more detailed presentation using one of the other marketing tools such as the Flip Book. Ultimately, where you take the conversation will be up to you, as each situation will be different.
**Flip Book**

Once you’ve established rapport with a business owner, and they’ve indicated they would like to learn more about our services, you’re going to need presentation materials. For the purpose of this training, let’s start by reviewing the SmallBiz Flip Book, which is by far and away the most thorough presentation aide available in our marketing arsenal.

The Flip Book is designed to be used in a one-on-one personal setting, as a PowerPoint for large group presentations, or as an online presentation aide. A high resolution PDF can be downloaded for free or you may purchase a professionally printed and bound booklet through our online supply store.

The Flip Book is organized into four sections, with the first section addressing the question: “why protect and grow your business,” followed by an interactive business needs analysis. The first two sections are designed to identify the business owner’s needs and to set the stage for an effective presentation of our services. The booklet concludes with impactful presentations on how LegalShield and GoSmallBiz can help protect and grow your prospect’s business.

To see how you might use the Flip Book in a real life scenario, let’s watch the following role play exercise.

As you saw in the role play, the Flip Book helps you identify the needs of the business and then helps you show them how our services can help protect and grow their business. We encourage you to use the Flip Book as a practice aide as you continue to refine your presentation skills. Many agents have taken this approach to master their presentation to the point where they no longer rely on the Flip Book during a presentation; instead, opting to have a conversation with a business owner with limited marketing materials in sight. With practice, you will find an approach that best fits you and your approach to the Small Business market.

**Brochure**

When you need a more concise presentation aide, and one that can be left behind with the business owner, we recommend using the SmallBiz Brochure.

The brochure is designed to be used in an up-close, one-on-one personal setting. The front cover introduces our SmallBiz brand accompanied by our concept statement of “services built around your business.”

Once opened, you can show the business owner how our services can protect and grow their business. On the left panel, the focus is on the legal benefits provided by LegalShield. And on the right panel, the focus is on the business services provided by GoSmallBiz. Each benefit is presented in a bullet point format followed by a brief explanation.

Once you’ve discussed the business owner’s needs, identified the areas of the service that they’re most interested in, and showed them how our service can fulfill those needs, you should have enough information to make a plan recommendation. When you’re ready to do so, simply turn to the back panel of the brochure where you’ll find the plans and pricing table.

At this point, you might say something like, “Mrs. Brown, based on the needs that you expressed and the service plans available to me, I would strongly recommend we go with the Pro plan. On the legal side, this plan addresses your document and contract review needs and on the business side, it provides you with the sales
and marketing resources that you’re currently lacking. If this makes sense to you, we’ll go ahead and get you signed up now so we can get those needs addressed.”

So again, the SmallBiz brochure makes an excellent up-close, one-on-one presentation tool. And on those occasions when a business owner would like some more time to think things over, the brochure makes a great leave-behind tool as well. Professionally printed and folded brochures are available through our online supply store.

**Product Sheet**

Next up is the SmallBiz Product Sheet. This tool takes highlights from the prospecting sheet and the brochure, providing you with a versatile and concise presentation aide. It can be used in one-on-one presentations, large group presentations, online presentations, and can be emailed or left behind with a business owner.

The front of the sheet makes a strong brand statement, asks several questions that are written in a way to solicit an agreement that the business has unmet needs, and showcases the services that address those needs. To pull it all together, the compelling “before and after” visual provides the business owner with an illustration of what their business would look like after our services have provided a wall of protection around their business.

At this point, you’ve introduced the brand, generated agreement that the business has unmet needs, provided a quick overview of the services, and shown them what their business could look like with our help. Now it’s time to make a plan recommendation. When you’re ready to transition to that part of the conversation, simply flip the sheet over and point to the plan that you’re recommending as you explain the basis for the recommendation.

For example, it might sound something like, “Mr. Thompson, based on the needs that you expressed and the service plans available to me, I would strongly recommend we go with the Essentials plan. Like you said, being that you’re just starting up, you’re going to have a lot of legal and business questions. You also mentioned that you’re getting ready to sign a few agreements that you would like a business attorney to look at first. And you also wanted some help with a new website and putting together a business plan. All of those needs can be addressed for $59 per month with our Essentials plan. If this makes sense to you, let’s go ahead and sign the paperwork so we can get those needs addressed.”

So again, the SmallBiz product sheet is great for one-on-one presentations, large group presentations, online presentations, and can also be emailed or left behind with a business owner. You can download the PDF version in our Associate support website or you can order professionally printed sheets through our online supply store.

**New Member Activator**

Congratulations! You just made a sale. So now what? Is that it? Of course it isn’t, we need to make sure that your new client knows how to get started with our great service!

The number one reason why Small Business Members cancel their membership is that they never used it! And if the membership isn’t used, it just becomes another line item on a billing or expense statement. It’s our
responsibility to make sure we’re immediately addressing the reasons why they purchased the plan. If they needed a contract or document reviewed, we need to help them call their Provider Law Firm right away. If they had a question about their marketing plan, they need to make sure they submit those questions to the business consultants’.

To help you and your client get started with the service, we’ve developed the New Member Activator brochure. The Activator provides the new member with simple, step-by-step instructions on how to contact their LegalShield Provider Law Firm, their GoSmallBiz consultants, and how to access their GoSmallBiz software applications.

There’s also a perforated section that prompts you to have a conversation regarding the initial follow up meeting, employee benefits, and referrals. We’ve found that the best time to ask for referrals is immediately following a sale and on your initial follow up meeting. We’ll discuss the transition from a SmallBiz plan sale to employee benefits later in this training.

This brochure should be reviewed and completed with the business owner immediately following the sale of a SmallBiz plan. To get your professionally printed New Member Activators, visit our online supply store.

For this, and all of the other marketing tools, we provide additional training, tips, and suggestions on our Associate support website. We’ll cover this and other Associate support topics later in this training.