

# New RightBRIDGE® Prospecting Module

RightBRIDGE identifies the best prospects and the right time to call them.

In the same way RightBridge identifies the best sales opportunities in a producer's book of business, the Prospecting Module can identify and facilitate productive, intelligent and systematic prospecting. RightBRIDGE manages "fuzzy" follow-up times and presents specific opportunities and reasons to call. The prospect calls can be organized into an easy-to-use call list.

A financial professional can upload their Project 200 Spreadsheet right into the prospecting module.

## Callback Score

Using the Call Back Score a producer can search for the best prospects to call on a given day or week.

## Quick Input

Adding prospects to RightBRIDGE is quick and easy with all the key information on one screen with minimal number of "clicks".

Name	Phone	Top Suggestion	% Rel.	Detail	Source	X Call Score	Call Type	X Call Date	Contact Count	Call List
Tamra Siler	(442) 751-4852	Retirement Plans	100	Income Replaced: Unknown		100	On	6/25/2012	1	Call List
Kris Tomlinson	(514) 484-3910	Term Insurance Upgrade	100	Days until expire: 82		100	Around	6/25/2012	1	Call List
Julene Large	(253) 581-2996	Add life for survivor needs	100	Shortfall: \$2,000,010		100	On	6/22/2012	1	Call List
Normand Swanson	(695) 720-3696	Term Insurance Upgrade	100	Days until expire: 128		100	Around	6/25/2012	1	Call List
Seth Jensen	(817) 555-5525	Life Insurance - Estate Plan	100	Known Assets: \$2,146,097		20	Not Before	6/28/2012	1	Call List
Bill Smith	804-234-3923	Retirement Plans	100	Income Replaced: 89 %	Referral	20	Around	6/4/2012	1	Call List
Trinity Olivares	(464) 282-4778	Term Insurance Upgrade	100	Days until expire: 155		20	Not Before	6/29/2012	1	Call List
Peter Hurtado	(251) 233-3569	Retirement Plans	100	Income Replaced: 23 %		10	On	6/29/2012	1	Call List
Kalyn Schweitzer	(607) 710-2316	Retirement Plans	100	Income Replaced: 46 %		20	Not Before	6/30/2012	2	Call List

## Call List

A financial professional can generate a Call List of all prospects and clients for a given day or week complete with reasons and details.

## Prompts for Key Follow-up Information

The RightBRIDGE Prospecting module prompts financial professionals for next step or follow-up. Three “clicks”, a short note and on to the next prospect. The system will also prompt the producer for next most important data to be collected.

## Top Suggestions

Top Suggestions are listed for prospects just like clients in RightBRIDGE.

The screenshot displays the 'Prospecting Follow-up Information' section for prospect Bill Smith. It includes a 'Next Follow up date' set to 'Around - 6/30/2012' and a dropdown menu for 'When to follow up next?' with options: 'Around', 'On', 'Before', 'Not Before', and 'No Date'. The 'On' option is selected. Below this, there are sections for 'Financial Dependents' and 'Contact History'.

Date	Note	Result
5/31/2012	Met Bill at golf outing for United Way	No Action

## Prospect Follow-Up

Most prospecting follow-ups are “fuzzy” points in time. “Call me in two weeks”.

### 3 Scheduling Options

- On a specific date
- Around a specific date
- Not before a specific date

The screenshot displays the 'Why Addtl life for survivor needs?' section. It lists several reasons with their corresponding impact percentages:

The client has 36 % of the recommended life insurance based on their age and income. The client's total life insurance is \$450,000 this is 36 % of the minimum recommended amount of \$1,260,000 using a multiple of 10 x the client's income based on the client's age and income.	+42%
Client is age 44. The client's Age 44 is between the age of 18 and 45 where this suggestion becomes increasingly more relevant.	+14%
The client will have an age change in 12 days using age nearest. The client's birthday is 12/12/1967. In 12 days the client's age using the age nearest method will be 45. This may be an age where a significant rate increase will occur. This may provide an opportunity to discuss this suggestion while rates are lower than they will be after the age change.	+12%
The client may need an additional \$810,000 of insurance based on their age and income. The additional need of \$810,000 is based on current life insurance of \$450,000 compared to a recommended amount of \$1,260,000 using a multiple of 10 x the client's income based on the client's age and income assuming 3 dependents.	+10%
Assets or stated net worth are (\$1,340,000). The amount of a client's assets are a key indicator of a client's life insurance needs. The client's assets of \$1,340,000 are a positive indicator for this suggestion.	+10%
The client's income is a positive indicator (\$126,000). The client's income is an indicator of a greater than average premium paying ability.	+5%

## Reason Text™

RightBRIDGE delivers unique reason text™ for each suggestion explaining why a specific topic meets a prospect's needs complete with all the detail and needs-based calculations.