

# **KickMail™**

## **Specifications**

### **for**

## **Direct Sales**

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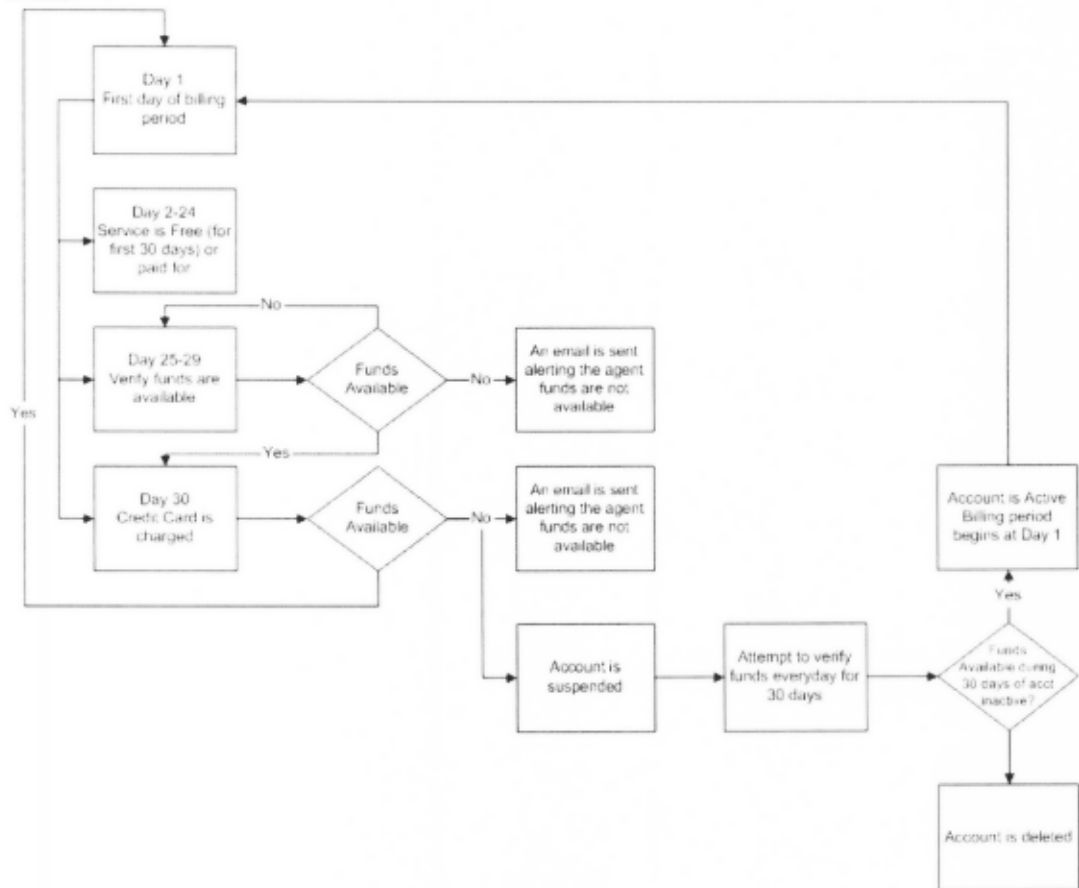
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## Module I: First30

### Diagram



Pri-QS-Diag.bmp

### Overview

The First30 module will be designed to allow non-registered users (new agents or recruits) to send KickMail to prospective clients (friends and family). The trainer who currently has a KickMail account can offer the First30 service to his recruit to help him establish a client base. An introduction letter is sent from the trainers KickMail account, but the email is "from" the recruit. After the contact receives the email, the contact can click "contact me" to set up an appt with the trainer and recruit. The trainer is included in the meeting, because recruit does not have necessary licenses to sell insurance and other products.

Functionality	Availability	Comments
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Attachments	N	
Subject		Recruit's First and Last Name: Subject line
Pre-Sets	N	
Editable	N	The text in this template is not editable due to compliance issues. The text and subject line is pre-populated and cannot be edited.
Document style		First30 Uses 2 document styles – Side kickers (3 elements on right) or bottom kickers (2 elements across bottom). The elements are maintained in Admin>First30 by KickMail.
Kickers		First30 Kickers are maintained in Admin by KM
Document Rotation	Y	Doc Rotation maintained by KickMail. See <a href="#">Admin&gt;Doc Rotation</a> for more details.
Document Compliance	On	See <a href="#">Compliance Audit</a> for more details

### Scripts

Name	Action
???	Every 24 hrs, a script will run to check the validity of the hyperlinks in the kickers.  This will be implemented post-pilot. In the interim, the links will be check manually on a daily basis.
???	Non-Respondent Follow up script  This will be implemented with the pilot.
???	To verify the validity of the email address on Screen 1. Any incorrect address will be highlighted in red for the user to correct.

### Post Pilot

Kickers will include sales tips in the follow-up email.

## **Section 1: RECRUIT INFORMATION (AND RESEND)**

The Up-line rep will log into his KickMail account and choose FS. On the First30 main screen, the Trainer can do one of three things. He can enter information for a new recruit, edit information for a previous recruit, or edit contact information for a recruit.

- If starting new for a new recruit, he will enter the required new recruit information, then click Continue.

- If adding more contacts for a previous recruit, he will enter the first and last name of the recruit, then click continue. The system will append contacts to the recruits group.
- As each group of First30 emails are sent, the Recruit could receive an undeliverable message. This might happen if the email address is incorrect. If this happens, Recruit should first verify email address. If email address is incorrect, recruit should correct it in the contact list, and then resend it.

**Fields**

<u>Field Name</u>	<u>Req'd</u>	<u>Field Size</u>	<u>Data Type</u>	<u>Format</u>	<u>Merge Field</u> <u>Y or N</u>	<u>Other</u>
Recruit First Name	Y				y	First name and last name = group name in contact list
Recruit Last Name	Y				y	Recruit is added to Trainers contact list (but, not Recruit's group)
Recruit email address	Y					
Retype email						
Recruit Phone						Mask (XXX) XXX-XXXX
Contact Group Name						Auto create

## Proposed Screen Sample

**PRIMERICA**  
a group

document menu | tracking | edit content | edit profile | help | admin

Welcome back, Ed!

**Top 10 Contacts**

Download Opportunity List

SHOW ALL | SHOW GROUPS

Enter New Recruit Info:

First Name \*

Last Name \*

Email \*

Phone \*

\* Required field for first time use.  
† Required for subsequent uses

Continue

**Top 10 Contacts**

Carlton Rhodes (33)

Nathan Milam (17)

Mark Beaumont (4)

Karen Williams (2)

webmaster@kickmail (1)

NEW CONTACT | IMPORT

**Edit Contact Information:**

Select the appropriate Recruit's group from the drop down menu.

▼

Bill Smith Grp ▲

Leslie Jones Grp

Lisa Philips Grp

Andrew Dice Clay Grp

Arnold Schwartz Grp ▼

Pri-QS-Screen1.bmp