

Emani Calling Portal — Quick Start Guide

Use this as your 2-minute walkthrough. Follow steps in order.

The screenshot shows the Emani Calling Portal interface. A white error message box is displayed in the center: "innercirclelink.com says Invite failed: not_found" with an "OK" button. The interface includes a header with "Header + Export/Lock", a main dashboard with statistics (Total Leads: 1, Today Leads: 1, Qualified: 0, Moved Forward: 0), and a "Send Sponsor Email (one time)" button. Below the dashboard is the "Add New Lead" form with fields for First Name, Email, Phone, License (Unknown), and Notes (Kimora Day-in-the-Life Lead). The "Tracking Pipeline" section shows a table with columns: Name, Email, Phone, Licensed, Stage, Quick Update, Notes, Updated, Payout, and Actions. The table contains one row for "Kimora Link" with email "kimora@thelegacylink.com", phone "6469459530", license "Unknown", stage "New", and a "Send Sponsor Email" button. The "Live Call Script (Use Exactly)" section provides a script for calling, including an opener, two questions, service examples, a qualification gate, and a close. The "Caller SOP & Pay Model" section lists guidelines: 5 days/week, 9AM-9PM CST, goal of 5-15 calls/day, speed-to-call target of 5 minutes, flat pay of \$50/day, and referral-based pay of \$300 per lead that moves forward.

1 Header + Export/Lock

2 Add New Lead form

3 Send Sponsor Email (one time)

4 Update stage after each call

5 Live script section

innercirclelink.com says
Invite failed: not_found
OK

Emani Calling Portal
Lead-to-Onboarding tracking for The Legacy Link

Export CSV Lock

Total Leads
1

Today Leads
1

Qualified
0

Moved Forward
0

Payout Earned
\$0

Hours Available Today 1:00:00 Used for daily accountability + pay tracking.

Add New Lead

First Name Email Phone License Unknown Notes Kimora Day-in-the-Life Lead

Add Lead

Tracking Pipeline

Move Forward definition: lead is counted as moved forward when they are approved and start onboarding.

Name	Email	Phone	Licensed	Stage	Quick Update	Notes	Updated	Payout	Actions
Kimora Link	kimora@thelegacylink.com	6469459530	Unknown	New	New	Context	2/22/2026, 3:58:28 PM	—	<button>Send Sponsor Email</button> <button>Delete</button>

Live Call Script (Use Exactly)

Opener: "Hey [Name], thank you for your interest in joining our insurance agency. This will take less than 3 minutes. I have two quick questions to see if you qualify, and if you do, we'll move to next steps."

Question 1: "How much time can you devote to the insurance business each week?"

Question 2: "Are you willing to do one hour of community service each month?"

Service examples: soup kitchen, church/mosque volunteering, or donating clothes to Salvation Army.

Qualification gate: at least 10 hours/week, willing to serve, and not located in New York.

Close: "Perfect — I'm sending your next-step email now. Please complete it right away so we can move quickly."

Caller SOP & Pay Model

- 5 days/week, calling window 9AM–9PM CST
- Goal: 5–15 calls/day
- Speed-to-call target: first attempt within 5 minutes
- Flat pay option: approx \$50/day (hour/shift based)
- Referral-based option: \$300 per lead that **moves forward** (approved + onboarding started)
- Use **Send Sponsor Email** button once lead is qualified

5-Step Workflow

- 1) Open portal and review New leads.
- 2) Call immediately and set Licensed/Unlicensed.
- 3) Move stage: Called → Connected → Qualified.
- 4) Click Send Sponsor Email ONCE (button turns to Email Sent).
- 5) If row shows Approved • Stop Calling, do not continue follow-up.

Definitions + Tracking

- Moved Forward = Approved + Onboarding Started.
- Payout badge +\$300 appears when name matches approved policy list and onboarding is started.
- Log Hours Available Today at the start of each shift.
- If a lead is approved, row turns green and should be removed from call cycle.

Notes: - SUPPORT ONLY -

Daily Success Checklist

- ☐ Start shift and set Hours Available Today
- ☐ Work all New leads first
- ☐ Keep notes short + clear
- ☐ Send sponsor email only for qualified leads
- ☐ End shift with stage updates completed