Hi Nobesuthu,

Thank you for your email and for outlining the action items following our meeting. Please see feedback and updates on each point below:

1. API Integration Request & Documentation
The API integration request has been formally added to our Development Team's worklist. As discussed, there may be capacity constraints within the Dev environment, but we will keep you updated on progress and timelines as feedback becomes available.
Once the API setup is complete, we will provide the relevant API documentation, endpoint details, and login credentials required for the integration. I will share these with you as soon as they are finalized and ready for testing.

2. Lead Requirements & Client Qualification Criteria

Most importantly, all clients must explicitly opt in.
We cannot have a situation where a client queries where their information was obtained, requests disclosure of the referring party unexpectedly, or raises a POPIA-related concern. Clear consent is therefore non-negotiable.

From a product perspective:

- **Minimum income requirement:** R12,500 per month.
  That said, we have observed that clients earning at or very close to this threshold are statistically more likely not to proceed with the policy or to lapse early. Where possible, targeting slightly higher income brackets tends to improve conversion and retention outcomes.

To ensure optimal engagement and booking success, we require the following information on all submitted leads (the more detail provided, the better our Booking Agents can position the discussion):

- Client age
- Employment status
- Minor children (if any)
- Property ownership
- Vehicle ownership
- Other assets (investments, collectibles, etc.)
- Marital / relationship status
- Client location (full address preferred; alternatively area + province)
- Appointment type (single consultation, spouse/partner, or family consultation)

This information allows our team to tailor the approach and "hook" strategy appropriately.

3. Process Flow

Once a qualified, "tee'd up" lead enters our system:

1. The lead is automatically allocated to a Booking Agent.

2. The Booking Agent contacts the client to schedule an appointment with a Testamentary Consultant (TC) for the will discussion, LPP quote, and potential sale.

Contact timelines:

- Leads received before 12:00 are typically contacted the same business day.
- Leads received after 12:00 are generally contacted the next business day (subject to volume, same-day contact may still occur).
- Booking Agents operate **Monday to Friday, 08:00–17:00**. No weekend or after-hours calling takes place.

Contact attempts:

- Agents will attempt contact approximately 5–8 times over consecutive business days before classifying a lead as unreachable.
- Clients receive email communication after each contact attempt.

Consultations:

- TC consultations are scheduled Monday to Friday, with the last appointment slot at 19:30.
- While some TCs may make themselves available on Saturdays, this is discretionary and cannot be advertised, as availability is not guaranteed. Saturday slots are rare and typically fill very quickly when available.
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3. Generic Booking-Agent Script

This has been requested internally. I will forward the generic script as soon as it is made available to me.

4. Co-Branding / White-Label Eligibility

To be considered for a white-label solution, an account must produce an average of **180 sales per month over a continuous six-month period**. Once this performance threshold is met and sustained, a white-label option can be formally evaluated.

Please let me know if you would like to set up a follow-up session to walk through any of the above in more detail. We will continue to provide updates as progress is made on the development and documentation items.