
Prime Client Outreach™
10-Step Growth Implementation Flow
1
Identify Challenges
• Assess agent's business obstacles and growth gaps.
2
Analyze the Book
• Review account totals, client categories, and asset m
3
Define 12-Month Goals
• Establish measurable revenue, retention, and expansion targets
4
Select Outreach Strategy
• Align SMS, phone, email, and mail campaigns with growth objectives
5
Activate Dedicated Outreach Line
• Launch a branded "Client Relations Manager" phone line
6
Configure POL Access
• Designate the Client Relations Manager in POL for outreach coordination
7
Finalize Service Plan
• Confirm service mix, timelines, and execution schedule
8
Launch & Execute
• Deploy Prime Client Outreach services across client segments
9
Measure & Review
• Track FNAs, conversions, managed conversions, and referrals
10
Optimize & Grow
• Refine strategy, scale efforts, and increase production

Prime Client Outreach

10-Step Growth Implementation Plan

Frequently Asked Questions (FAQ):

1. What is Prime Client Outreach™?

Prime Client Outreach™ is a structured client relationship and marketing support program designed specifically for Primerica agents and leadership. We help agents systematically reconnect with their existing book of business through phone, email, SMS, and personalized mail campaigns to increase retention, reviews, referrals, and production.

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2. Who is this program designed for?

This program is ideal for:

- Agents with large dormant books
- Regional Vice Presidents (RVPs)
- Senior Vice Presidents (SVPs)
- Senior National Sales Directors (SNSDs)
- Agencies managing hundreds or thousands of term life or investment accounts

If you have clients you haven't spoken to in months or years, this program is for you.

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3. What problem does this service solve?

Many agents are overwhelmed with compliance, recruiting, production, and servicing responsibilities. As a result, client follow-up suffers. We solve that by professionally handling structured outreach so agents can focus on advising, closing, and growing.

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4. What types of outreach are included?

We offer a full suite of client engagement services:

- Dedicated outreach phone line
- Live call or voicemail outreach
- Personalized client review emails
- SMS graphical birthday cards
- 90-day SMS review reminders (investment clients)
- Puzzle mailing campaigns (insurance-only clients)
- Golden USB key mailing (VIP investment clients)
- CRM data cleanup and organization

5. How does the 10-Step Growth Implementation process work?

We start by analyzing your book of business and goals, then design a customized outreach strategy. After setup (including dedicated phone line and POL configuration), we execute campaigns, measure engagement, and continuously refine for better results.

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6. Will clients know someone else is contacting them?

No. All communication is branded to the agent and Primerica standards. Outreach is presented as coming from your office and your Client Relations Manager. The goal is to strengthen your relationship — not replace it.

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7. What results can I expect?

Typical outcomes include:

- Increased Financial Needs Analysis (FNA) appointments
- More managed account conversions
- Higher client retention
- Stronger 90-day review consistency
- Reactivation of dormant life clients
- More referrals

The program focuses on relationship-based growth — not cold marketing.

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8. How do the mailing campaigns work?

For example:

Puzzle Mailing (Insurance-Only Clients)
A personalized letter, magnetic business card, FNA coupon, and a large puzzle piece labeled “Life Insurance” designed to spark curiosity and encourage a full financial review.

Golden USB Key Mailing (VIP Investment Clients)
A personalized letter, magnetic business card, FNA certificate, and a Primerica-branded 4GB gold USB key packaged professionally to reinforce value and retention.

9. Is this compliant with Primerica policies?

Yes. We follow proper branding guidelines and can coordinate setup within Primerica Online (POL). Agents maintain control of advisory conversations and production responsibilities.

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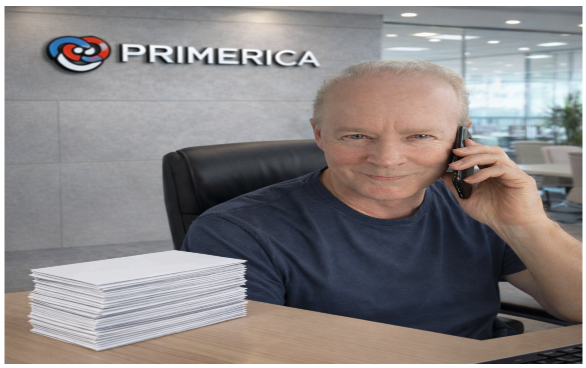
10. How quickly can we launch?

Most agents can be fully operational within 1–2 weeks once goals and service selections are finalized. From there, outreach campaigns can begin immediately and scale over the next 12 months.



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Questions or Notes: