

Instant Meetings

How It Works

1 AGENT SETUP

- Completes Onboarding
- Requests to receive Instant meetings
- Agent gets added to Instant Meetings
- Pays for meeting

2 GOING LIVE

Each morning we check agent's calendar

- Agent is Active?
- Any free blocks > 45 minutes?

4 minutes before free block of time:

- Text Agent to opt in to receive calls during "Free" block
- Texts back "1" to opt in

*There is no guarantee number of instant meetings you will receive during your available time slot

3 CONSUMER ON PHONE

- Rep qualifies consumer
- Confirms Zip
- Agent receives automated voice message offering the call
- Agent must press "1" to accept call
- First agent to accept is connected with the consumer
- Agent also receives text message with consumer name and phone number

4 POST CALL

- Licensed agent communicates on ALL Instant Meetings received via notes and dispositions
- QA team reviews Instant Meetings against agent's notes and disposition
- Scope will be available in Portal for download
- Call will be recorded, stored, and available for review in the Portal

5 QUALITY INSTANT MEETING: Billable

- Successful transfer to the agent

6 CURRENT PRICING

- Each Instant Meeting will cost \$39
- Credits can be purchased at any time via our Buy More feature or Agency Funding

Questions?

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