

# SHIELD NATION

**Small Business  
Training Manual**

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# THE MANUAL'S PURPOSE

## TRAINING BOOKLET

Accessible online. Features a Business Strategies page covering these areas:

- Top marketing strategies used to FIND a small business customer
- Top methods used to CLOSE a small business plan

## PRODUCT PAGES

Detailed product page for EACH plan or supplement with the following information:

- Engagement questions used to create interest and assess need
- Objections and how to overcome them
- The top benefits or hot buttons
- Most used tool(s) for presenting
- A list of ideal customers

THIS IS VERY VALUABLE  
INFORMATION TO HELP YOU RECRUIT  
HIGHER CALIBER PROFESSIONALS  
AND TO INCREASE YOUR SALES  
EFFECTIVENESS. I AM SO EXCITED TO  
EXPAND YOUR SUCCESS.  
LET'S GROW!

# TOP METHODS & MARKETING STRATEGIES

## METHODS

Used to CLOSE a small business plan:

- 1 One-On-One Presentation ... 67%
- 2 Zoom Presentation ... 40%
- 3 Phone Presentation ... 20%
- 4 3-Way Call ... 7%
- 5 Lunch n' Learn ... 7%
- 6 Private Business Reception ... 3%

## MARKETING STRATEGIES

Used to FIND a small business customer:

- 1 Get Referrals ... 87%
- 2 Call Warm Market ... 77%
- 3 Networking Groups ... 57%
- 4 Social Media ... 33%
- 5 Call Cold Market ... 33%
- 6 3 Foot Rule ... 10%
- 7 Trade Shows ... 7%
- 8 Live Events ... 3%

# SMALL BUSINESS ESSENTIALS PLAN

## Engagement questions used to create interest and assess need

- What keeps you up at night regarding your business?
- If you could talk to an attorney anywhere in the country, on any subject matter, on an unlimited basis, and you didn't have to worry about cost, would you call an attorney more often?
- Debt collection issues; contracts reviewed.
- What is your business structure? Do you have a partnership?
- What are your biggest challenges, or what inspired you to start your business?
- Tell me about your business: issues, problems, etc.
- Number of employees, HQ address.
- If you could have access to a top law firm to get advice before you make any business decisions, would it make a difference?
- How much do you spend on attorney fees each month?
- Do you have the LS App for your Business?
- How do you get help answering legal questions or resolving legal issues?
- Have you ever wanted to call an attorney and did not due to cost? How do you handle bad debt when you aren't paid by a client or customer?
- Do you currently have an attorney? What types of things do you use them for? Would you ask them more questions and get advice more often if it wasn't so expensive? How many employees do you have? Who are your customers? Do you do business out of state?
- Have you looked at Legal Shield yet to help you protect and grow your biz?
- How is your business going? (Get them talking!) How did you start your business?
- Have you ever hired a lawyer for something related to your business?
- What are your concerns as a small business owner? Do you have a large legal defense fund at your disposal?
- Tell me how you started. What's your top goal this year?

## Objections and how to overcome them

- "I already have an attorney/lawyer": Great, let's talk about it as a supplement to that attorney--instead of not calling and be charged.
- "Timing, cost right now": What would it cost you without the plan?
- "I don't have legal issues or need a lawyer": 101 Reasons (legal plan with HBS helps owner make better decisions).
- Oh, I tried legal shield before, and they were no help.
- "Can I think about it, and could you send me something?" Ans = Sure but exactly what part of the plan were you needing clarification on so I can send you what you're looking for to make an educated decision in protecting your business today?

# SMALL BUSINESS ESSENTIALS PLAN

## Top benefits or hot buttons

- Employee handbook, contract review, unlimited access
- Debt collection; advice
- Does business in state/no employees/partnership
- What is your biggest challenge
- Allows the member to have legal access, which most business owners do not have
- Affordable, comprehensive, peace of mind
- Consultation
- Legal advice, document review, letter and phone calls
- Contracts and debt collection
- Protection, ability to ask unlimited questions and get advice on anything, business expense write off (same on all)
- Affordable access to attorneys for advice & consultation without getting a bill
- Talk to an attorney
- Advice & consultation, contract review, collection letters
- Are you concerned with lawsuits affecting your business or everyday operation?
- Super affordable: unlimited consultations w/research, contract review
- Unlimited consultation, contract review, debt collection

## Most used tool(s) for presenting

- Flat sheet/flier
- Business plans overview
- PBLs overview video
- I present Essentials/Plus/Pro and do a consultative selling
- Small business white paper
- 101 Reasons
- Small biz fact sheet
- Determining the customer's needs and telling stories around that; following up with a brochure
- Biz comparison sheet
- In person presentation

## The ideal customer

- Start Up w/ EINS, whereas the business is simply a pass-through entity
- Retail or franchise
- Manufacturing
- CDL driver
- Daycare owner
- Lawncare owner
- Contractor
- IT services
- Chiropractor
- Fewer than 10 employees
- Home healthcare
- Restaurants
- Consultant
- Pest control
- Automotive repair
- Media marketing
- Realtor

# SMALL BUSINESS PLUS PLAN

## Engagement questions used to create interest and assess need

- Are you concerned about lawsuits? Do you have a lot of contracts? Do you wish you could ask random questions and get a definitive answer?
- What keeps you up at night regarding your business?
- If you could talk to an attorney anywhere in the country, on any subject matter, on an unlimited basis, and you didn't have to worry about cost, would you call an attorney more often? Do you do business outside of your state?
- Do you want to secure your hard work with the right protection?
- Would it be helpful to have a manager contact the law firm?
- Are you concerned about being sued?
- We have collection letters for \$10 each.
- Our goal is to help 10,000 households become successful employers over the next 10 years. Then I listen.
- Have you looked at LegalShield yet to help you protect and grow your biz?
- Have you ever hired a lawyer for something related to your business?
- What are your concerns as a small business owner? Do you have a large legal defense fund at your disposal?
- Tell me about your business: issues, problems, etc.
- If you could pick up the phone, would you? How much are you currently paying in attorney fees annually?
- How many people will call? Are you concerned about being sued? Contract drafting?

## Objections and how to overcome them

- Rarely call attorneys, program is set up to be proactive and preventative.
- "I have a business attorney": I review the benefits of our plan.
- Not very good customer service.
- No longer have to roll the dice or google.
- Cost.
- Not the right time, don't see their businesses growing into a significant enterprise = expense (I drop them in my contact manager).
- Even at 99 a month you save time & money. Another thing I really appreciate about LegalShield is that our attorneys are held accountable to provide you with preferred member service.
- "I already have those services": To give you total peace of mind that you have the best service right now, would you give me 15 minutes to show you what we're offering?
- "Can I think about it, and could you send me something?" Ans = Sure but exactly what part of the plan were you needing clarification on so I can send you what you're looking for to make an educated decision in protecting your business today?
- "I have an attorney": No one is calling their attorney when they might want to because they don't want the bill. When they understand this isn't to replace them but to supplement what they already have, they get it.
- MLM, bad reviews with law firm, not using attorneys, etc.

# SMALL BUSINESS PLUS PLAN

## Top benefits or hot buttons

- Lawsuits, contracts, employee handbook, trademark
- Access to the additional features for a flat rate
- Audit coverage, employee handbook, contract review
- Need 1
- Debt collection, contract review
- Does business out of state/desires several designated users/debt collection issues
- Same as above but allows them to have trial defense supplement
- Protection for all states in the US
- Value, price
- Manager access, collection letters
- Contracts and debt collection
- Hiring-firing/out of state vendors/collections
- Protection, ability to ask unlimited questions and get advice on anything, business expense write off
- Collections, questions, hiring & firing employees
- Consultation, capital readiness, document review & lawsuits
- Employees handbook
- Advice & consultation, custom contract drafting, collection letters
- Are you concerned with lawsuits affecting your business or everyday operation?
- Unlimited consultations, contract review, letters and phone calls
- Unlimited consultation, number of users, employee handbook
- Affordable access to attorneys for advice & consultation without getting a bill

## Most used tool(s) for presenting

- Flat sheet/flier
- Business plans overview
- PBLs overview video
- I present Essentials/Plus/Pro and do a consultative selling
- Small business white paper
- 101 Reasons
- Small biz fact sheet
- Determining the customers needs and telling stories around that; following up with a brochure
- Biz comparison sheet
- In person presentation

## The ideal customer

- Roofing or contractor
- Agent
- Pharmacy
- Home health care
- Insurance or broker
- Consultant
- Independent contractor/salesperson
- Grocer
- Company doing business mostly in state with multiple employees
- Training specialist or business developer
- Auto mech
- Real estate agency
- Manufacturing
- Advertising, social media
- Staffing co
- Biz 2-5 years old; beginning to onboard employees; seeking business financing, credit; greater degree of alarm regarding lawsuits; branding interests (intellectual property concerns), regardless of industry
- Landscape
- Security company
- Manufacturing, electrician
- Veterinarian, restaurant owner
- Architect

# SMALL BUSINESS PRO PLAN

## Engagement questions used to create interest and assess need

- What keeps you up at night regarding your business?
- Debt collection issues; contracts reviewed.
- Do you have debt collection concerns?
- Do you have an employee handbook?
- Are you concerned about being sued?
- Receivables? Questions about taxes? Employee issues?
- Our goal is to help 10,000 households become successful employers over the next 10 years. Then I listen.
- What are your concerns as a small business owner? Do you have a large legal defense fund at your disposal?
- Tell me about your business: issues, problems, etc.
- What do you currently pay per hour to talk to your attorney?
- Tell me how you started. What's your top goal this year?

## Objections and how to overcome them

- Don't need that much coverage.
- "I have standard contracts from my industry": I review and share how contracts differ from state to state
- Already have an attorney.
- "I haven't ever needed an attorney": Ask a few questions that brings to light situations they didn't previously consider legal in nature.
- "What kind of attorney is that cheap?" Shared economy. "I have a present relationship": \$\$ to retain? Do you feel free to call anytime? "I don't have legal issues": Updated employee handbook, remote workers, changed world since COVID.
- Too expensive, I don't use attorneys.

# SMALL BUSINESS PRO PLAN

## Top benefits or hot buttons

- Trial defense, unlimited access
- Debt collection; contract review
- Does business out of state/has several locations/has employees at each location
- The most comprehensive plan, especially if they are doing business in and out of state
- Employee handbook
- Contracts and debt collection
- Nationwide coverage/immediate answers to questions/multiple users in business
- Protection, ability to ask unlimited questions and get advice on anything, business expense write off (same on all)
- Consultation, document review, lawsuits (IP)
- Contract review
- Are you concerned with lawsuits affecting your business or everyday operation?
- Unlimited consultations for multiple users, contract review, letters and phone calls
- Unlimited consultation, number of users, contract drafting, patents and trademarks

## Most used tool(s) for presenting

- Business plans overview
- Flier/flat sheet
- PBLS video/Zoom
- I present Essentials/Plus/Pro and do a consultative selling
- Small business flat sheet, white paper, 101
- Melissa Peters recorded Zoom
- In person presentation
- Business plan over view of all plans

## The ideal customer

- Store front
- Contractor
- Retail
- Interior design
- Company doing business across state lines
- Trucking company
- Candle manufacturer, CBD oil manufacturer,
- 3 years plus typically; LLPs; holding companies; scaling beyond 5+ employees; acutely aware of lawsuit risks; real estate; staffing; medical clinics; restaurants; tax & accounting
- Engineering firm
- Furniture store
- Medical
- Real estate investor (multiple states)
- Production industry (multiple states)

# SUPPLEMENT HOME BUSINESS

## Engagement questions used to create interest and assess need

- What's your biggest stressor running your home business?
- Debt collection issues.
- Do you have rental income?
- Anything can happen, why take the risk?
- Describe the biz: owners, states of operation, etc.
- What do you have in place to protect your business?
- Do you understand the laws in setting up your business from home?
- Do you have the LS App?
- So you have a business on the side, or are thinking of starting a business?
- Have you ever had a situation for which you have provided a service and weren't paid?
- How to navigate the new way of business since COVID.
- Do you know someone with a side hustle?
- Do you have any side gigs or other streams of revenue, like rental properties?
- If your renters sue you, we give you 60 hours of protection.
- Our goal is to help 10,000 households become successful employers over the next 10 years. Then I listen.
- We have a new biz tool that gives you access to biz consultants, creates a great biz website, helps you to expand your customer base. It's a powerful tool for growth.
- Have you ever hired a lawyer for something related to your business?
- What are your concerns as a home-based business?
- Do you have rentals, home business, very small business? What are your issues?
- Do you earn on a 1099? Have you had your business documents reviewed by an attorney? Are you concerned about being audited?
- Tell me how you started. What's your top goal this year?

## Objections and how to overcome them

- Don't need a lawyer.
- "I don't need to ask business questions": I ask if they own rental property or do a side business.
- I don't really receive objections with regards to supplements.
- "I can't afford another bill": Can you afford a costly mistake? Can you afford to take a chance?
- "I don't need it": Covers Schedule C, tax deductible, have all business documents reviewed.
- "I do these things myself": If you knew you could delegate to a pro, would you?
- They're still hobbyist. Have yet to see their business a means to liberate them.
- "I already have those services": To give you total peace of mind that you have the best service right now, would you give me 15 minutes to show you what we're offering?
- "Can I think about it and could you send me something?" Ans = Sure but exactly what part of the plan were you needing clarification on so I can send you what your looking for to make an educated decision in protecting your home business today?
- The biggest thing here is people thinking they don't really need an attorney to help with rentals, etc.

# SUPPLEMENT HOME BUSINESS

## Top benefits or hot buttons

- Contracts, debt collection, IRS audit protection
- National coverage and cover up to 5 businesses
- Having the lawyers on speed dial 24/7
- Need 2
- Contract review; consultations
- Family business/uses contracts with clients/uses contracts with independent contractors
- This allows the member to talk about business matters, although they may be a one-man show
- Starting small while dreaming big
- Access to a law firm, affordable, tax write-off
- Plan benefits
- Letters
- Legal advice (business structure), document review, letters
- Consultation
- New audits to recoup lost tax revenue
- Write-off, protection, advice
- Contracts & Schedule C protection
- Consultation, taxes, structuring
- Unlimited access to attorneys to help you grow your home biz
- Advice & consultation, contract review, collection letters
- Are you concerned with lawsuits affecting your home business or everyday operation?
- Unlimited consultations, contract review, debt collection
- Unlimited consultation , IRS audit, debt collection letters

## Most used tool(s) for presenting

- Flat sheet/video
- HBS overview
- PBLs video/Zoom
- One-on-one
- Phone
- Split sheet

## The ideal customer

- Realtor
- Network marketer
- Photographer
- Inspector
- Home based business owner - providing services
- Solopreneur/consultant/independent contractor
- Sole proprietor company (i.e., consultant)
- Women owned small business
- Therapist, MLM
- Tax prepare, day care
- Start up, real estate investor
- Insurance
- Self employed student for license to carry
- Trade (HVAC, plumbing), entrepreneur
- Typically start up to 2 years; concerned about having the correct foundation; starting to take on clients on regular basis; needs to understand taxes; growing IP concerns
- Home healthcare
- Biz coach
- Individual with rentals (landlord)

# SUPPLEMENT TRIAL DEFENSE

## Engagement questions used to create interest and assess need

- What's your greatest concern about running your business?
- Talk about liability issues as a business owner.
- How likely are you to be sued?
- If you are sued, can you afford the expenses?
- Do you think you are vulnerable to being sued?
- Nuisance lawsuits?
- Would you agree that people sue for no apparent reason? Do you know how much that could cost? Do you have anything in place to protect you and your family from this?
- Tell me how you started. What's your top goal this year?

## Objections and how to overcome them

- Not seeing the need to protect themselves.
- "I don't need this at this time": Be proactive and preventative for your business.
- Not worried about being sued.
- "I don't need any extra defense": I tell stories of when members needed and used extra defense.
- "I've never been sued": I ask if they have ever been concerned about a difficult client.
- "If I have a need, I'll just hire someone": Who? How much?
- "I have never been sued and don't think I will be": Do you know anyone that has been sued? How much to you think a lawsuit would cost?
- (For business) "I'm not really concerned about being sued": I ask more questions about their customers, and what kind of issues they have had with them, and if they've ever been concerned those issues escalating.
- MLM, bad reviews with law firm, not using attorneys, etc.

# SUPPLEMENT TRIAL DEFENSE

## Top benefits or hot buttons

- Protect themselves from high lawsuit defense charges
- Value of the 100 hours being worth 30K+
- Consultations early so issue doesn't become bigger
- Likely to be sued/works with children and/or elderly/works with pets
- Protects them in the event of a lawsuit, especially small business
- Peace of mind
- Likelihood of being sued
- Risk-averse and concerned about being sued
- Head off nuisance lawsuits/peace of mind/advice to avoid
- Saving money, protection from the unknown
- For business: immense value and peace of mind
- Possibility of a lawsuit

## Most used tool(s) for presenting

- Trial defense supplement
- Flier/flat sheet
- PBLS videos
- Small biz fact sheet and overview video
- Determining the customer's needs and telling stories around that; following up with a brochure
- Prospect by LegalShield
- Membership sizzle videos
- Zoom or in person

## The ideal customer

- Real estate broker
- Security
- I talk to every potential Plus & Pro plan client about TBS
- Any company with a Plus or Pro plan
- Consultant, training specialist, business developer
- Daycare
- Contractor, roofer
- Trucking company
- Individual
- Medical, manufacturing, contracting
- Landlord

# SUPPLEMENT BUSINESS PLUS

## Engagement questions used to create interest and assess need

- May I share how I can show you a way to also ask unlimited non-legal questions?
- Do you want to save on website development?
- Do you need advice on expanding or further developing your business?
- Our goal is to help 10,000 households become successful employers over the next 10 years. Then I listen.
- Have you ever hired a consultant for something related to your business?
- What are your concerns as a small business owner? Do you have a large legal defense fund at your disposal?
- Tell me how you started. What's your top goal this year?

## Objections and how to overcome them

- "I already have a website": I share the other benefits of this supplement.
- Log in is always a challenge.
- Generally, a hard sell. Need more material about specific ways to use (such 101 Reasons).
- No need for marketing assistance. I have all those things already.
- "I already have those services": To give you total peace of mind that you have the best service right now, would you give me 15 minutes to show you what we're offering?
- MLM, bad reviews with law firm, not using attorneys, etc.

# SUPPLEMENT BUSINESS PLUS

## Top benefits or hot buttons

- Starting a new business/relaunching a business/adding a new location
- This puts an HR component around their business
- Affordable website
- Demographic information, industry specific marketing, federal regulation
- Documents, marketing (social media), client relationship building
- Access to consultants without leaving your home or office
- Business consultation, business forms, website builder
- Are you concerned with lawsuits affecting your business or everyday operation?
- Business consultation, CRM, website

## Most used tool(s) for presenting

- Flat sheet/flier
- PBLS videos
- Small business flat sheet
- Biz plus flyer
- Flat sheets zoom or in person
- Facts sheet
- Zoom or in person

## The ideal customer

- Realtor
- Network Marketer
- Photographer
- Insurance agent
- Solopreneur/consultant
- Anyone who has a business or wants to start a business
- Consultant
- Training specialist
- Business developer
- New business
- Real estate agency that is expanding to other states
- I couple it automatically with business plans unless the person articulates an acute interest in only legal services, not occupied with growth, marketing, etc.
- Home healthcare
- Biz coach
- Consultant
- Any small business

# SUPPLEMENT GUN OWNERS

## Engagement questions used to create interest and assess need

- Are you worried about using your weapon in self defense? Are you concerned how to act if pulled over with your weapon concealed?
- Do you have your guns in a trust?
- Talk about need for lawyer if weapon discharges.
- Do you own a gun?
- Do you carry a gun with you and intent to use if necessary?
- Legal implications (criminal and civil) if you use your handgun for defense.
- If you own a firearm, what is your plan when you display or discharge?
- Do you have a concealed carry permit?
- If your gun goes off in a bad situation, who pays the legal bills?
- What are your concerns as a gun owner? Do you have a large legal defense fund at your disposal?
- Do you own firearms? What do you have in place to protect yourself if you need to defend yourself or someone else?

## Objections and how to overcome them

- Don't own a gun; don't have license to carry.
- "I am already covered with another plan": I share a few benefits that shows how our plan is more comprehensive by being attached to a legal plan.
- "I don't need legal services": I state that justice is green and anyone can sue if you use your firearm at home, work, or in and around your vehicle. They go after deep pockets. Political climate will determine criminal charges and the costs associated with it.
- "Won't ever fire it": Hope for the best, plan for the worst.
- I have US Law, it is less expensive, and it covers more things without the 25% discount
- Had a plan from their conceal carry class (great referrals)
- "Can I think about it, and could you send me something?" Ans = Sure but exactly what part of the plan were you needing clarification on so I can send you what you're looking for to make an educated decision in protecting your gun today?
- "I'm not concerned about potential legal issues": This is a call for more questions. Do you conceal carry? How often and where? What would you do if something happened? It's better to have it and not need it than need it and not have it.
- MLM, bad reviews with law firm, not using attorneys, etc.

# SUPPLEMENT GUN OWNERS

## Top benefits or hot buttons

- Self defense trial time, all questions answered about gun laws in every state
- 2nd amendment right and CRIMINAL TRIAL defense fund
- Access to lawyer immediately, consultation, trial defense
- Owns a gun/protects a store with a gun/travels with a gun
- This protects the second amendment rights of the owner
- Immediate access, trial defense
- Want to make sure they are within the law and will be covered if they have to fire their weapon
- How poorly trained they are after the shooting proficiency
- Consultation on varying state's laws/civil and criminal representation, and advice
- Protection, peace of mind, saving money
- Fear of home invasion, family defense
- Are you concerned with lawsuits affecting your life if one day you need to use your gun for protection?
- Consultations, trial defense both criminal and civil, emergency access
- Gun trust, assault charge

## Most used tool(s) for presenting

- Flat sheet/video
- GOS plan overview and comparison chart
- PBLs
- License to carry class right after the shooting proficiency
- Phone
- Prospect by LegalShield
- Membership Sizzle Videos
- Zoom or in person

## The ideal customer

- Gun Store - CCW class
- EVERYONE IN MT
- Advertising agency
- Security/police officer
- Individual who routinely carries a gun
- Ask each person about this
- #1 License to carry handgun student
- Truck driver, family plan owner
- Individual with concealed carry
- Everyone
- Any employee
- Any group
- Add on to many of my group offerings
- Auto repair, lawn care
- Police officer and small business owner

# SUPPLEMENT RIDE SHARE

## **Engagement questions used to create interest and assess need**

- Have you been mistreated while driving for Uber or Lyft?
- Do you have family members who work in the delivery or car service industry?

## **Objections and how to overcome them**

- "I only do ride share part time": I share member stories of how this supplement helps whenever they are on the job

# SUPPLEMENT RIDE SHARE

## Top benefits or hot buttons

- Uber driver/Lyft driver/delivery person
- Individuals who use their vehicle as a source of income, especially gig workers; this allows them to receive help from the law firm

## Most used tool(s) for presenting

- Flat sheet/flier
- PBLs
- Zoom or in person

## The ideal customer

- Uber driver
- Door Dash driver
- Rideshare worker
- Lyft driver

**SHIELD  
NATION**

**A MOVEMENT  
TO EMPOWER & PROTECT  
PEOPLE**