

Choose a lead format.

A practical guide for licensed insurance agents and agencies.

DIGITAL LEADS

A consumer inquiry record delivered according to the selected program. The agent initiates follow-up. A CRM update timestamp is different from the original inquiry date.

Review: Source method, inquiry age, included information, delivery destination, sharing status and territory.

LIVE TRANSFERS

A phone connection under a campaign's criteria. The agent needs to be available to receive and conduct the conversation.

Review: Call source, qualification criteria, receiving number, hours, billable events, missed calls and credit eligibility.

MATCH THE FORMAT TO YOUR WORKFLOW

Choose digital leads when your process is built around reviewing records and initiating follow-up. Consider live transfers when you can receive calls during the agreed campaign window. Confirm the actual program requirements before deciding.

YOUR AEG STARTING POINT

Create your agent account through the AEG registration link on aeg-lead-solutions.com/preview-2026. Registration is required before checking territory availability. It does not itself place an order or guarantee inventory.

This educational kit does not establish a price, minimum order, availability, delivery commitment or sales outcome. Leads are not guaranteed appointments, policies or sales. Written program and order terms control.

Review the order details.

Use this checklist with the specific program and its written terms.

- ☐ **Product and source**
What type of lead or call am I buying? How was it generated?
- ☐ **Age and timestamps**
When was the consumer inquiry created? What does each timestamp mean?
- ☐ **Distribution**
Is it exclusive or shared? What are the distribution or resale limits?
- ☐ **Territory and filters**
Does the program support my licensed state, county or ZIP and requested criteria?
- ☐ **Total cost**
What are the unit price, minimum order, fees, deposit and total initial commitment?
- ☐ **Billing and cancellation**
Is auto-refill or recurring billing enabled? How do I pause or cancel?
- ☐ **Delivery and activation**
Where will leads arrive? What activates delivery and what timing is agreed?
- ☐ **Credit or replacement policy**
What qualifies, what is excluded, what evidence is needed and what is the deadline?
- ☐ **Support and records**
Who handles the order? Where are my confirmation, terms and request references?

Keep a copy of the written terms before payment. If a material detail is unclear, request clarification before ordering. Use lead information responsibly and honor consumer communication preferences.

Measure what happens.

Record aggregate activity. Keep consumer details in your appropriate secure system.

Campaign / reference: _____ Program: _____
Period: _____ Total lead spend: \$ _____

Date / period	Leads / calls	Contacts	Appointments	Applications	Spend (\$)

USE CONSISTENT DEFINITIONS

- Contact:** A completed two-way conversation, counted once per prospect.
- Application:** An application submitted; this is not confirmation of an issued or paid policy.
- Cost per contact:** Lead spend divided by unique contacts. Leave blank when contacts are zero.
- Cost per application:** Lead spend divided by submitted applications. Leave blank when applications are zero.

Compare similar periods and lead formats. Activity counts do not establish profit or predict future results. For order questions, contact Andreas@aegempire.com with the order reference; do not email consumer records.