

Common Lead Q&A

Security National

Family of Life Companies



▼ What types of leads do you have?

Security National offers several types of leads for purchase: direct mail, search engine, Facebook, and live transfer. We use multiple vendors for these leads.

You can purchase leads two ways:

Instant Leads – Existing leads available immediately in the Lead Store. Choose from new or follow up leads.

Lead Campaigns – Start a new campaign to target your desired demographics.

▼ How much are leads?

Lead prices vary based on the vendor, minimum, and disposition. We recommend checking the Lead Store for the most accurate information for prices, time frames, and order minimums for each vendor.

▼ Where do I find my leads?

Purchased leads can be found in the 'My Leads' section of LeadHub in Agent Portal. Instant Leads will appear after you complete your purchase. Campaign Leads will appear as the new leads are generated by your campaign.

▼ How do I download a lead?

All leads have a PDF version you can download to use as part of your presentation. To download, find the lead in LeadHub and click the 'View PDF' button. This will open a new browser tab that allows you to print or download the lead.

For mailer leads, you can download the response card returned by the client. To download, follow the same process. Click 'View Attachment', open in a new browser tab, and print/download the lead card.

We are unable to send leads via CSV, Excel spreadsheet, or any other file type for uploading to a CRM or dialer.

▼ My lead doesn't have a phone number?

All lead types have a field for a phone number, but on rare occasions this information is not provided by the lead. If you are working a mailer lead, we recommend checking the attachment to see if the phone number is on the card as sometimes this information is not pulled into LeadHub.

▼ My leads are not what I was expecting, can I get a refund?

We are unable to give refunds for: no/bad phone number, no answer, or if the lead is not interested. If you receive a lead with no point of contact or the lead is outside of your requested area, please contact our lead team to see if you are eligible for a refund. *Please Note: Some vendors state they will go outside your designated radius if there is not a sufficient response in your zip code. Refunds are not available in these situations*

▼ How do I work the leads?

Please reach out to your manager or watch our [New Agent Training Videos](#) for details on how best to work your leads. Our leads department can assist with placing an order, downloading leads, and checking your order status, but we are unable to assist with working individual leads.