Scheduling & Lead Generation

Changing the Approach to Scheduling & Lead Generation for Wholesalers, CPMs, CIOs and CEOs.

FLX Networks is changing the industry standards for scheduling services by utilizing a simple yet unique approach. We are combining our **advanced advisor data** that is extensive and routinely updated, with a thoughtfully **selected partner** who provides a team of scheduling associates. The associates are all in-office on full time basis, not scattered around the country on part time basis.

Our approach translates to a **well-trained team that harnesses best in class data to drives results.**



Scheduling & Lead Gen Solution Guided By Executive Team With Extensive Financial Sales And Distribution Experience

- Executive Team has decades internal and external sales management experience at top asset managers
- Significant experience hiring, training, retaining, motivating and developing talent in this space, so you can focus on your core responsibilities.

Dedicated In-House Associates

- Our office operates Monday-Friday, 9am to 5pm Eastern.
- Our model helps you boost your meetings per month, increase sales and connect with new reps through our established sales network

All Client Associates Are Held To A Minimum Standard Of Excellence

- Achieved through comprehensive training, supervision and encouragement by management

A Fast-Paced, Energetic Culture Is Unmatched In The Scheduling Industry

- Team building incentives and events
- Top Performer Recognition
- On-going training and education

Contact us at SOLUTIONS@FLXNETWORKS.COM to learn more.

www.FLXnetworks.com

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Scheduling - How it Works

Our Goals are Simple

Each associate is held to a proven formula for success through focused activity. For a 2-hour time block, associates are expected to average between 20-25 outbound dials per day which will translate to 6-8 contacts with advisors or their assistants, ultimately resulting in 3-5 meetings scheduled per week.

Weekly team meetings, individual feedback and quantitative data measuring each associates effectiveness are the best practices to ensure the scheduler experience is superior to the industry standard.



Wholesaler Scheduling Coverage Models

Choose what suits your business goals best

3:1 COVERAGE RATIO

- 1/3 of a scheduling associates day
- Nightly Wrap-up email
- In-house supervised and trained staff
- Monday – Friday dedicated 9am-5pm

2:1 COVERAGE RATIO

- 1/2 of a scheduling associates day
- Nightly Wrap-up email including dial tracking
- In-house supervised and trained staff
- Monday – Friday dedicated 9am-5pm

1:1 COVERAGE RATIO

- 8 hours of calling exclusive to your account by dedicated associate
- Comprehensive dashboard tracking metrics: contact rate, dial rate, meeting rate, conversation rate
- Nightly Wrap-up email including dial tracking
- In-house supervised and trained staff
- Monday – Friday dedicated 9am-5pm

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