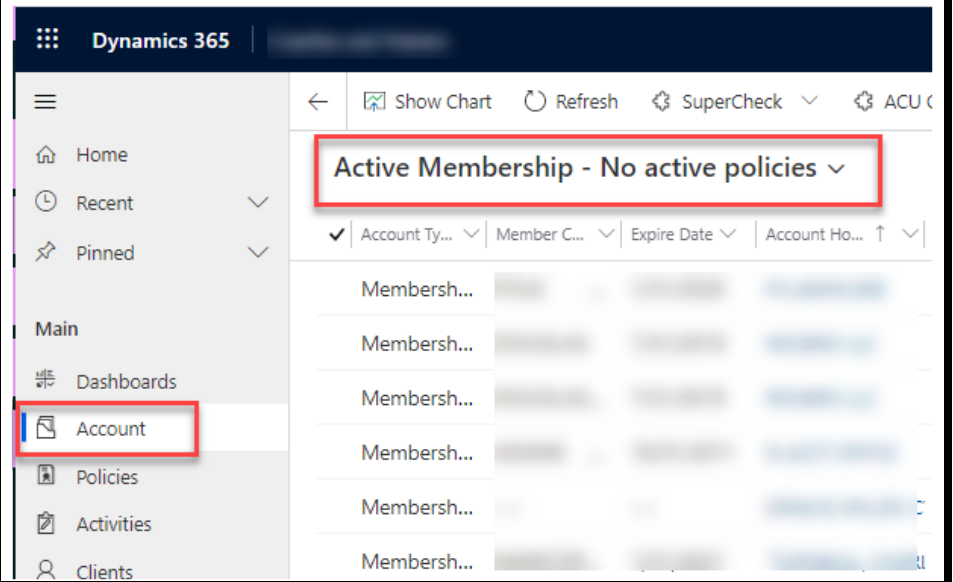


Step 1

In CRM go to the **Account** tab.

Make sure the header / view is showing “Active Membership – No Active Policies”

If you don't see this view please reach out to your coach or trainer



Targeting membership only accounts and highlighting the benefits is a great way to pivot towards Kansas Farm Bureau Health Plans, Wealth Management, Insurance and more!

They're already paying the county membership fee so it takes that concern off the table.