



AGENT ONBOARDING RESOURCE

# Direct Mail Ordering

A complete guide for Builders to get agents started on direct mail leads.

✉ Support: [leadteam@efesonline.com](mailto:leadteam@efesonline.com)

## Ordering Workflow

### 1 Sustainability Assessment

Submit the form to check vendor availability and Cost Per Lead (CPL). Results are typically emailed within one week.

[Complete Sustainability Form](#) ↗

*Note: If CPL is high or leads are lacking, contact the Lead Team to explore other vendor options.*

### 2 Start-Up Kit (SUK)

Once a vendor is decided, the agent must complete the SUK, which includes credit card info and the lead agreement.

[Fill Out Start-Up Kit](#) ↗

### 3 Official Mail Request

Email [leadteam@efesonline.com](mailto:leadteam@efesonline.com) with the agent's full name to trigger the order. Include any deviations from the Sustainability or SUK forms in this email.

**Important:** The SUK and Sustainability forms are steps, NOT the official request. Mail is only started once you email the Lead Team explicitly after all forms and contracts are signed.

## Timelines

- Mailings occur every Monday or every other Monday, depending on vendor.
- Orders are placed on the next available mail sheet.
- Leads typically start arriving in 4–6 weeks.

## Critical Policies

- Agents **must** purchase ALL leads returned from previous drops, even after cancellation.
- Weekly mailing requires weekly purchasing. Skipping leads results in skipped mail; repeated habits lead to cancellation.

Always follow up phone discussions with an email to [leadteam@efesonline.com](mailto:leadteam@efesonline.com) to ensure full documentation.