



# MAXIMIZING LEADS



# TOPICS

- **Lead Attitude**
- **3 Focus Areas**
  - **Lead vs. Prospect**
- **Working Leads**
  - **Prospect Strategy**
    - **Phone**
    - **Email**
- **Making Your Own Leads**
- **Getting Known in Your Market**
- **Summary**

**What is your attitude  
towards leads?**



# Lead Attitude

*These leads  
are horrible!*



# Lead Attitude

**It is the economy.  
No one is buying!**



# Lead Attitude

***"THEY BLEW  
ME OFF!"***

***"I NEED MORE  
LEADS!"***



# Lead Attitude

**IT'S NOT  
MY FAULT!**



# Lead Attitude

I will call them later,  
after I log them into  
my CRM!



# Lead Attitude

## Answer the following questions:

What is your process when you get a new lead?

How many times do you contact them?

After you meet with a prospect and they remain a prospect, do they know what to expect?

Can you define your leads and prospect strategy as a system?



Lead Attitude

It's not about  
more leads,  
**it's about  
maximizing  
the leads you  
have!**



# Focus Areas

# 1

**Making the most of your current leads**



# 2

**Making your own leads**



# 3

**Making yourself known**



# Focus Areas

If you are not properly working your current leads, why would you want more?

**"But it's a numbers game!"**



# Focus Areas

Yes, the more leads you have the higher the probability you will have a a sale.

**However**, the greater success you have in converting leads into appointments and appointments into sales, the greater your profitability.



# Focus Areas

## The difference between a LEAD and a PROSPECT

**LEAD:** A person who has responded to your advertisement or someone else's which you have purchased. This person has had no personal contact with you.



**PROSPECT:** Someone who knows of you, either through an appointment or conversation with you.

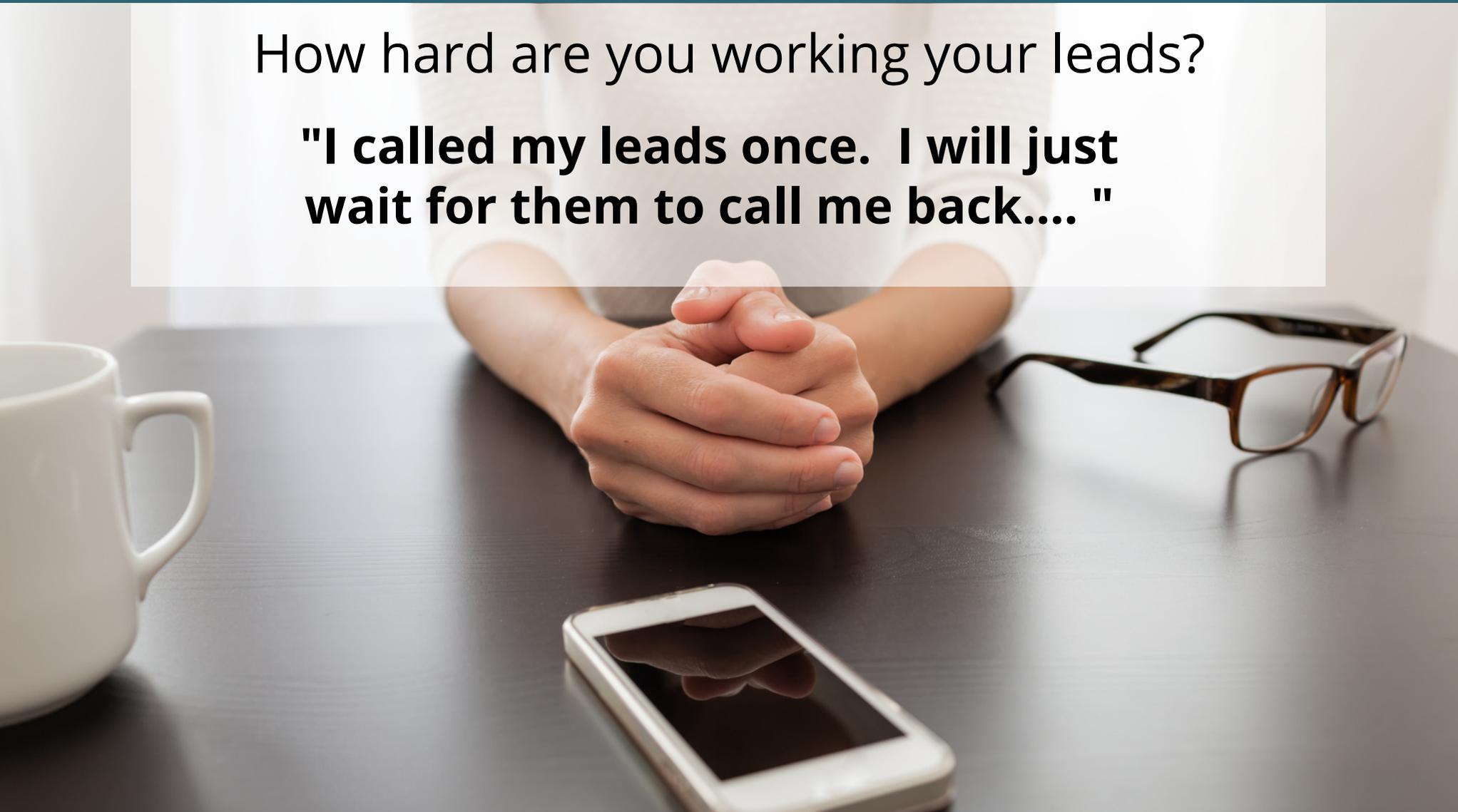


# Prospect Strategy

## Working Leads

How hard are you working your leads?

**"I called my leads once. I will just wait for them to call me back.... "**



# Prospect Strategy

## Working Leads

On average, it takes **8 calls** to reach a lead.



**44%** of salespeople give up  
after **one** call.

# Prospect Strategy

## Working Leads



The numbers in numerous studies show leads are given up on after one or two calls.

The same studies show it takes 8 (or more) contacts to reach a lead. This is for sales over multiple industries, but you have an advantage. The need for Medicare insurance is put forth by the industry and even through the Medicare & You publication.

# Prospect Strategy

## Working Leads

Prospects know they need coverage, but if you are not willing to work for their business, why should they choose to work with you?



# Prospect Strategy

## Working Leads



Creating a process is VITAL in the sales process. Crafting a system or process gives you the ability to make changes and progress.

If you have no consistency, how do you know what to change when you want to improve your numbers?

# Sample Prospect Strategy

## WEEK ONE

**Monday**

**Initial Contact**  
Responding to lead

**Tuesday**

**Second Contact**  
Vary the time - if you called in the AM try in the PM

**Wednesday**

**Thursday**

**Third Contact**  
Change the message. I.E. "No obligation"

**Friday**

**Saturday**

**Sunday**

**Note**

## WEEK TWO

**Monday**

**Fourth Contact**  
Capture interest. "I helped a person in \_\_\_ offset their drug costs by \$\$"

**Wednesday**

**Fifth Contact**  
"Know you are busy but want to make sure you are taken care of."

**Friday**

**Sixth Contact**  
Perhaps don't leave a message. They should know your number.

**Sunday**

**Tuesday**

**Thursday**

**Saturday**

**Note**

## WEEK THREE

**Monday**

**Tuesday**

**Seventh Contact**  
Last contact - close your file.

**Wednesday**

**Thursday**

**Friday**

**Saturday**

**Sunday**

**Note**

Send an email if you have their email address

# Prospect Strategy

Working Leads

## What will your strategy look like?

A close-up photograph of a hand holding a white puzzle piece. The word "STRATEGY" is printed in bold, black, uppercase letters on the puzzle piece. The puzzle piece has a notch on its top edge and a protrusion on its right edge. The background is a soft, out-of-focus brown and orange gradient.

That depends on you. There is no “one-size-fits-all” method, but it is vital to have one.

Your strategy may be different, depending on the lead type, your style, etc. but that does not mean you do not have a system in place to help you produce the best results.

Think of a doctor’s office. Each patient is different, but that does not mean every person gets their own routine. The same is true with your leads process and strategy.

# Prospect Strategy

Working Leads - PHONE

## ***VOICEMAIL CHAIN***

It will happen. You will have a great appointment. Things will go well, and then they will throw out an objection like “I need to think about it” and dig their heels in the ground. After some discussion, you determine you will call them back. This may start the voicemail chain.



A man with a beard and glasses, wearing a light blue shirt and a dark tie, is shown in a state of intense frustration. He is holding a dark smartphone in his right hand and shouting with his mouth wide open, looking at the screen. The background is a solid teal color.

# ***"I CANNOT GET MY VOICEMAILS RETURNED!"***

This may be because you are leaving something along the lines of: "I am calling to see if you have any questions."

**Never say this again.**

There is a high probability your prospects do not have questions; they have hesitations and that message did nothing to help alleviate them.

# Prospect Strategy

Working Leads - PHONE

## ***VOICEMAIL CHAIN***

For better voicemails, use this bulleted script:

- Your Name
- Reason For Contacting
- Motivation to Talk To You
- How to Contact You (If leaving message with a lead)
- Next Steps

Each voicemail should have its own unique method and message behind it.



# Voicemail Examples

The following examples are for leaving messages for a prospect after an appointment. Your method, frequency, and style may differ. You are welcome to modify or rearrange, and make these your own.

**First Voicemail:** Designed to establish you will do what you say you will do.

"Hello prospect. This is \_\_\_\_\_. I am calling to follow up as we discussed. If I do not hear back from you by \_\_\_\_\_ I will try you then. Thank you."

**Second Voicemail:** Establish you still do what you say you will do.

"Hello prospect. This is \_\_\_\_\_. I know you are busy, and this is a decision worth thinking about. If I don't hear back from you by \_\_\_\_\_, I will try you then. Thank you."



# Voicemail Examples

The following examples are for leaving messages for a prospect after an appointment. Your method, frequency, and style may differ. You are welcome to modify or rearrange, and make these your own.

**Third Voicemail:** No obligation - not trying to be a pest.

“Hello prospect. I wanted to let you know there is no obligation to change or stay with your current plan. If I don’t hear back from you by \_\_\_\_ I will try you then. Thank you.”

**Fourth Voicemail:** Benefit

“Hello prospect. I just wanted to let you know I helped someone else in your area save over \$X on their prescription drugs. Your savings could be along the same lines. I will try you back by \_\_\_\_\_. Thank you.”



# Voicemail Tips

## **Make them sound natural and fluid**

The previous examples were just that, examples. The more comfortable you are and well spoken your voicemails are, the higher probability they will have of getting returned.

## **Have your scripts ready**

Before you pick up the phone to follow-up, you should know exactly what message you will leave if they do not answer. If you are worried about reading the script and sounding like a robot, make talking points.

## **Offer alternate means of contact**

Leave your website on the voicemail should they want to email you back instead. Or offer them to text you.

## **Contact Info**

Leave your contact info if you are calling a land line. If you are calling a cell phone, they should have it on caller ID.

# Do I need to leave a voicemail?

With robocalls and other solicitors bombarding people with information, if you do not leave a message your prospect or even client may brush off that missed call as a spam. Leaving a voicemail legitimizes your time and reason for calling.



# Applying your voicemail style for other lead and prospect interactions.

You need to know what you are going to say with confidence prior to the lead or prospect picking up the phone or answering the door (or whatever outbound method you are using).

Make sure you have your scripts and/or talking points ready to go and sounding fluid!

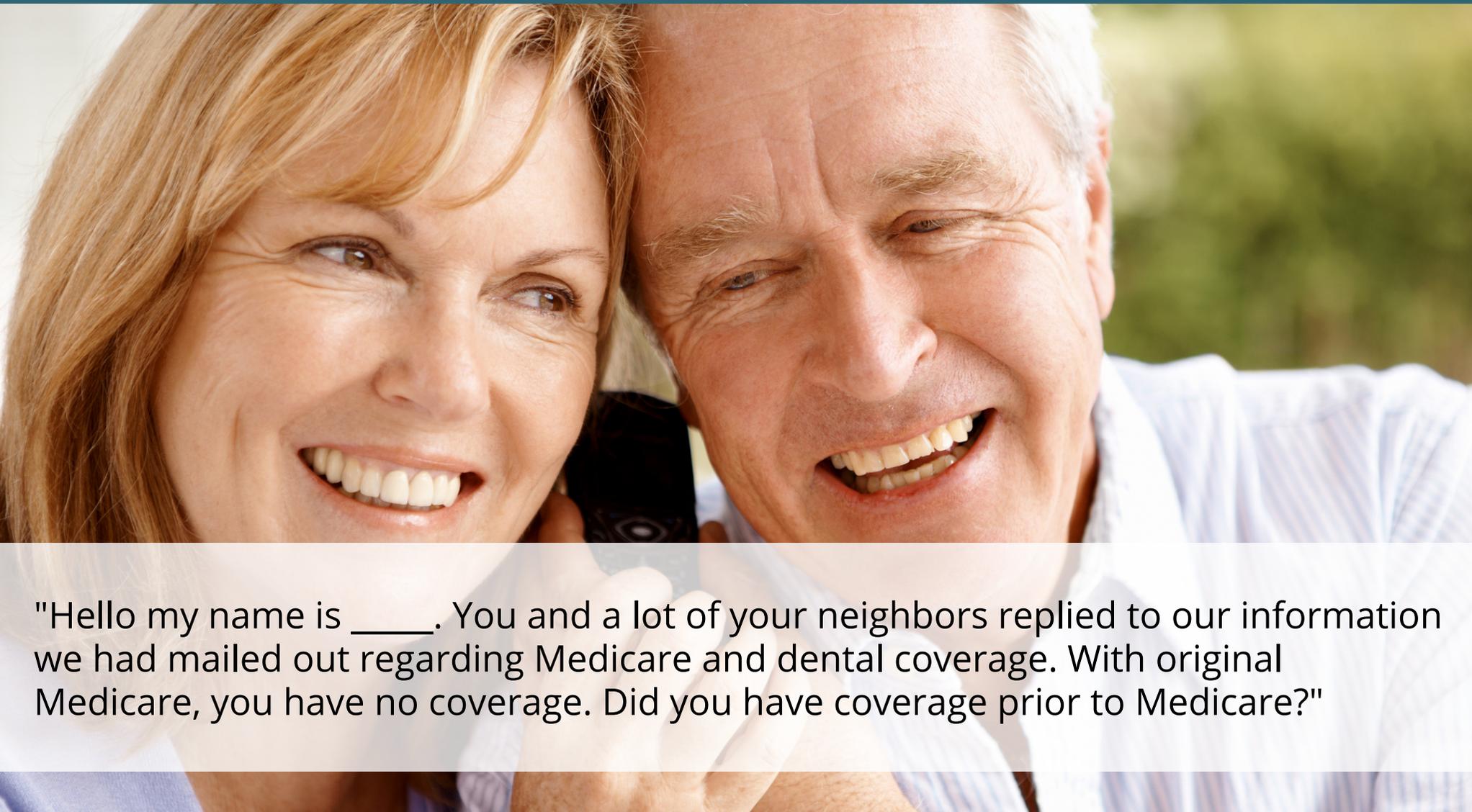


# Example: Door to Door (in person)



"Hello, My name is \_\_\_\_\_. I am here today because I am working with Medicare beneficiaries in \_\_\_[city/neighborhood]\_\_\_ who are looking to save money on their prescription drugs. Are you interested finding out how your neighbors saved on their drugs?"

# Example: Phone Call (live answer)



"Hello my name is \_\_\_\_\_. You and a lot of your neighbors replied to our information we had mailed out regarding Medicare and dental coverage. With original Medicare, you have no coverage. Did you have coverage prior to Medicare?"

# Example: Current Clients (live answer)

A woman with long brown hair, wearing a green button-down shirt, is sitting at a wooden desk. She is smiling and talking on a white smartphone held to her right ear. Her left hand is raised, holding a pen. In front of her is a silver laptop and an open notebook. The background shows a bright, modern office space with large green plants and framed blue artwork on the wall.

“Hello client. It’s \_\_\_ your agent. A lot of my clients have been asking me about dental care and I have a new plan that will help offset some of those high dental bills. If you want more info, I can email some out.”

# Example: Current Clients (voicemail)

“Hello client. This is \_\_\_ your agent. I had a conversation with another client that reminded me of the last time we met. Give me a call when you get a moment. Thank you!”



# Prospect Strategy

## Working Leads - PHONE

You need to know what you are going to say with confidence prior to the lead or prospect picking up the phone or answering the door (or whatever outbound method you are using).

Make sure you have your scripts and/or talking points ready to go and sounding fluid



# Prospect Strategy

## Working Leads - EMAIL

### **Looking to revive leads and prospects?**

Try this simple email:

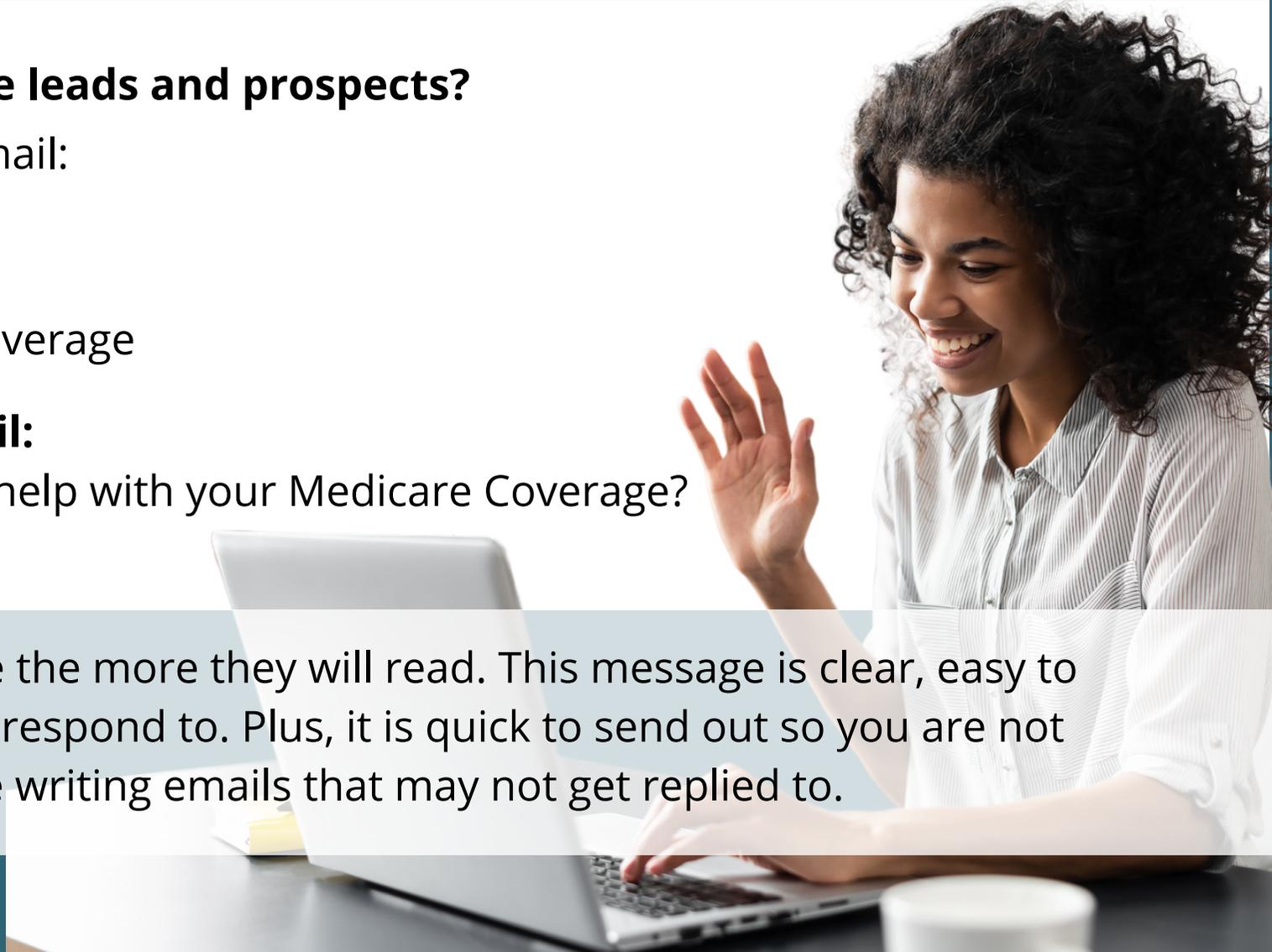
### **Subject:**

Your Medicare Coverage

### **Body of the email:**

Do you still need help with your Medicare Coverage?

The less you write the more they will read. This message is clear, easy to read, and easy to respond to. Plus, it is quick to send out so you are not wasting your time writing emails that may not get replied to.



# Prospect Strategy

## Working Leads - EMAIL



When talking to current clients, offer to email information to them to review. This is a great way to acquire their email address and get them onto your e-newsletter.

### **Example:**

“Client, I will go ahead and email you some info on this and if you’d like I can add you to my quarterly newsletter that focuses on prescription drug savings.”



# Making Your Own Leads

**It's not suppose  
to be easy or  
quick.**

**Self lead generation is designed to  
reward the willing.**

Some of the best leads you will work are your own. You can control the narrative in the creation and expectations of the leads.

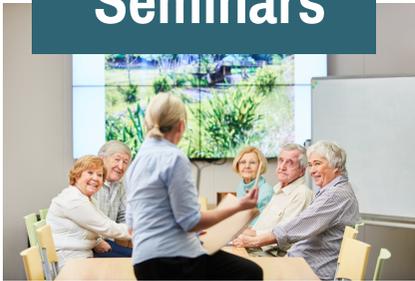


# Making Your Own Leads

There are numerous ways to self generate leads. Not all methods will work in all markets or for every agent. They will take investments in the form of time and/or finances from you to succeed.

Some of the common methods for self-generated leads are:

## Seminars



## Facebook Ads



## Current Clients



## Door-to-Door



## Cold Calling



# Making Your Own Leads

**SEMINARS** can be a great, low cost way to generate leads. You can also become a local expert at the same time.



# Making Your Own Leads

**FACEBOOK LEADS** Over the past few years, Facebook marketing for senior market agents have slowly been increasing in popularity. This method may take some more research to get acquainted with the Facebook business platform, but you can have very far reach for minimal investment.



# Making Your Own Leads

**COLD CALLING** Tried and true method for many agents, cold calling has become more popular since the ability for agents to use multi-line systems without buying any costly equipment. All you need is a headset, computer, and dialer software.



# Making Your Own Leads

**DOOR-TO-DOOR** Another tired and true method, many agents will perform this in-between appointments when they are in the field.



# Making Your Own Leads

**CURRENT CLIENTS** Your current clients are another great source for new leads. While they may have some basic products from you, adding additional coverage is easier than calling on cold leads that do not know you.



# Getting Known in Your Market

Modern technology has made it easier than ever to further your reach when it comes to getting your name out there. However, being known in your local market can generate some organic growth and produce leads and referrals.

Some of the common methods for self-generated leads are:

## **Civic Organizations**

These organizations, such as the Chamber of Commerce, local non-profits, and other groups are great to network with others who are looking to get their name in front of other local influencers.

## **Non-Profits**

There may be local non-profit organizations that can help your clients. Do you know who they are? Can you be a resource for this non-profit? Go out and talk to them!

## **Professional Partners**

Your client and prospects are using other professionals. Financial planners, estate planning attorneys, CPA's, etc. Why not partner and form a referral relationship with them?

## **Facebook Boost**

A Facebook boosted post differs from an ad from a boosted post is designed to drive likes and engagements and not create sales. Boosted posts, depending on your area and budget (which can be as low as \$10) can reach thousands in your area!

# Summary

## WHAT TO DO FROM HERE

### Get Your Process Down

Write out what you say when you are:

- Cold calling
- Going door to door
- Leaving voicemails
- Contacting a new lead
- Contacting a current client



What is your post appointment process? Are you contacting the prospect only once? Are you leaving them a reason to contact you?

**TIP:** Writing it out can help you fine tune your message and easier to practice.

# Summary

## WHAT TO DO FROM HERE

### **Review Your Leads**

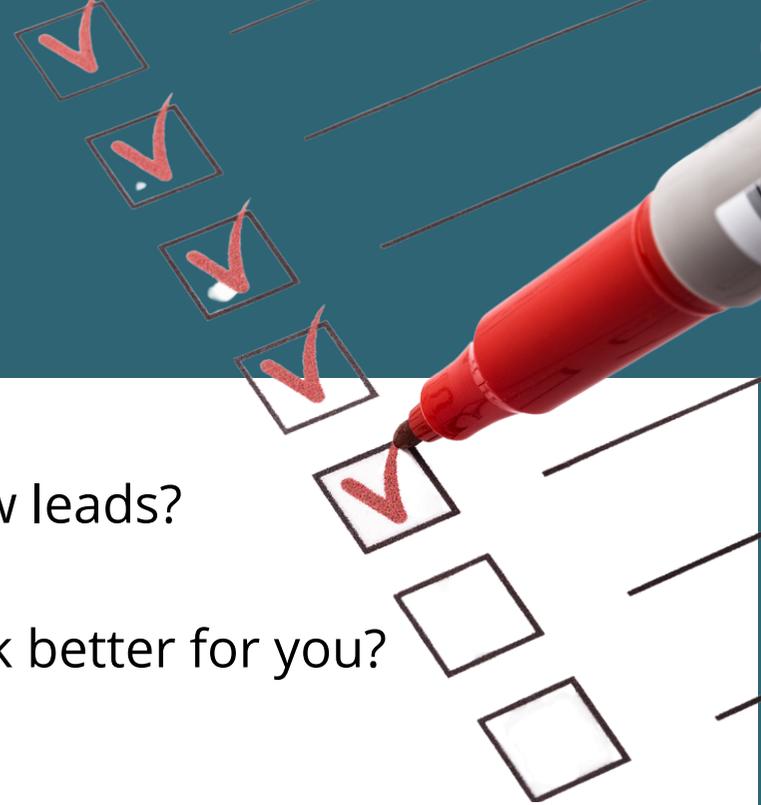
- What methods are you using to generate new leads?
- How profitable is it?
- What other methods are there that may work better for you?

### **Generating Your Own Leads**

- What are you doing to generate new leads?
- What interests you?

### **Getting Known**

- Who are the influencers in your local market and how are they doing it?
- What groups can you belong to?
- What non-profits are in your area you can work with?
- Look into Facebook boosting
- Host a seminar





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