Cornerstone Senior Marketing

AN INTEGRITY COMPANY

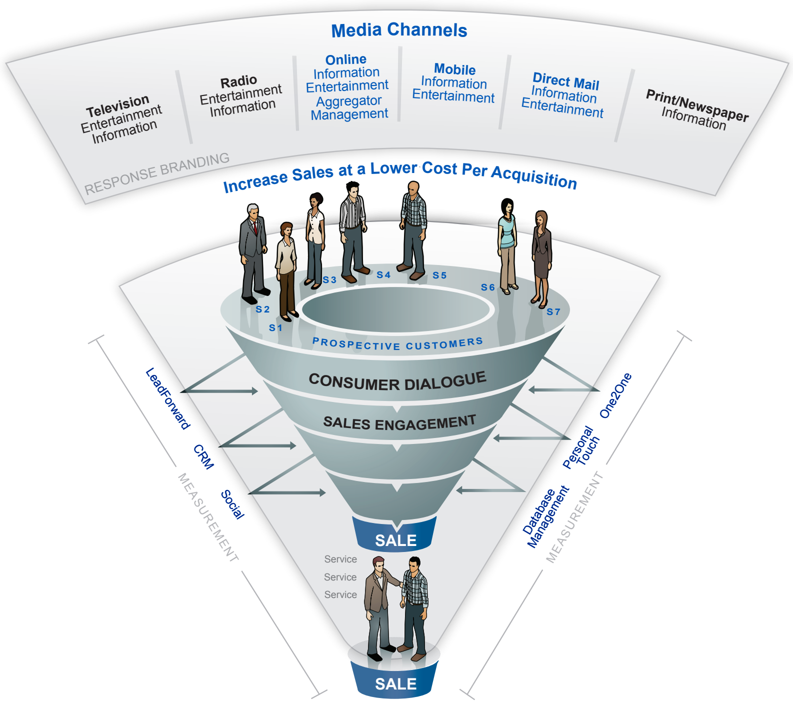
BEST PRACTICE

LEAD GEN

The insurance business relies heavily on high-touch sales, which makes lead generation an important part of your sales and marketing strategy. Below are some recommendations for managing your entire workflow to effectively generate and manage leads.

Respond to Leads Quickly

Many companies rely on external lead generation partners to generate leads on their behalf. These partners may own industry or category websites or drive traffic via television, direct mail or other means to their own properties. They then convert those visitors to a lead that is sold to other companies.



When using lead generation partners, it's critical that leads be followed up on in a timely manner. Leads should ideally be contacted within 1 – 2 minutes in order to increase the probability that the lead will convert.

Optimize and Test

Dynamics change constantly when running pay-per-performance or lead generation marketing. Testing on a smaller scale before launching a broad lead generation campaign can help you identify hidden challenges and opportunities to optimize around. It's also important to not "set and forget" your campaigns. Continuing to test throughout can help you optimize ongoing performance.

Use Key Perfomance Indicators
Lead generation is all about driving sales. Setting up and identifying your Key Performance Indicators (KPIs) at the onset of your campaign can help you avoid spending needlessly, as well as frame what is and isn't working. Make sure all your campaign tracking is set up properly, and use analytics tools and lead management software that integrate with the rest of your marketing technology.

Get Consumer Feedback
Marketing isn't just about metrics such as cost per lead; it's about creating an emotional connection with consumers and understanding how you are solving their problems. In addition to optimizing campaigns to metrics such as enrollments, consider a survey or other feedback mechanism where you can follow up and share insights. This closed-loop feedback can help you better understand what is and isn't working and improve down-stream performance.

Practice Lead Nurturing
Your brand is only as strong as your customer's experience. As you develop lead generation campaigns, you can enhance those campaigns by developing relationships with clients through every step of their journey. This includes using marketing automation channels such as email and text that can increase your touch points with the consumer to educate them on products and services. Integrity agents can leverage the resources found on MarketingCENTER to engage with consumers and clients, compliantly.

Use a Lead Management System
You can filter leads that don't meet the criteria of your products and services by using a Lead Management System (LMS). An LMS can also be used to provide services such as lead scoring and lead routing. Lead scoring — one of the features in LeadCENTER — allows you to prioritize the leads based on the likelihood of that lead to convert.

Stay Focused on Compliance
It's important that you require explicit consent from consumers/prospective clients to be contacted, no matter your industry. This includes opt-in for communications such as calls, emails and texts from your specific business. Additionally, there is regulation for consumer protection (CCPA, TCPA, CMS) and information such as health data (HIPAA). Before collecting or storing data, obtain legal advice to ensure that you are compliant. Be sure to perform regular checks to make sure any marketing channels and lead partners are also in compliance with both CMS and TCPA regulations.

By following these basic guidelines, you can maximize your lead generation efforts — and ultimately develop long-term lead generation strategies and programs — to help grow your business more efficiently.

Use Lead Gen Tools
Before, during and after applying these best practices to your business, you need reliable tools that were built to handle the whole process of lead acquisition and management.

LeadCENTER offers a one-stop shop for high quality and compliant leads, making the process of acquiring and managing leads simple and convenient. LeadCENTER has multiple lead types for multiple products, real-time leads, on-demand leads, custom campaigns, geo-targeting capabilities, adjustable budget and payment features — and it is available on your mobile device.

Then, leverage MedicareCENTER for full client management, tasks, Client Sync, Quote & eApp, compliance features like Call Recording and data security, a Mobile App, and more. Your LeadCENTER leads flow in seamlessly, saving you time so you can serve clients better.