

WORKING DIGITAL LEADS!

VOICEMAIL

Hey (lead's first name), its (your first name) getting back to you about your request for the new information. I'm the local field underwriter in your area so call me back real quick to setup delivery. Thanks (lead's first name), again its (your first name) at (insert number).

EMAIL

Hey (lead's first name), its (your first name) getting back to you about your request for the new information. I'm the local field underwriter and I'll be in your area on (insert day) so should I drop this off in the morning or the afternoon?

TEXT

Hey (lead's first name), its (your first name) getting back to you about your request for the new information. I'm the local field underwriter and I'll be in your area on (insert day) so should I drop this off in the morning or the afternoon?

DOOR - KNOCK PITCH

Hey (lead's first name), How are you? [smile, be enthusiastic, and take a step back as you say this] My name is Cody, I'm getting back to you about your request for the new (final expense, medicare mortgage protection, life ins.) information. Now, I'm the local field underwriter and I was in your area so figured I'd drop it off and check you off the list. Can I come in for a quick second? [start towards the door, look down, and wipe off your feet] Another Question Option: Should we sit on the couch or at the table?

Tools you will need!



Route4me app:
To efficiently run
your leads in the
field!



Haystack app: To
send a virtual
business card to
clients when you
text them.



Copy of the Lead:
To send to the
client by text,
email, or hand to
them at the door.



Branding: Make
sure you are
Branded so that
the client knows
who you are!

Be Confident, Be Happy, Serve them, and let them know how important it is that you come see them or set a sold appointment to call them back. We never know how these people will respond but we have to try ALL AVENUES! Let's Go Protect:)