



SENIOR MARKETING  
**SPECIALISTS**  
UNIVERSITY

# BETTER LEADS BOOTCAMP POST GUIDE

*An overview of key points and ideas discussed on the Better Leads Bootcamp*

*Disclaimer: Third Party Marketing Organizations are required to include a disclaimer in forms of communication to prospects and clients. This resource does not include information regarding the disclaimers.*

Senior Marketing Specialists  
(800) 689-2800  
[SMSTeam.net](https://SMSTeam.net)  
[SMS-University.com](https://SMS-University.com)

These leads are horrible!  
It is the economy, no one is buying!  
They blew me off!  
I need more leads!  
It's not my fault!  
I will call them later, after I log them  
into my CRM!



## What is your attitude towards leads?

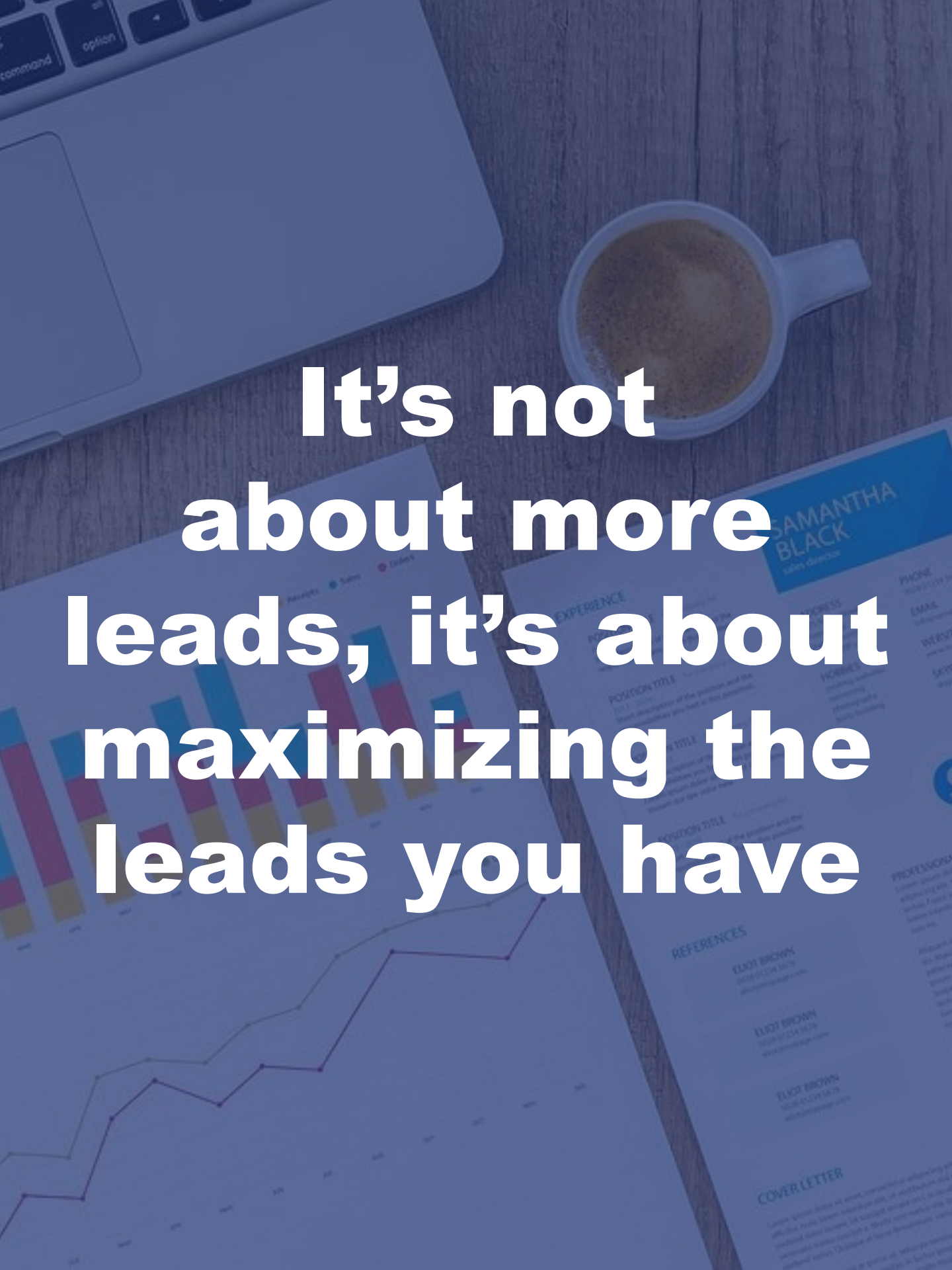
Honestly answer the following questions:

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?

A top-down view of a wooden desk with a laptop, a cup of coffee, and business documents. The laptop is on the left, showing 'command' and 'option' keys. The coffee cup is on the right. The documents include a bar chart, a line graph, and a resume for Samantha Black, sales director, with sections for experience, references, and a cover letter.

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

# FOCUS AREAS



- Making the most of your current leads
- Making your own leads
- Making yourself known

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

*"But it is a numbers game!"*

Yes, the more leads you have the higher the probability you will have a sale. However, the greater success you have in converting leads into appointments and appointments into sales, the greater your profitability.

For this guide, we are going to differentiate between leads and prospects.

## **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.





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

**On average, it takes 8 calls to reach a lead**  
**44% of salespeople give up after one call**

## How hard are you working your 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.

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

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?

# PLANNING

## Sample Prospect Strategy

DAY 1 ————— MULTIPLE CONTACTS —————> LAST CONTACT

**MONDAY / TUESDAY / THURSDAY / MONDAY / WEDNESDAY / FRIDAY / TUESDAY**

Initial contact -  
Responding to  
lead

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

Third Contact -  
Change the  
message - No  
obligation

Fourth Contact -  
Say something  
interesting  
I helped a person  
in \_\_city\_\_ offset  
their drug costs by  
\$XXX.

Fifth contact -  
Know you are  
busy but want  
to make sure  
you are taken  
care of.

Sixth Call  
Possibly don't  
leave a  
message. They  
should know  
your number.

Last Contact -  
Closing your file

{ Send an email (if you  
have their address) }

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.

### WHAT WILL YOUR STRATEGY LOOK LIKE?

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



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 (as seen in the sample prospect strategy).

**"I cannot get my voicemails returned!"** This is 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.**

For better voicemails, use this bulleted script:

- You 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 (as described on the sample prospect strategy page). Of course, your method, frequency, and style may differ. Feel free to use, modify, 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.”

**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.”

**Fifth Voicemail** – Alternate Contact  
“Hello prospect. This is \_\_\_\_\_. If it is easier to communicate by email, you can visit [your website] and drop me a note under the contact me page. I want to make sure you are taken care of. If I don’t hear back by \_\_\_\_\_ I will try you then.”

**Sixth Call** – Don’t leave a message  
Don’t leave a voicemail. They should know your number.

**Seventh Voicemail** – Closing File  
“Hello prospect. This is \_\_\_\_\_. I am going to close your file for now and your coverage will remain the same. I will follow back up with you in October unless I hear otherwise. You can always visit my site at [website] for information. 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.

You can use this voicemail style for other interactions with leads and prospects.

Examples:

**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?"*

**Current Clients**

*"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."*

**Leaving a 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!"*

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!

# 9 WORD 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.

## **TIP: OFFER TO EMAIL INFO OUT**

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 supposed 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.

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
- Cold Calling
- Current Clients



# Making Your Own Leads Ideas



## SEMINARS

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

## 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.

## COLD CALLING

Tired 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.

## 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 STARTED

Regardless which methods you choose from above, Senior Marketing Specialist has resources and tools to help get you started and successful. Contact us today!

# Getting Known In Your Market

An aerial photograph of a city skyline, likely Chicago, featuring numerous skyscrapers and a body of water in the distance. A large, semi-transparent blue geometric shape, resembling a stylized 'A' or a triangle, is overlaid on the left side of the image, partially obscuring the city view.

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!

# WHAT TO DO FROM HERE



My Plan:

## Get Your Process Down

Write out what you say when you are:

- Cold calling
- 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.

## 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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