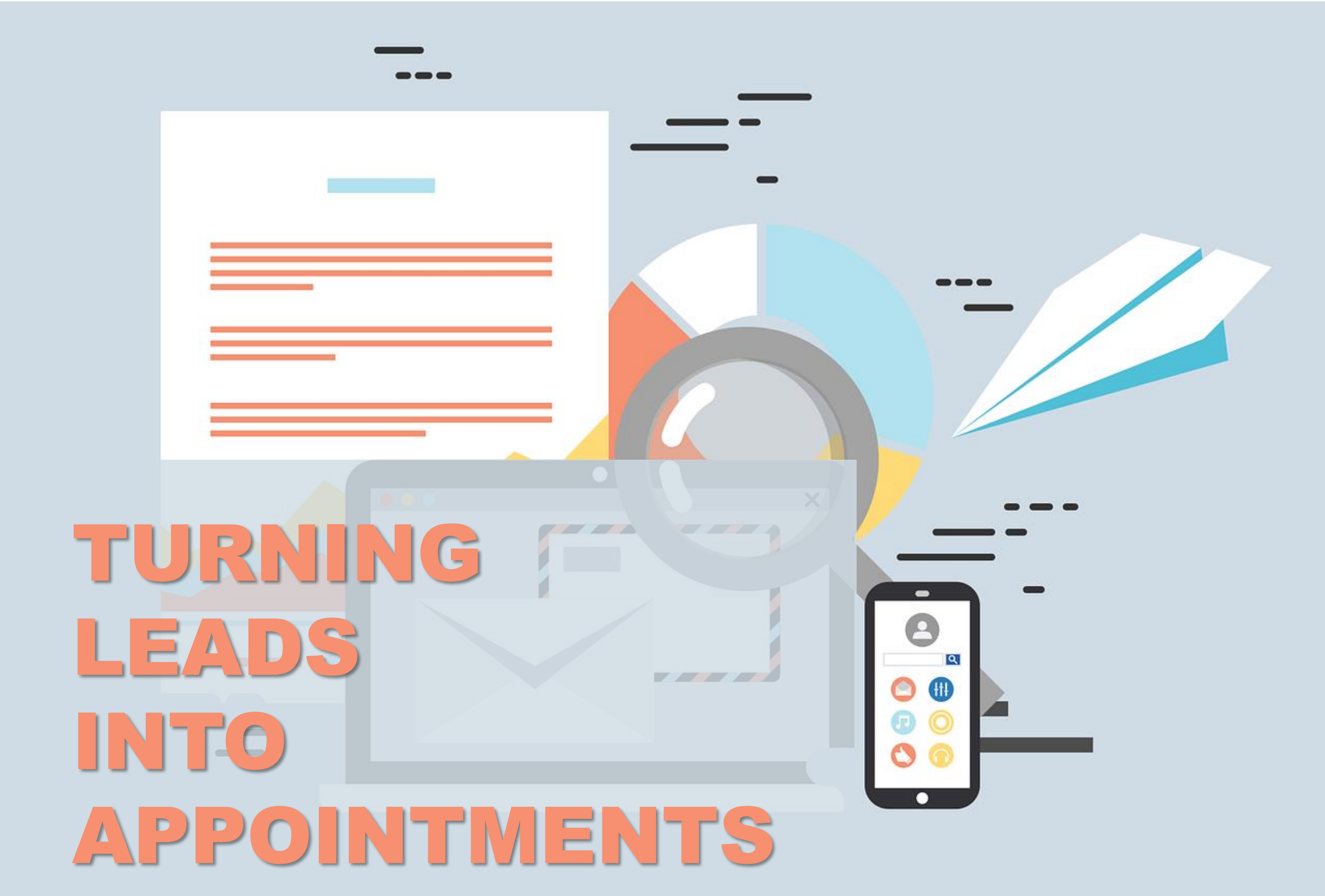

TURNING LEADS INTO APPOINTMENTS

Scripts, ideas, and more to help you create your process and increase your sales

Medicare Café

Where agents drink java and talk shop

SMS-University.com

(800) 689-2800

If I only had more leads, I could sell more…

Leads are only as good as the person who is working them. If you are not working your leads properly, just having more is not the answer.

Most agents do very well once they are 1:1 with the lead, having a conversation and discussing their needs and concerns.

The challenge is getting in-front of or on the phone with that client. Too many agents give up after the first call attempt or left voicemail.

Defining your process is like defining your success.

You have a

90%

44%

of salespeople give up after one call

It is not about more leads; it is about working the most efficient way possible

DEFINE YOUR PROCESS

Setting your own expectations with leads

Having a plan prior to working with a lead will help you:

- Stay on track
- Formulate predictable results
- Better manage your process & talking points

The two most common types of follow-ups are:

- Calling (Voicemail)
- Email

The following pages give examples of what those messages look like. These are designed for you to take and create your own message. You can read these as is or craft your own.

Most importantly, make sure you are during your due diligence and following-up!

SAMPLE CALLING PROCESS VOICEMAILS

The following examples are for leaving messages when reaching out to a lead. Of course, your method, frequency, and style may differ. Feel free to use, modify, or rearrange these to make them your own.

First Voicemail – Who are you and why are you calling
"Hello prospect. This is ____. I am calling per your request for Medicare coverage information. I can be reached at XXX-XXXX."

Second Voicemail – Calling again – starting the process
"Hello prospect. This is ____. I am calling per your request for Medicare coverage information. I have some further questions for you. I can be reached at XXX-XXXX. If I don't hear back from you by [date] I will try you again."

Third Voicemail – Know you are busy
"Hello prospect. I know you are busy, and Medicare can be confusing. I just need a couple of questions answered when you find time. 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 just helped someone else in your area with their Medicare questions. You may have similar ones we can assist with. 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. 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!"

EMAIL / VOICEMAIL STRATEGY

Each time you leave them a voicemail, you can email them a message like the one below. This can start after the first voicemail you left, or you can start later in the process. For example, after the third voicemail you can send them this email:

New Message

Recipients

Subject Voicemail Message

Dear ___,
I just left you a voicemail message. If it would be easier to communicate via email, please feel free to reply to this message.

Sincerely,
Your Info

Sans Serif

Send

TIPS & FAQ

"If I don't hear back from you by…"
Saying this in your voicemail tells the prospect you will be calling back on a certain date and not just randomly trying to reach them. It also displays to the prospect you do what you say you will do, conveying professionalism.

Do I have to leave a message each time?
Yes. If you do not leave a voicemail people may assume you are a telemarketer or a SPAM call, as they typically do not leave messages.

Can I say/write more in my emails?
Yes, but less is more. The best emails are ones that you have read in their entirety before you realize you have read the entire email. The easier you make it on the prospect to reply without having to think about it, the greater the probability they will reply.

Do not forget! To stay compliant, you must record your prospecting and telephonic appointment calls, save them for 10 years, and read off the appropriate disclaimers within the first 90 seconds of inbound and outbound calls to prospects and clients.

NEXT STEPS

1. Create Your Process
What 6-7 steps are you taking to reach your leads? Write out each step.

2. Print out your voicemail scripts/notes
Having them in front of you when you are making calls can help prevent call reluctance and help you keep on track.

3. Send Email messages
If they are not returning your calls, they may return an email.

4. Review your process
As you gain experience, you may find ways to rephrase or reword your messages for greater results. We suggest tracking and reviewing your process quarterly, so you have data to work with and help you increase your success.

What is working?
What can you change?
Can you change your wording to be more effective?