



Insurance Leads - Pursuit Best Practices

The Insurance industry is telephone prospecting intensive. Purchasing leads is a popular option to cold calling or canvassing, since calling into a lead often improves both ratios of the telephone prospecting process: 'dials to conversations' and 'conversations to appointments.' These improvements are possible because the target is, in theory, warmer. Also warmer targets are referrals, networking and Centers of Influence. Each is warmer, but none are slam dunks and all deserve to be pursued in the most efficient way.

The greatest influence on the outcome of any pursuit is not the lead, per se. The outcome of the pursuit is more dramatically driven by the Best Practice used in the pursuit. An efficient **Best Practice** for the pursuit of a given target will maximize the return on the investment of time spent on the phone. If we are in pursuit of a lead we purchased, the investment has a monetary component and not just a time component.

What is a Best Practice? A Best Practice in Klpz is a pursuit plan, which Klpz automates. The Best Practice can be for the very first pursuit or for a subsequent pursuit. Every Best Practice handles these four topics:

1. How many times to call before we should put the name away till a later time?
2. How frequently to make the calls?
3. If we want to use them, what are appropriate and compelling voicemails and emails to use should you not reach the target? They can be different for each call. (Klpz sends the emails automatically and they do improve the success ratios.)
4. If we do not connect during this pursuit, do we want to pursue again? If so, when? If we did connect, but did not make a sale, do we want to pursue again? If so, when?

To see how easy it is to use Klpz to follow any Best Practice, watch the training video for the unique Klpz *Two Screens and a Mouse* navigation on our website or [click here](#) to watch now.

Below, you will find descriptions of Best Practices for a variety of pursuits. Contact us to load any of these into your account. A starting set is included, but simply call if they are not what you need. When you subscribe to MyKlpz, use the **Promo Code: insurance** to receive the starting set.

Each Best Practice below was developed collaboratively with an insurance professional who is experienced in the segment. Each Best Practice includes voicemails and emails for each step in the pursuit – and we recommend using voicemails for most, if not all of the steps. But, it is your choice. Also, you can change the voicemails and emails, easily. You may also want to make structural changes to the Best Practice – adding a step or removing a step. To learn more about how to do that [click here](#) for a document on our Admin Services.

<p>Promo code: insurance</p> <p>Using this code in the shopping cart at www.contacts-science.com you will receive:</p> <ol style="list-style-type: none">1. Klpz set-up/training for only \$15 (retail \$25)2. Klpz per month for life only \$34 (retail \$39)3. As many Best Practices as you need from Selection Below – Just Call Us to Review <p><i>Klpz is a month to month service, no contract</i></p>

Segment	Best Practice	Description	Status
Medicare Supplement Purchased Leads	New Lead	For the pursuit of a new lead - 6 calls, voicemails and emails for each call, but optional to use only 3 times. The calls are spaced to reflect the need to get started quickly, but not seeming to be too aggressive or desperate.	Active
	Next Pursuit	For the subsequent pursuits of a lead you did not connect the first time – 3 calls, messaging reflects that you did not connect earlier and want to make sure they have received the information and answers they were seeking.	Active
	ReConnect	For subsequent pursuits when you did connect , but did not sell – 3 calls, messaging is offering news about Medicare that might affect them, plus wanting to see how they were doing. The reconnect meeting is often used to introduce another product, but the recommendation is to stick with the original reason you met and open the door to a new offering in a face to face meeting.	Active
	Open Enrollment	Use to call leads you did not contact or sell to remind them about Open Enrollment – 2 calls to leverage the Open Enrollment window to check if they need information about all available options.	Active
Life Insurance Purchased Leads	New Lead	For the pursuit of a new lead – 6 calls, messaging is focused on being local, experienced and having lots of options. Fairly aggressive start.	Active
	Next Pursuit	For the subsequent pursuits of a lead you did not connect the first time – 2 calls	Active
Health Insurance Purchased Leads	New Lead	For the pursuit of a new lead – 7 calls, getting off the mark quickly, calls are a bit more frequent. Messaging centers on being local with experience and lots of options. Fairly aggressive start and a slightly lengthened time span.	Active
	Next Pursuit	For the subsequent pursuits of a lead you did not connect the first time – 2 calls	Active
Cold Pursuits	Cold Calling	For use in the pursuit of an appointment with folks you don't know. Typically, these are from lists you purchase or from contacts.	Active, must Personalize Messages
	Canvas First	For use in the follow-up calls to companies you have 'canvassed' and could not meet with the Decision Maker. You may have met a 'canvas contact' and left literature.	
Pursuits after Conversation	Follow Up	For use in the pursuit of an appointment with folks who you have a Conversation with but could not generate an appointment, but they give you a better time to call them back. Also, used for the same situation when you go on an appointment, but cannot get them into the pipeline.	Active
Marketing	Warm Leads	For use in the pursuit of an appointment with folks	Active,

Leads Pursuit		who have indicated they have an interest. This could result from a marketing campaign or target visiting your website.	must Personalize Messages
Referrals	Referral 1	For use in the pursuit of an appointment with folks who were referred to you. If you do not connect, you would recycle and choose the Referral 2 cycle, which is designed for the ongoing pursuit of Referral targets.	Active
	Referral 2	For use in the second pursuit attempt to generate an appointment with a referral. This cycle has fewer call attempts, plus refers to the past attempts.	Active
Building a Circle of Influence	COI Recruit	For use in the pursuit of an appointment with folks who you would like to enlist to be on the lookout for folks they could refer to you.	Active
	COI Check In	For use in the pursuit of a conversation with a COI who has committed to look for referrals for you.	Active
LTC			Pending

Contact us to lead any, or all, of these Best Practices into your MyKlpz account. If you need one to be tweaked, let us know. You can change the wording anyway you like.