# FOLLOW UP PROCEDURE

## After the Initial Contact Was Made and resulted in No Sale

**A GUIDE TO A SUCCESSFUL FOLLOW UP PROCESS**

# A Guide to the perfect Follow Up Process

## It is imperative that you start adopting these follow up techniques to maximize your profit from each lead order.

The whole purpose of the FOLLOW UP PROCESS is to get the customers back on the phone or to have another meeting with them in person.

Statistics show that there is a high sales success rate after 8-12 legitimate contact attempts.

## Here are some statistics:

35%-50% of SALES go to the person/company who does the first follow-up.

65% of companies admitted in a nationwide survey that they do not nurture leads.

By following up within the first 60 SECONDS of a phone call/ house visit, you will have a 500% increase in lead conversion.

The first company that follows up with a client has a 248% better chance at making a sale than the second or third company that reaches out to them.

Only 37% of companies respond within the first hour of receiving a lead.

You have a 7x better chance at having a meaningful conversation with the key decision maker of a lead if you contact them within the first hour of receiving the lead.

There is a 40% higher conversion rate when you text your client DURING a sales call.

## Where do you stand in the follow-up game?

12% of sales agents make only 3 contacts

2% of sales are made on the first contact
3% of sales are made after the 2nd contact
5% of sales are made on the 3rd contact
10% of sales are made on the 4th contact
80% of sales are made between the 5th - 12th contact

*You need to make a minimum of 5 contacts with each lead.*

# Follow-Up Day 0-75

*After initial contact (No Sale)*

**Day 0-** Simple thank you text (Within 1 hour)

**Day 1-** Call the client and inform them of an “idea”, something that will benefit them.

**Day 2-** Handwritten letter, follow up with an email or text. (Confirm the address)

**Day 3-** Selfie Video offering valuable information (Text and/or email)

**Day 4-** Personal visit offer

**Day 5-** “I thought of you when I saw this” (Article Link - Email, Text or Call)

**Day 10-** Invite them to an event (Charity, event, webinar, ect)

**Day 14-** Send out email or text specific information links/brochure

**Day 21-** Video Email, handwritten note, and phone call

**Day 30-** Event "offer" (Charity, event, webinar, ect)

**Day 40-** Go straight for the heart, "I was thinking about you, I woke up today thinking about you"

**Day 50-** Special Offer (4 Additional Legacy Household members)

**Day 60-** Personal visit "offer"

**Day 75-** Photo Mock up (Client / Agent of the month)

**Always text the customer WHILE YOU'RE ON THE PHONE!!**
**After each follow-up attempt, always follow up with phone call**
**Remember, all of this is giving you *reasons to call them***

# Follow-Up Ideas

The truth about Life Insurance
What is an assignment fee?
VA and it's benefits
What does SSI cover for my burial?
Child Rider (Insure grandkids and kids)
Donation Rider (Donate up to $1,000 to a charity of your choice)
24 Hour Paid Claims
Price shopping and negotiating of the funeral costs (A free service!)
Unlimited beneficiaries
Locked-in prices of funeral merchandise
No blood work needed
Same day approval
Accidental Rider (Doubles the face amount)
Top 5 Mistakes when planning a funeral
Legacy Assurance Testimonial Video
Why Senior Life?
Why pre-need plans are not good
Difference between Term & Whole Life Insurance
Client Testimonials
Why Senior Life Stinks (This is an attention grabber)
Free Tele-doc
Discounts on Diabetic supplies
Hearing aid discounts
Free Discount Prescription Card
Touch-less Policy
Pick your due date (Due date can match SSI)
Pick your premium