Making the Most of Your Leads 2022

1) Organize your leads as soon as you receive them. If you choose to print your leads, separate them initially by area, then town, then zip code. We color code each general area by using colored folders. Each town gets its own folder and the leads inside are organized by zip code.

2) Leads should be attempted to be contacted within 24 hours of you receiving them.

3) By Saturday of each week you should have called and driven by **all** of your new leads for that week. Make sure you are leaving delivery notices if no one is home. Phone calls make appointments, Door knocks make money!!!

4) Update your calendar, momentum sheets, and sold deals tracker daily… The more organized you are, the more money you will make.

5) No VM's should be left unless they are very vague… "Hi, this is Jill calling from the local benefits office here in (TOWN.) You can reach me back at 978-420-2181. Thanks and have a great day."

6) Set your VM message to be vague as well… "Hi this is Jill, I'm either on the phone or with a client right now. Please leave your name, number, and reference number if available and I will get back to you as soon as possible. Thank you and have a great day."

7) Send out Postcards!!! These are gold!

8) Remember this is a numbers game. The more appointments you set, calls you make, doors you knock on, presentations you do, referrals you get, etc… the more money you make!

9) Keep track of your calls, appointments set, door knocks, and results! We have Momentum Sheets/Trackers for this and it will greatly help you improve your production.

10) A "No Interest" just means "Not now"… NEVER throw away a lead; you never know what the future holds!

11) Take **Very Detailed** notes on your leads EVERY time you try to contact them. Ex. "1/30/21 - Jane wasn't home, spoke to husband, asked to cb tomorrow at 4pm, very nice."

12) Make calls EVERY night till 8pm! Everyone is home and you will book your days solid!

13) Lead Credits – 1st step is to look at the "Criteria for Lead Credits" handout to see if the lead is eligible for a credit. 2nd step is to email Danielle at dmason.seniorlife@gmail.com and copy your upline. Explain to her why the lead should be credited. This is up to our discretion when it doesn't fall into the regular criteria.

14) Lead orders go in 3-5 weeks in advance. Please notify us of any upcoming vacations at least that far in advance if possible. Also, if you decide to hold off on taking leads one week, just know that they are being held for you till the following week. Each order is based on 20 leads per agent per week.

15) All leads are a tax write-off.

16) Lead debt will fluctuate greatly and at the beginning may feel very high. You have to allow the flow of this business to take place. **Don't stress about your balances!!!** Every top producer has had some crazy lead balances for months on end. As your production and paid-throughs increase this balance will start going down faster and faster.

17) ALWAYS go through your old, unsold leads when you are working in that town. People tend to be "Serial Mailers" and won't remember when they sent in what card. If you ignore "old" leads, you are throwing away business.

The 5 Step Lead System

1. Doorknock w/Delivery Notice
2. Call with NO voicemail (Try in the AM/PM)
3. Call with NO voicemail (From your cell/house number)
4. Call w/VM
5. Send Postcard (Get postcard stamps)

OR

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