Lead Conversion Process

Lead Conversion

- Not about the scripts
- This is ABOUT following the steps in a proven process to have more QUALIFIED PEOPLE show up on each appointment
- This is ABOUT POSITIONING
- **ABOUT following the process**
- The more qualified people that flow through… the more money you make
- The fewer people…less money

The Numbers Goal

- 100 Leads
- 80 percent show 1st appointment: 80
- Disqualify 50 percent
- 80 percent show 2nd appointment: 32
- Disqualify 50 percent
- 60 percent show 3rd appointment: 9.6
- Take an application on 70 percent: 6.72

The Numbers

- 100 Leads cost: $15,000+
- 6.72 deals at $7000 target = $47,040

Here's the DIFFERENCE!

Step-by-Step Process to Getting Up to 80 Percent to Show on First Appointment by Confirming the Right Way

The Confirmation

- This is a SYSTEM
- SYSTEM = has multiple steps
- Vital to your success in the program
- Every successful agent in the program…over a long period of time…Implements the Confirmation System
- Can be OUTSOURCED if you don't want to do it

The Confirmation System

- Step 1 – Call/Voice mail immediately
- Step 2 – Personal email confirmation (automated)
- Step 3 – Voice mail 24 hours before
- Step 4 – Email reminder 24 hours before
- Step 5 – Text message day of appointment
- Step 6 – Send text if they don't show

Step 1 – Immediate Call/Voicemail

- Use system to call immediately
- If not reached, leave voicemail

Step 1 – Immediate voice mail

- You can call once to try and see if they are available. After testing, we have found this process to work better. Up to 30 percent better for some agents/advisors.
- This helps avoid having to call a million times or call with different numbers.
- You should send once lead is received.

Step 1 – Immediate voice mail

- Voice Mail Script:
  I'm just calling to confirm a phone appointment you set up with [company name/personal name] on [day &time]. Now I'm calling beforehand to let you know that it will be a short call, there's nothing to buy, I'm just going to explain the strategy you had called us about for growing and protecting your ____. So I've got you down on my personal calendar, I am punctual so I'll call you at [time] sharp on the [day] and we'll go from there! Looking forward to talking with you.

Step 2 – Personal Email Confirm

- In addition to a text, send a confirmation email once the lead is received (automated)
- Using multi-media helps make sure they know of the appointment and lock it in on their calendar

Step 2 – Personal Email Confirm

- Hey -

  I'm confirming your requested appointment to talk for a few minutes on [DAY/TIME] about our strategy for growing and sheltering your money from losses and taxes. Now there's nothing to buy. We'll just talk for a few minutes to see if what we do can accomplish the objectives that you had called us about. Just so you know, The 401k Challenge referred you to me so I've set aside time on my personal calendar to talk to you.

Step 2 – Indoctrination Series

- I'm going to send a few articles over the next few days leading up to and after our appointment with more info on the qualified plan problems that are popping up now.

Step 3 – Day Before Apt VM

- Going to send this through system again
- Send the day before the appointment
- Helps if the appointment is a few days away

Step 3 – Day Before Apt VM

- Hey - just a standard reminder about our appointment tomorrow at XX when I'll be explaining our strategy for growing & sheltering your money from losses and taxes that you replied to. Now you are on my personal calendar and I have set aside that time, so I'm looking forward to explaining what we do. We'll be sending you a reminder text tomorrow, and I'll talk to you then!

Step 4 – Day Before Apt Text

- IF you want, you can add the number you will be calling from so now they recognize it. Not necessary, yet it can help.

Step 4 – Day Of Apt Text

- [AUTO-REMINDER] The professional we've referred you to will call TODAY at XX pm per your request to briefly explain our strategy for growing and sheltering your money from losses and taxes. PLEASE have your phone ready and we hope you find the info useful! Thanks!

Step 5 – If You Have a No Show

- Hey [name] forgive the text but did something happen? Maybe it's my fault and I messed up the time but I called today at 7:30 pm per your request to talk about our strategy for growing and sheltering your money. Do you still wish to talk? If so, what day/time should I call back? Thanks.