

FILLING YOUR SALES PIPELINE



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**WHAT IS A SALES
PIPELINE?**

**WHAT IS NOT A
SALES PIPELINE?**

**A HOLDING PLACE FOR PROSPECTS
THAT HAVE A POTENTIAL TO CLOSE
IN THE FUTURE BECAUSE YOU
KNOW EXACTLY WHY YOU ARE
CALLING THEM**

**A RANDOM LIST OF PEOPLE YOU MIGHT
CALL BACK IN THE FUTURE IN CASE
THEY MAY WANT TO BUY FROM YOU
THAT DO NOT HAVE NOTES OR A
POLICY EXPIRATION DATE**

- **TALK TIME! SUCCESSFUL SALES AGENTS AVERAGE 3+ HOURS OF TALK TIME A DAY**
- **REASONS TO CALL:**
 - **INSURABILITY**
 - **X-DATES**
 - **CONTINUOUS COVERAGE**
 - **RATE CHANGES**
- **TIE DOWNS:**
 - **MORNING/AFTERNOONS?**
 - **SET CLEAR FOLLOW UP PLANS**
 - **ASSURE THE CLIENT YOU WILL REACH BACK OUT**

HOW TO FILL YOUR PIPELINE



- **USE YOUR SALES MANAGEMENT TOOL WITH EVERY PROSPECT DAILY**
- **LEAVE GOOD NOTES, BE INTENTIONAL WITH FOLLOW UP**
- **WORK YOUR CALENDAR ALL DAY EVERY DAY**

HOW TO MANAGE YOUR PIPELINE



- **TEXT AT THE FRONT OF THE CALL.
SEND TEXTS FOR APPOINTMENT
REMINDERS**
- **SET APPOINTMENTS AND TASKS IN
YOUR SALES MANAGEMENT TOOL FOR
THE NEAR AND DISTANT FUTURE**
- **ALWAYS CHECK YOUR CALENDAR AND
CALL WHEN YOU SAY YOU WILL CALL**

HOW TO MANAGE YOUR PIPELINE



- **LEAVE EFFECTIVE VOICEMAILS IF THEY DON'T ANSWER**
- **SUMMARIZE THE LAST CONVERSATION WITH DETAILS**
- **KNOW YOUR WORD PATH AND ASSUME CLOSE**

HOW TO FOLLOW UP WITH YOUR PIPELINE

