



LEAD SOURCE

WORD PATHS



LEAD SOURCE: **MONO LINE CUSTOMERS**

- OFFER A MINI REVIEW
- DON'T SPEND A LOT OF TIME RESEARCHING THE CLIENT
- SPEAK ABOUT MISSING DISCOUNTS
- ASSUME THE QUOTE
- STATE THE BENEFITS FOR HAVING ALL POLICIES IN ONE PLACE

"WORD PATH: "Hey Mr. Customer thank you for being our client since 2001. After reviewing your current home policy, I noticed that you are missing our biggest discount. What kind of cars do you own? Or do you own or rent this home?"

LEAD SOURCE: **UNSOLD QUOTES**

- RECONNECT ON A PERSONAL LEVEL
- SKIM YOUR NOTES FROM THE PREVIOUS RAPPORT BUILT
- FOLLOWING UP BUILDS TRUST
- ASSUME THE QUOTE

WORD PATH: "Hi this is (your name) I'm calling from Allstate. We've worked with you in the past, and a lot's changed since then. I have your information here: Do you still live at 1234 Main St.? Do you own or rent that home?"

LEAD SOURCE: WINBACKS

- TREAT THE CLIENT LIKE AN OLD FRIEND
- ACKNOWLEDGE CHANGES AND IMPROVEMENTS
- CONFIRM DETAILS AND ASSUME THE QUOTE
- BE PREPARED TO OVERCOME OBJECTIONS
- THESE ARE EASY LEADS TO CALL AS THEY ALREADY KNOW WHO YOU ARE

WORD PATH: "I'm calling because we worked with you in the past and a lot has changed since you left. I have your information up. Do you still live at 123 Main Street, do you still drive a 2020 Tesla? I already have the quote started. This will just take a few minutes."

LEAD SOURCE: **COLD PURCHASED LEADS**

- THEY ARE NOT RECEIVING AS MANY CALLS
- CALL MULTIPLE TIMES A DAY
- FOLLOWING UP IS KEY
- THESE LEADS ARE PRICE SHOPPERS, LEAD WITH VALUE
- SELL WITH CONFIDENCE: THEY REQUESTED THE QUOTE, YOU HAVE THEIR INFORMATION

WORD PATH: "Hey I see you requested a quote. Good news is I already started the quote and it will only take a few minutes. Who are you currently insured with?"

LEAD SOURCE: **NEGLECTED FOLLOW UPS**

- FOLLOW UP WHEN YOU SAY YOU WILL
- PERSONALIZE YOUR FOLLOW UP
- FRIENDLY AND EMPATHETIC TONE
- BE PERSISTENT - IF YOU DON'T CLOSE THEM ANOTHER AGENT WILL

WORD PATH: "Hi [Lead Name], this is [Your Name] from [Your Company]. I wanted to follow up with you this will only take a few minutes"