



melon local



How to turn leads into customers.



How to follow up with internet leads.

At Melon Local, we're the experts at helping insurance agencies attract quality leads to their businesses. But we couldn't stop there. We wanted to find out how insurance agents can best follow up with those new leads to close more sales. So, we did our due diligence. We researched the best tactics and talked to award-winning professionals in the insurance industry to come up with a replicable process proven to get results.

Here's what we came up with.

Once we compiled the hottest tips from insurance agents, we had one review our process to make sure it was up to par. Now, we're sharing this agent-approved process with you so that you can earn more policyholders and grow your business.



1. The Initial Call

Ah, the first call. This is your first opportunity to make contact with a potential customer. Make sure you have the quote ready for the prospect so that you can go over the price with them on the call or mention it in your message. If you're sent to voicemail, keep these tips in mind:

- A lot of people prefer to read their voicemails, so it's vital the smartphone is able to translate your voice dictation easily.
- Mention your agency's location so that your lead can find you in the future.

2. Send a Friendly Text

Let's face it. These days, many people prefer the convenience of texts over phone calls. So, make things easy for potential customers by texting the quote and call back information. There are three ways you can do this:

- Simply text your name, agency and the quote with a message to contact you.
- Print out the quote, take a photo and text it to the prospect along with your call back information.
- Text a contact card with your information. Seeing that you're a real person can help inspire trust in you and your agency.



3. Hit Their Inbox

No luck on the phone? Take it to the computer. Make sure you include the following in your email:

- Put the price in the subject line so it reads:
(name of agency) Quote - \$XXX per month!
- Attach a PDF of the quote for your prospect to review.
- Make the email brief but personal. You want to find a balance between professional and friendly.

4. Send a Letter

Some people, especially older people, prefer communication through the mail. Follow these tips to make your snail mail get results as fast as possible.

- There's something special about seeing a handwritten letter in your pile of mail. Make sure you handwrite the prospect's address and return address to increase the open rate.
- Include a copy of all applicable quotes.
- Place a sticky note on the quote that lets the prospect know that additional discounts may be available.

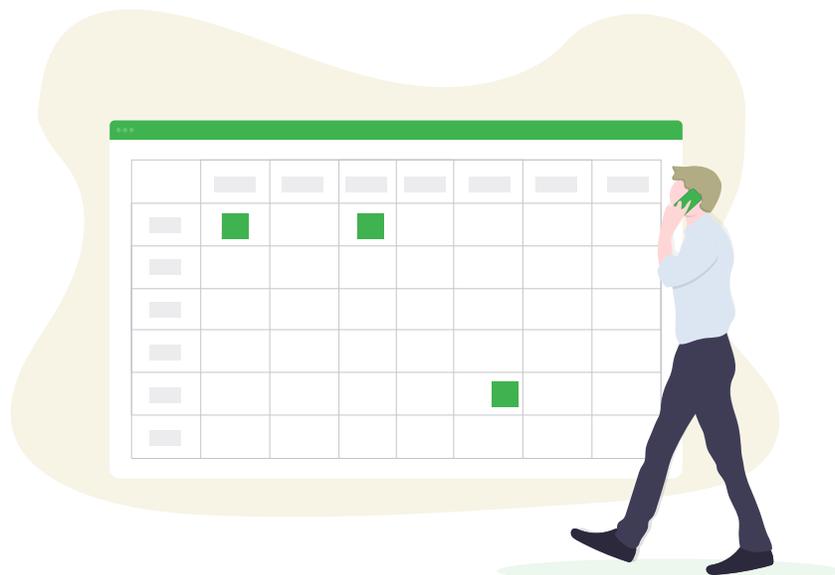


5. Two-Day Follow-Up Call

After you've allowed for enough time for the prospect to receive your letter, wait two days before calling. Follow the tips we outlined in step one to increase the likelihood of a callback. **Persistence gets results!**

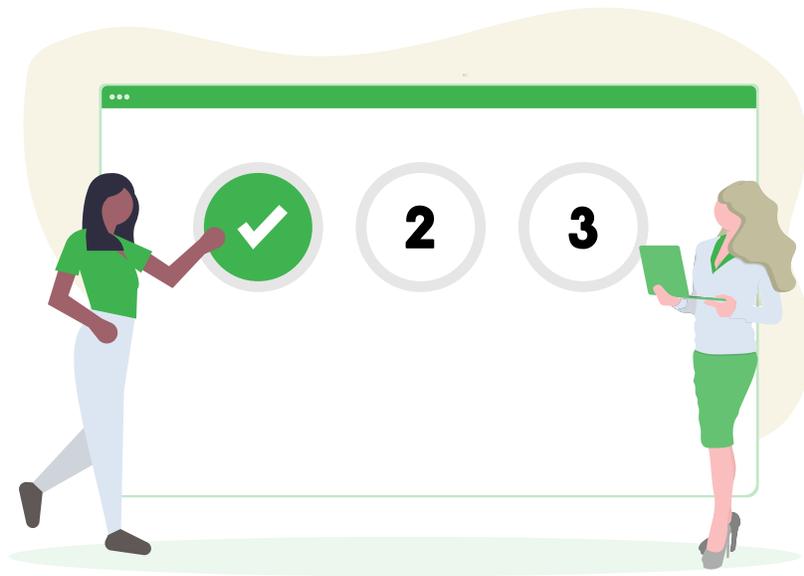
6. 30-Day Follow-Up Call

Before letting the lead fizzle out, we encourage your team to give the prospect a final call. Wait 30 days after your last call to give your future customer some time to weigh their options. They're likely speaking with other agencies, but by **simply keeping up with the prospect**, you increase your chances of securing the sale.



The Final Word

Our industry sources emphasized that individual agencies need to figure out what works best for them through trial and error. Some agencies may choose to follow this proven process **step by step** while others may want to include additional follow-up calls. Insurance agents have cautioned us to keep in mind that the more follow-up calls your process requires, the fewer leads you are able to get on a daily basis. **Now, go on and make those sales!**





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