
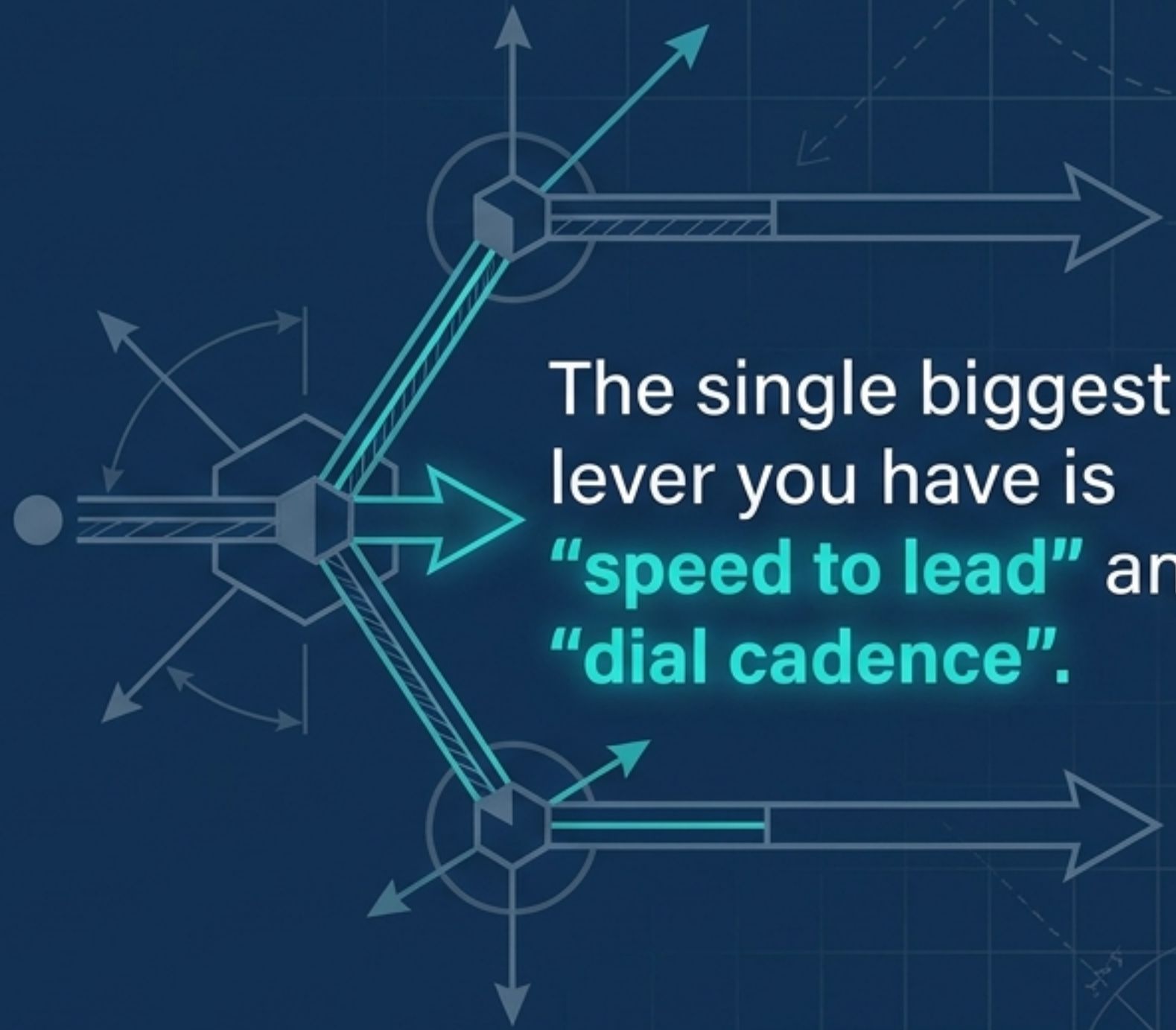


The background of the image is a dark blue gradient with faint, light blue architectural blueprints. The blueprints include floor plans with rooms labeled 'BEDROOM', 'BATH', 'LIVING ROOM', and 'KITCHEN'. There are also technical drawings showing structural elements like beams and columns, and various dimension lines and annotations. A grid pattern is visible in the top left corner, and a circular arrow indicates a rotation or cycle.

# How to Book More Insurance Appointments From Leads

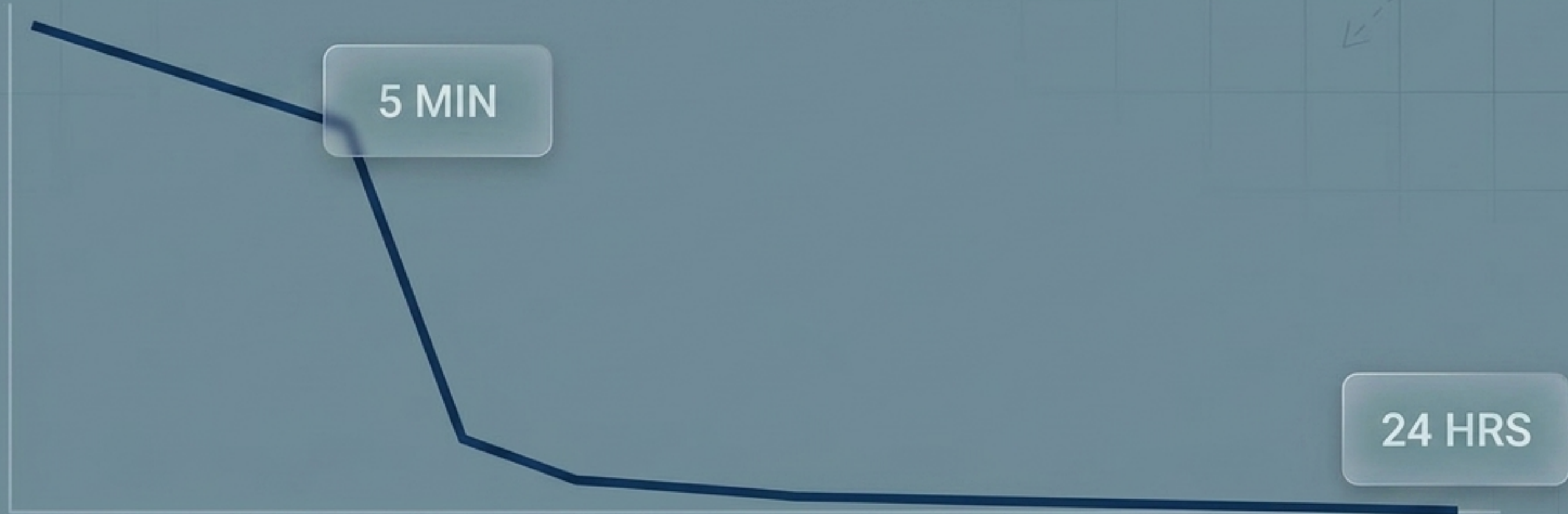


**Most agents do not have a lead problem. They have a contact problem.**



The single biggest lever you have is **“speed to lead”** and **“dial cadence”**.

# The Conversion Cliff



A lead contacted within **five minutes** is **dramatically more likely to convert**.  
After **24 hours**, the conversion rate falls off a cliff.

Your calendar gets organized around this rule, not the other way around.

# The 7-Day Blueprint Cadence

**8-9  
TOUCHES**

After day 7,  
move to long-term nurture.

Call within 5 mins +  
Voicemail + Text.  
Second attempt 4-6 hrs  
later (missed call).

DAY 1

Mid-morning call  
+ Short text.

DAY 3

Final call +  
Closing text.

DAY 7

Morning call +  
Late afternoon call.

DAY 2

Early evening call.

DAY 5

# Data-Driven Dial Blocks



The data is clear. Schedule your dial blocks against the data, not against your personal preference.

# Cadence Protection Rules



One Owner. The same person who handles speed to lead handles the cadence to maintain momentum.



Log Every Dial. If you cannot tell from your CRM how many times a lead has been called, you are flying blind.



Hard Stop at Day 7. Endless dialing burns the lead and burns you.

**MEDICARE RULE:** The cadence applies only to leads who granted prior permission to contact. No exceptions.

# The First 30 Seconds: Earn the Next 60

Hi, this is Sarah from the agent office, calling for Mrs Johnson.

*Name*

I have got just a couple of quick questions to make sure I send you the right information.

*Time Limit*

I am the agent following up on the request you submitted online about Medicare coverage.

*Topic*

Is now an okay time, or would later this afternoon be better.

*The Out*

People who feel cornered hang up. People who feel respected keep talking.

# The Three Qualification Questions

1

Are you currently enrolled in any coverage right now, or looking at options for the first time?

*Surfaces New vs. Existing*

2

What made you reach out today? Is there something specific that prompted the request?

*Surfaces the Trigger Event*

3

Are you the only one looking at coverage, or is there a spouse or partner involved?

*Surfaces Decision Authority*

**Three questions.  
Ninety seconds total.  
Then go straight to the close.**

# The Two-Option Close

Based on what you just told me,  
the right next step is a 15-20  
minute review... I have an opening...

TOMORROW AT 10 AM

THURSDAY AT 2 PM

Always offer a choice between two specific slots.  
Never ask "when is good for you," because "when is good for you" is never.

# No-Answer Protocols

**23  
SEC**

Name yourself, name the reason, give the callback path, and announce the text. Voicemails over 30 seconds get deleted.

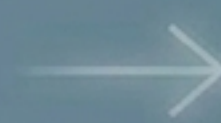


**2  
MIN**

Sent within two minutes of the voicemail. Short. No links. No emojis. The text is a doorway, not a pitch.

# The “Send Me Info” Pivot

The wrong move: Agreeing and sending a generic packet.



I would love to, and the reason I am asking the questions first is that the information depends on your situation.

If I send a generic packet, half of it does not apply to you.

Give me five minutes on the phone and I will send you exactly what fits, nothing extra.

Most leads accept. If they don't, send a short overview and follow up in two days.

# The Lead Qualification Matrix

**HOT**

**WARM**

**COLD**

Real trigger/urgency

Interest, no urgency

Clicked, not ready

Gets the calendar slot first

Booked later in the week

Short follow-up sequence, ask later

Qualification is how you sort. Not every lead deserves the same effort.

# The 48-Hour Booking Window

Offer two times in the next 48 hours. Beyond that, life happens and the appointment quietly becomes a no-show.

**48 HRS**

- ◆ Schedule Pushback: Do not collapse. Offer two alternative specific times.
- ◆ The “Think About It”: Ask specifically: ‘Is it the timing, the coverage, or the cost?’
- ◆ Disqualify with Respect: If they aren’t eligible, say so cleanly. Earn referrals through professional honesty.

# The 3-Touch Confirmation Sequence

**IMMEDIATE**

Calendar invite or email in the first 60 seconds.

**DAY-OF**

Morning text. 'Reply Y to confirm.'  
This reply doubles the show rate.

**15 MIN**

A short text or call to signal presence and respect for their time.



**Booked Appointment**

If no reply to confirm messages, assume risk. Dial anyway with a rebook script ready.

# Install the Math



**Set the 5-Minute Rule Today.** New lead alerts go to your phone, and you make first contact within five minutes during business hours. No exceptions.



**Print the Scripts.** Print the opener and three questions on a card. Read it word for word on your next ten lead calls until it sounds natural.

Your booked-appointment count will start moving inside the first day.