

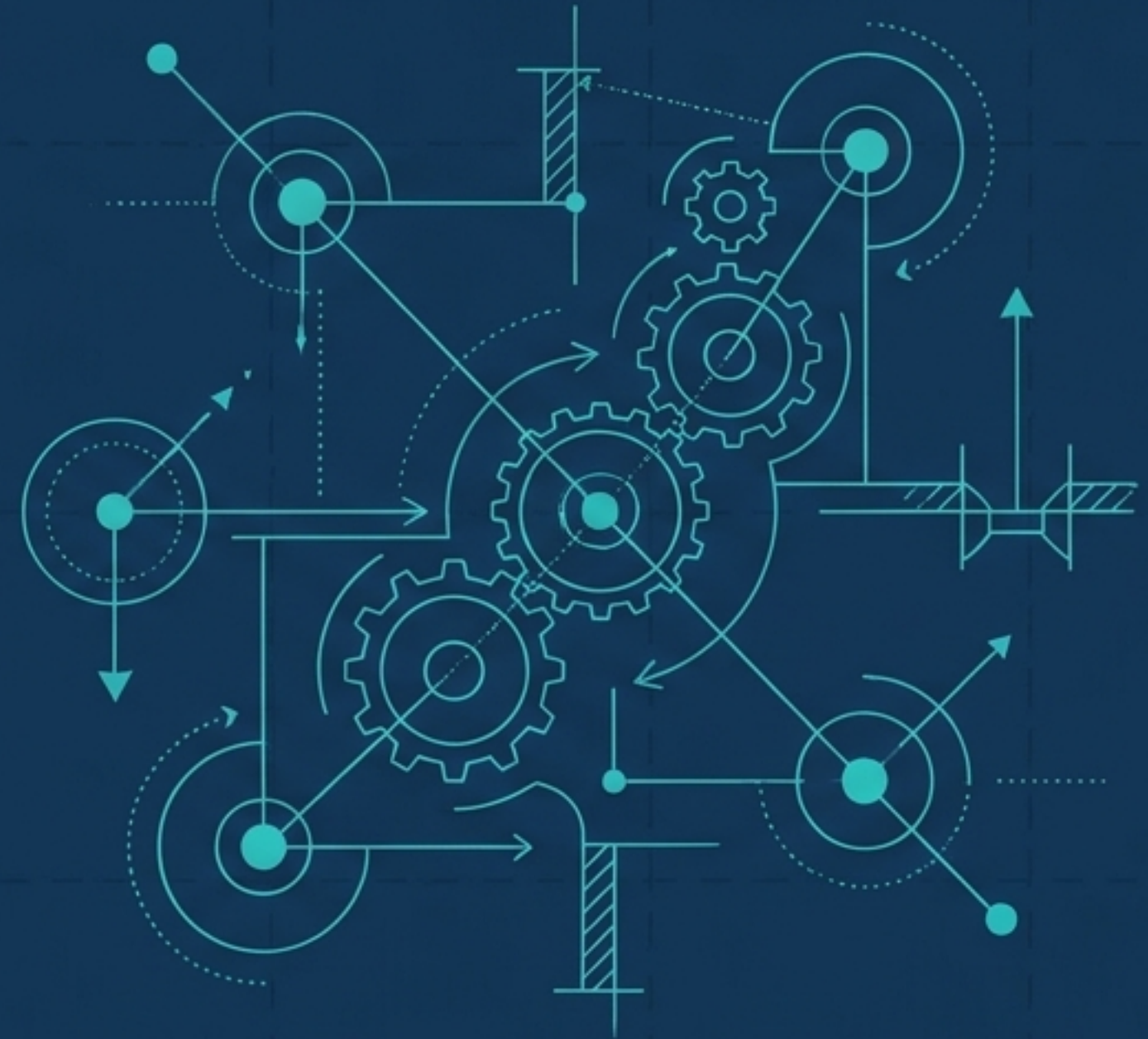
Insurance Follow-Up That Converts Leads

Talent vs System

The agents who close the most are not more talented.

They run a precise, day-by-day follow-up mechanism.

A predictable system yields predictable results.



The Conversion Truth



5

Most sales happen after the first no. The agent still standing at the fifth attempt is the agent who wins.

Present, Not Persistent

- Half of all closes happen after the fifth contact.
- The average agent gives up after one or two attempts.
- Quitting early tells the lead you do not want their business.



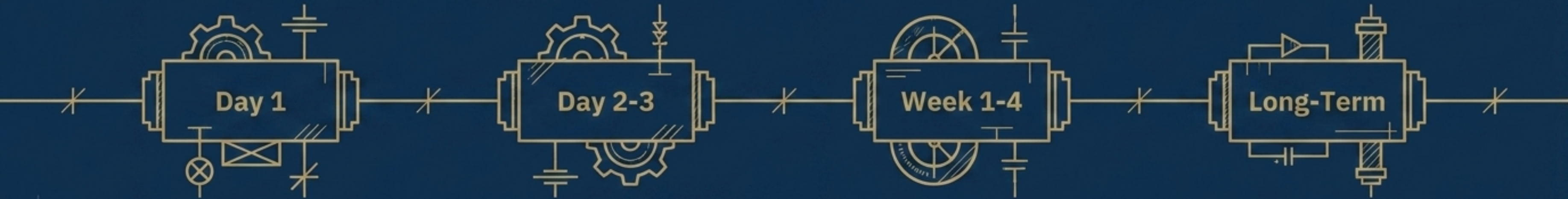
50%

Reframe the Silence

- Silence is not a no
- Just a busy person
- Wrong message feels pushy

- Following up is expected
- Helpful cadence feels professional
- The fortune is in the follow-up

The Conversion Cadence



Stage 1: Speed to Lead

15 MIN

Peak interest happens in the first few hours.

Call within five to fifteen minutes.

Always contact on day one.

Day 1 Playbook

Call to confirm request and book appointment. Do not sell on phone.

Short Voicemail

Short Text

Short Email

Stage 2: Days 2 & 3



- ◆ Make one phone call each day at different times
- ◆ Day 2: Pair call with a short text message
- ◆ Day 3: Pair call with a helpful primer email
- ◆ By end of day 3, lead has 6 touches across 3 channels

Stage 3: The Downshift

Move to one meaningful contact per week

Week 1: Phone call and voicemail

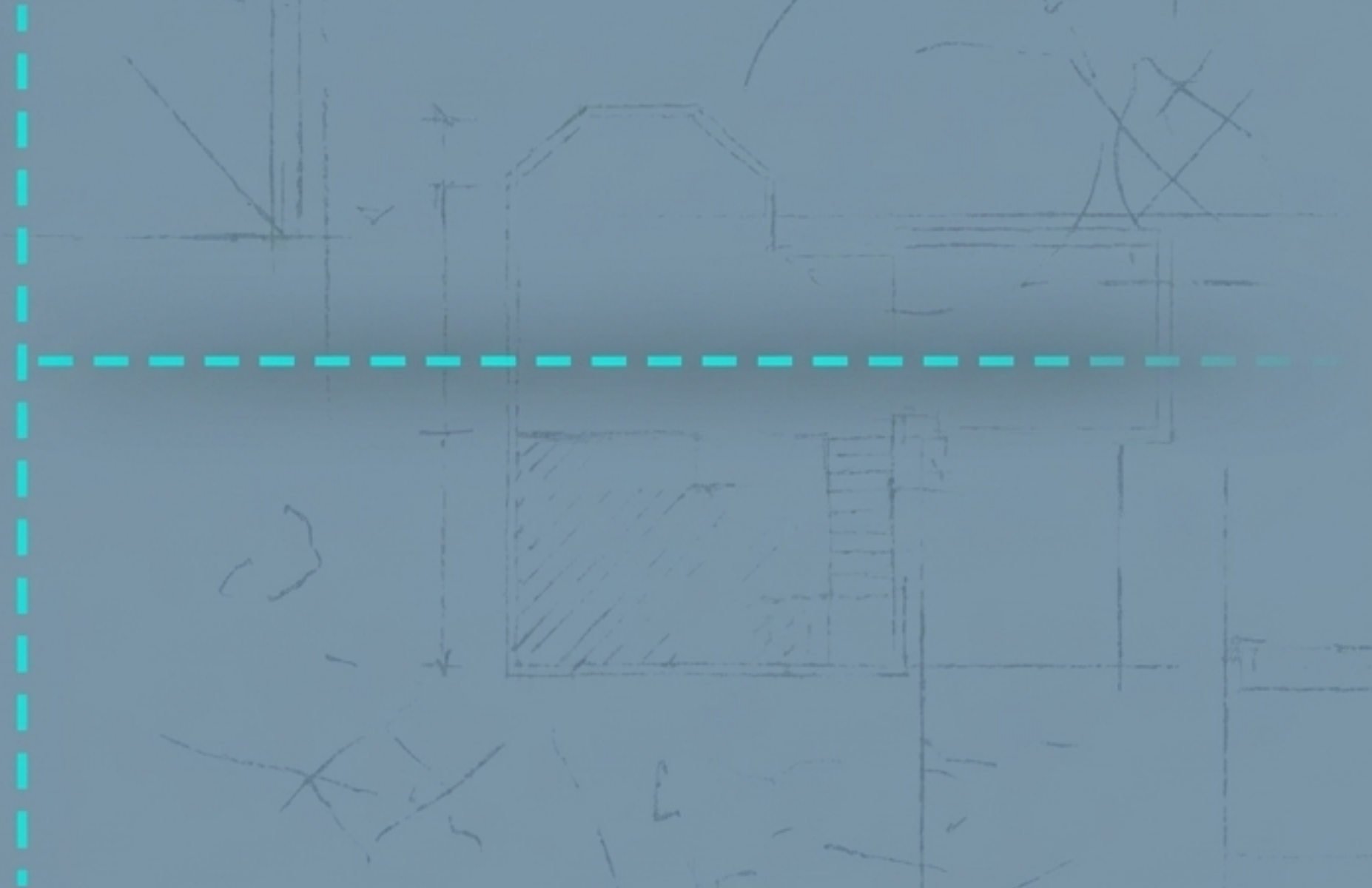
Week 2: Check-in text message

Week 3: Value-driven email on enrollment

Week 4: Final weekly phone call

Stage 4: Long-Term Nurture

- ◆ A lead over thirty days old is not dead, just not ready.
- ◆ Shift to **one light monthly touch**.
- ◆ Monthly tip, birthday text, or **enrollment window check-in**.
- ◆ Stay **top of mind** for the next 12 to 18 months.



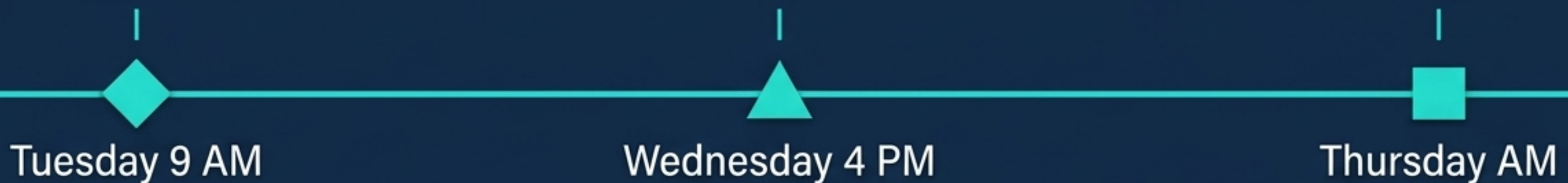
The Walkthrough: Days 1 to 3

Tuesday 9 AM: Inquiry received

Tuesday 9:15 AM: Call, Voicemail, Text, Email (Touches 1-3)

Wednesday 4 PM: Call, Text (Touches 4-5)

Thursday AM: Helpful primer email (Touch 6)



The Win at Touch 6



Client calls back **Friday morning**.

Apologizes for being swamped,
books appointment.

Agent secures client **exactly
where** most agents quit.

The Alternative Ending



Lead does **not engage** in first 30 days.
Moved to long-term **monthly nurture**.

Eight months later, a quick check-in sparks a reply.

Client enrolls in **October** solely because the cadence kept running.

Your Action Step

- Build the 4-stage cadence as a CRM template today.
- Audit your pipeline for the last 60 days.
- Re-enter any untouched leads into the appropriate stage.
- Run the system daily.