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How to turn leads into customers.

Advice from a Top Insurance Agent



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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 talk to someone who is an expert in what to do with those leads once agents get ahold of them to provide resources for businesses like yours. So, we found an award-winning insurance agent to give us the scoop on his effective six-step internet lead process.



Meet Perry Olson.

With more than a decade of experience under his belt, Perry has built a booming, multi-office insurance agency staffed with some of the best professionals the city of Las Vegas has to offer. It's safe to say he's acquired a wealth of advice on how to grow an insurance agency in the digital era. And lucky for us, we got to sit down with him to pick his brain.

Perry outlined his successful **six-step process** for warming up and securing internet leads. Now, we're sharing all the details with you.

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. Perry suggests 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.

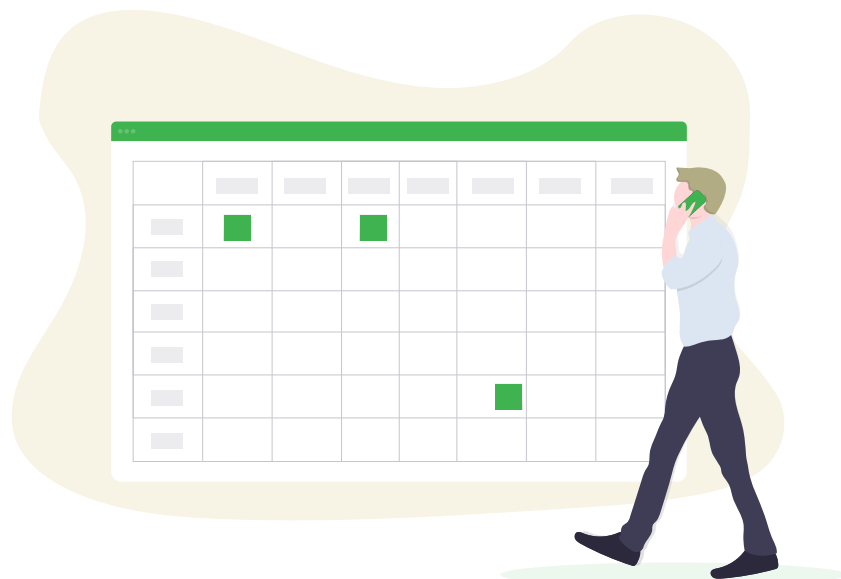


5. Two-Day Follow-Up Call

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, Perry encourages 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

We asked Perry what insurance agents can do to yield the best results from this process.

“Persistence and resilience are essential. You may not always get the sale on the first try, but you just might on the fifth or even the sixth attempt.”

– Perry Olson, Insurance Agent

Perry also encourages individual agencies 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. He just cautions agencies to keep in mind that the more follow-up calls your process requires, the fewer leads you are able to get to on a daily basis.



Perry Olson

Insurance Agent

Perry Olson has been a successful insurance agent for 14 years and has grown his agencies to **over 10,000 households** and **25,000 policies**. When he started his career, Perry employed only one team member. Within his company, he now employs more team members than any other agent in the nation.

This accomplished insurance agent got his start as a new market agent. Throughout his career, he has won multiple awards from his company and from the insurance industry as a whole. Perry is a member of the **Multiple Million Dollar Round Table** and **The National Association of Insurance and Financial Advisors**.

Perry opened his second new market agency in January of 2014. He became one of the first agents with his carrier to qualify for the company's **top 50 agencies** in both his offices in the same year. Perry made history again in 2017 by qualifying both offices for **Trophy**, which names the top 10 agencies in the company.

Let's just say, we trust this guy's process.



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