SECURE AGENT MARKETING

PRE-SET APPOINTMENT SUCCESS GUIDE

PRE-SET APPOINTMENTS

An appointment set on your calendar is the goal, right? All you have to do is show up and talk!

Appointments are the shiny new lead in the industry. There are a lot of tools you can use to get these appointments: automations, funnels, Calendly, etc. The question is, how do you start getting these appointments?

This resource will overview how to pivot your assets to focus on appointments, how to close more pre-booked appointments, and include insights on our appointment options.

1: WHY IS THIS WORKING?

Why are pre-set appointments working more than ever? Since COVID, the market has become more comfortable doing business virtually. There's an increase in trust that wasn't there before, and it's more convenient to hop on the computer and join a meeting than driving down the street.

We've also seen a shift in the market where the consumer now desires a sense of control. The pandemic resulted in mass feelings of helplessness and uncertainty, and now, consumers are embracing the opportunity to control a situation. So, being able to pick the exact time they'll talk to you, rather than waiting on your call, allows the consumer to feel in control of the situation.

2: PIVOTING YOUR ASSETS

You likely have a website, landing pages, campaigns, social media, etc., already created. What's the point? A website is just a website if it doesn't have a clear call to action. How do you pivot these resources to push appointments?

ACCESS YOUR CURRENT STRATEGY

1. Look at each of your assets and figure out their purpose. You need to understand the point of your assets if you want the consumer to know what you're asking them to do.

2. Begin to pivot! Give the option to complete a generic lead form and the option to book an appointment. In an ideal funnel, you're capturing leads

3: PURCHASING APPOINTMENTS

If you want to lean heavily into appointments, there are more strategies to take on other than pivoting your assets. For example, certain businesses will allow you to purchase appointments at a set quantity and price. This is a great way to go, but you may need to pivot your sales strategy to be set up for success. If you're looking for a branded strategy, we recom-mend pairing with the largest digital marketing agency in the insurance industry; we can put in a good word for you.

4: HOW TO PREPARE FOR APPOINTMENTS

You can't approach a pre-set appointment with your go-to pitch. We see agents do this time and time again, and they fail. Most pre-set appointments require an acknowledgment of the process.

WHAT ARE THE CONSUMERS APPOINTMENT EXPECTATIONS

You need to provide for the client and then offer a solution to be successful.

WHAT DO YOU NEED TO LEARN?

If the consumer comes to the appointment with a list of questions about their particular state, you need to know the answers! So, take the extra time to study or freshen up on the details for the best success.

DON'T REINVENT THE WHEEL.

If you purchase appointments and receive a script, don't deviate from it. A script is being provided to you because it works! You may be the best in class at selling your product, but that doesn't mean you will be number one at closing appointments.

5: WHAT TO DO IF THE LEAD NO-SHOWS

If your appointment no-shows, don't give up. Someone found whatever you are selling valuable enough to meet with you. That's a high intent lead, so work it like one! At the minimum, we suggest the following:

WANT TO HEAR ABOUT OUR PRE-BOOKED APPOINTMENTS? KEEP READING!

RETIREMENT FUNNEL

Are you licensed to sell annuities or securities? If so, we have the appointments for you! Want to learn more? Give us a call at (833) 402-4368.

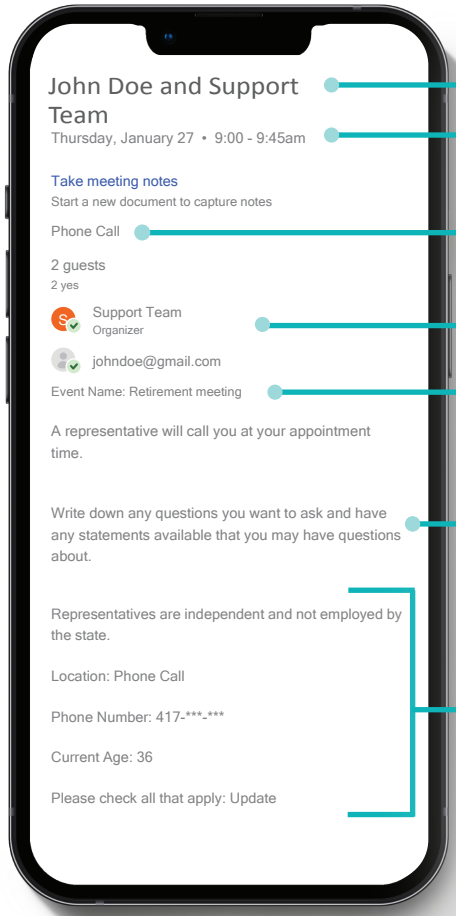
WHAT TYPES OF PEOPLE TO EXPECT

Each lead will have their own questions and interests. Lucky for you, we have your back. When you receive the appointment on your calendar, we will also provide you with the lead's particular interests. Here are the interest indications the funnel is identifying:

- **New employee**
- **Close to retirement**
- **Investment advice**
- **Rollover questions**
- **Social Security/Medicare**
- **TRS/OSP**

RECEIVING THE LEAD

Great - you got an appointment! Here is the way you will receive the lead information:



Meeting Title: Indicates the lead's name

Meeting Details: Shows day, date, and time of appointment

Phone Call: Indicates that this is a phone call rather than a Zoom meeting

Guests: The lead's email will be shown here for future follow-up

Event Name: All meetings will be labeled as "Retirement Meeting" (remember, this is the type of conversation the lead is expecting)

Lead Questions: Any specific questions the lead wants answered will be shown here

Lead Information: The lead's phone number, age, and specific interests will be shown here.

NURTURING THE LEAD

This conversation is expected to be virtual from beginning to end. The FIRST touchpoint should be a phone call. After the phone call, you can set the follow-up appointment or next steps via Zoom or any other preferred method.

HOW TO PREPARE

This conversation starts as a retirement conversation. That means you need to be prepped and ready to go with some basic information for the states you're working in.

EXTRA TIPS + TRICKS

1. Always schedule the second appointment on the first call as a rule of thumb. Never leave it up in the air.
2. Take a consultative approach. The common theme of being ghosted is that the first meeting was too "sales-y" and felt like a sales cycle.
3. Record your appointments (if legal in your state). Self analyze and be self-aware.
4. Don't deviate from the script. This script has proven success.

LET'S GET STARTED

Thank you for choosing to partner with us. We are excited to get to work with you. If you have any questions, please reach out to your project manager and we'll be happy to asssist you. To partner with us on other projects, please scan the QR code.