



BUILDING A SCALABLE LEAD PORTFOLIO

So many lead types...but what mix is right for you?

AGED - PER LEAD

General Internet
Facebook
Google (PPC)
SEO
Callbacks

REAL-TIME EXCLUSIVE

Facebook
Google (PPC)
SEO
Live Transfer
Direct Mail/Seminars
Appointment Setting

WHAT ARE INDUSTRY KILLERS IN YOUR VERTICAL UTILIZING?

Most “killers” utilize a mix of different lead types.

- Aged leads are either being tossed to new agents to cut their teeth on or dumped into an automation series to try to refresh them to a hot lead.
- Per Lead Orders, including callbacks, and Real-time leads are being generated for all sizes of teams and represent a different portion of the mix based on team size and experience. The larger the team and the more experienced, the less these lead types are represented in the mix.
- Live Transfers are being utilized by large teams and call centers of all sizes.
- Direct Mail is primarily being used to generate seminar registrations or to target leads in the Mortgage Protection market.
- Appointment setting is the primary way agents that focus on retirement leads (annuities, roll-overs, etc.) are producing.

THINGS TO CONSIDER WHEN DETERMINING YOUR MIX:

1. How do you sell? In-person vs. Phone
2. Scripting - A quality script can make all the difference over the phone.
3. Quantity vs. Quality
4. Expectations of how the leads typically perform
5. Dedication to a repeatable process