



SECURE AGENT MARKETING

MEDICARE TELESALLES/VIRTUAL
CASE STUDY





1: THE MARKET IS MOVING

The Medicare market is moving very quickly to virtual and telesales.



Important Note: This DOES NOT MEAN in person, local sales fueled by seminars/leads are not amazing ways to grow your Medicare business!

Why is this happening?

- After COVID, the market is more willing to do business virtually than ever!
- The main limiting factor in scaling and growing is the market size
- The opportunity is SO LARGE that there are not enough local agents to meet the demand

With that said, let's talk about **SCALING Medicare!**

2: MEDICARE STRATEGIES

There are 2 main strategies leveraged currently:



Predominately outbound
with a focus on leads



Predominately inbound
with a focus on inbound calls

Most groups are using somewhat of a hybrid approach with the budget being the main determining factor of acquisition strategies. **Example: Bigger budget = more inbound than outbound.**

3: CASE STUDY

Let's use a small LOA virtual/telesales Medicare shop as our case study.



3 AGENTS



1 MANAGER



SELLING MEDICARE ADVANTAGE

AGENT	RAW CALLS		BILLABLE	BILLABLE%	SALES	SALES %	TOTAL HOURS			
	OUTBOUND	INBOUND					ACTIVE	PAUSED	LIVE	TALK TIME
AGENT 1	128	170	83	48.82%	18	21.69%	84:34:57	24:08:24	60:26:33	50:27:04
AGENT 2	93	204	68	33.33%	11	16.18%	81:18:44	31:06:23	50:12:21	37:35:25
AGENT 3	153	206	114	55.34%	11	9.65%	85:52:45	22:56:54	62:55:51	50:18:38
TOTAL	374	580	265	45.83%	40	15.84%	251:46:26	80:11:41	173:34:45	138:21:07

LET'S LOOK AT THE NUMBERS

Inbound Calls: 580

Cost: \$10,600

Billable (>120 sec): 265

Sales (40 Deals): \$265 CPA

Billable %: 45.69%



• New agents, new manager, only up from here!

• Can get leads instead of \$40 inbounds (at least 50 per week of inbounds)



Map out your strategy: It's important to have a clear understanding of what leads you'll be working, how you're working them, and the systems you have in place (automations, CRM, etc.)

Crunch the numbers: Everything is a numbers game. There's always a learning curve when taking on a new strategy, so don't pull the plug too quick, but consider what your target CPA is and make sure you're heading towards it. An inbound call may cost more upfront but could pose a better CPA than an outbound.

Recruit into the strategy: If you find something that works for your team, lean into it! You have the numbers to figure out how many ads spend to dedicate to each agent, so keep hiring and grow your agency!

WANT TO LEARN MORE?

We are passionate about educating others on what marketing strategies are trending in the industry. If you want to learn more about the virtual strategies discussed today or even want us to create a custom marketing strategy for you, click or scan the QR code!

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SECURE AGENT MARKETING

RETIREMENT/LIFE CASE STUDY

Virtual strategies are making a huge impact now more than ever - and booking appointments is a large component of it. Retirement in particular is being taken by storm utilizing appointment setting.



1: CAMPAIGN STRUCTURE EXAMPLE

Budgets can vary when it comes to appointment setting. The key is figuring out how many meetings you want each agent in and working from there.

Let's look at a sample budget!

 **Budget:** \$5,000 per month  **Target KPI:** 40 shown pre-booked appointments

Once you have a goal number to hit, it's time to figure out who and what you're targeting.

2: TARGETING

Riches are in the niches, the more niched you target, the more your specific call to action resonates with that audience.

POSSIBLE TARGETING INCLUDES:



Geographic Targeting: Counties, zip codes, states, etc.



Large groups of people with a specific problem your product solves



Demographics that fit your product (age, income, habits, interests)

3: TARGETING EXAMPLE

Here's an example of how targeting can look:





4: CALL TO ACTION EXAMPLES

After you determine your target audience, it's crucial to create a CTA (call-to-action) that will appeal to their needs. Here are some examples of effective CTAs:



5: LOGISTICS OF APPOINTMENT DELIVERY

Here's an example of how you can set up the appointment to come in:

The smartphone screen shows a meeting appointment form for "John Doe and Support Team". The form includes the following fields and callouts:

- Meeting Title:** Indicates the lead's name (John Doe and Support Team)
- Meeting Details:** Shows day, date, and time of appointment (Thursday, January 27 • 9:00 - 9:45am)
- 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 (Support Team Organizer, johndoe@gmail.com)
- 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 (Write down any questions you want to ask and have any statements available that you may have questions about.)
- Lead Information:** The lead's phone number, age, and specific interests will be shown here (Representatives are independent and not employed by the state. Location: Phone Call. Phone Number: 417-***-***. Current Age: 36. Please check all that apply: Update)

Before you start, consider that following:

- Automations - make sure you have a follow-up system in place
- Choose your tech to deliver (ex: Calendly, Hubspot calendar, etc.)



6: HOW TO WORK THE APPOINTMENT

If you have all of this set up properly, you can create a simple script that addresses the CTA your prospect responded to.

Example Call Intro:

"Hi this is _____. The reason I am calling is because I had you scheduled for an appointment to talk about your retirement." *(Warm-up and build a little rapport. When the lead information is given, there will be several checkboxes that they check. The next portion of the call is when you bring up the "needs" that the client has which caused them to go through our funnel)* "It looks like you had some questions regarding _____. How can I help you today?"

Address the Call to Action: Remember the CTAs in your funnel. Be sure to touch on what made them convert!

Fact-Find: Walk through your fact-finder and set your second appointment on that call.

7: EXPECTATIONS/RESULTS

After thousands of appointments were generated, here are the averages we see:

- **93%** show rate
- **50%** will take a second meeting
- **15% to 35%** close rate - depends on products offered and sales ability
- **40 appointments** are roughly equal to **8 clients**, **\$625 target CPA**

\$25,000
Annual Contribution

Don't just take our word for it, here's a look into a client's CRM

The screenshot shows a CRM form with the following fields: "Your Age *" (37), "Gender *" (Female), "Health *" (Excellent Health), and "Annual Contribution Amount *" (\$ 25,000). A "Calculate Again" button is visible to the right. Below the contribution amount, there is a note: "\$21,350 minimum contribution (includes trust fees)". A callout box from the text above points to the \$25,000 value.

8: TIPS TO INCREASE CLOSE RATE OF VIRTUAL STRATEGIES

- ✓ The consultative approach is paramount
- ✓ Don't walk away from a small client
- ✓ Set/confirm the second meeting on your initial meeting
- ✓ Record your meetings
- ✓ Do NOT deviate from the script

WHY IT'S IMPORTANT TO LEAN INTO THIS DIGITAL/VIRTUAL PROCESS

The main strategies in this space are seminars, TV, or working expensive leads.

These are not bad options, but consistency is impossible, cost prohibitive, and very difficult to scale.

If you set this up properly, you can create a marketing engine that allows an agent to step into 12 appointments per week and control the **ACTIVITY** that leads to scalable growth.

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