SECURE AGENT MARKETING

PRE-BOOKED APPOINTMENTS

LEVELING UP YOUR INSURANCE BUSINESS WITH PRE-BOOKED APPOINTMENTS

• If you're serious about scaling your business and crushing it in the insurance industry, you need to be paying attention to Pre-booked appointments!

BUT WHY ARE PRE-BOOKED APPOINTMENTS THE GOLD STANDARD OF LEAD STRATEGIES RIGHT NOW?

- Pre-booked appointments require NO COLD CALLING
- Pre-booked appointments are SCALABLE to your current business needs
- Pre-booked appointments are 100% VIRTUAL
- Pre-booked appointments are scheduled at a time that works for you AND the lead
- Pre-booked appointments allow your day to be STRUCTURED and all you have to do is SHOW UP

HOW DO APPOINTMENTS COMPARE WITH OTHER LEAD TYPES?

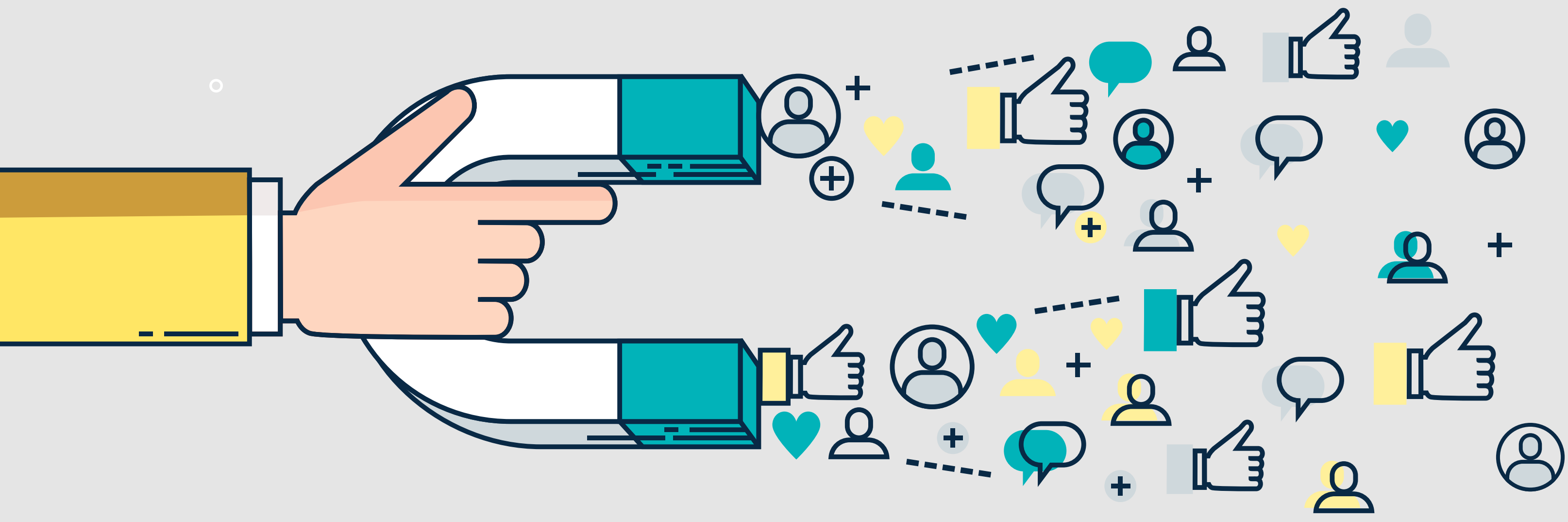
Let's compare leads from a social campaign

LEAD TYPE	SOCIAL	APPOINTMENT
Total Budget	$2400	$2400
Leads Delivered	120	40
Contact %	25%	100%
People Reached	30	40
Cost Per Conversation	$80	$60
Percent Qualified	50%	100%
Qualified Conversations	15	40
Cost Per Qualified Call	$160	$60

HOW IS THIS POSSIBLE?

For Medicare, FE, and P&C, our opportunities are coming from, what we call, digital opt-in leads that are called by a Virtual Assistant (VA) to verify the lead and set the appointment on your calendar through Calendly.

For Retirement, our specialized targeting towards State employees is so optimized, that the leads themselves will book the time on your calendar!



WHERE IS THIS OPPORTUNITY COMING FROM?

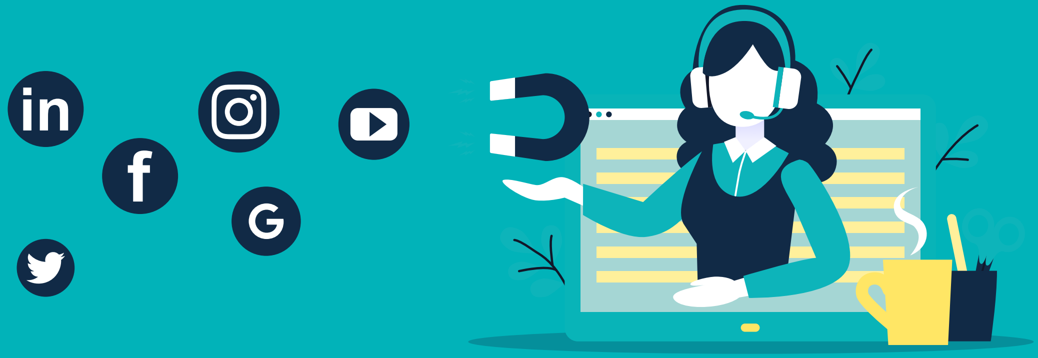
- Digital opt-in leads, called by a Virtual Assistant to verify the lead and set the appointment through Calendly

How Do I Receive the Opportunities?

- Appointment - Secure Agent Marketing's team will onboard you or a member of your team with calendly and use that as our calendar coordination system.

Nurturing the lead

- Once the call/appointment is in your hands, there are no follow-up integrations, or automations included



HOW TO WORK PRE-BOOKED APPOINTMENTS

We've generated thousands of appointments and have developed a sound strategy for working them. Here's all you need to do:

FOLLOW THE SCRIPT!

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?"

Fact-Find: Walk through your fact-finder

WHAT HAPPENS IF THE LEAD DOESN'T ANSWER THE CALL?

If they do not answer the call, follow these steps EXACTLY. Seriously, do this:

1. **Leave a message:** "Hi, the reason I was calling was because we had an appointment scheduled to talk about your retirement. If you need to reschedule, please use the link in the reminder email to reschedule the appointment. If I don't hear back from you today, I will reach out to you by the end of the week."

2. **Send a text message:** "Hi, I had you scheduled for an appointment to talk about your retirement. Is it still a good time?"

3. **Email** them in case they put in the wrong phone number **WITH THE CALENDAR LINK TO RESCHEDULE.** This will automatically reschedule them according to your calendar's availability.