GFI GLOBAL FINANCIAL IMPACT

INTRODUCTION TO GFI LEAD DIVISON

Module 1

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WHAT ARE LEADS?

A lead is a **potential customer** who has shown interest in a product or service. In the insurance industry, leads are individuals who have expressed interest in obtaining coverage, typically by filling out a form, requesting a quote, or engaging with an advertisement.

In the simplest terms, a lead is a person or business that has expressed some level of interest in a product or service you offer. Leads are the **lifeblood of any sales-driven business**, as they represent **opportunities** to convert interest into sales.

WHY USE THEM?

A large part of the industry **only** sells business using lead generation methods. It is estimated that over $1,000,000 in annual premium is sold each day through digital lead generation strategies.

HOW CAN LEADS BENEFIT YOUR BUSINESS?

As a GFI agent, you may already excel in selling to your warm market and leveraging referrals. These strategies are powerful, but incorporating leads into your business can complement your existing approach and **unlock new growth opportunities.** Here are 5 ways that leads can benefit your business.

HOW CAN LEADS BENEFIT YOUR BUSINESS?

1. Expand your reach
2.
3.
4.
5.

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EXPAND YOUR REACH BEYOND YOUR WARM MARKET

While referrals and warm-market connections are valuable, there are ways you can drive explosive growth within your business.

Leads allow you to:

- **Access a Larger Pool of Prospects:** Leads are sourced from individuals actively looking for the services you offer, meaning they're already interested in insurance solutions.
- **Break Out of Saturation:** Over time, your warm market may become saturated. Leads provide fresh opportunities to expand your client base beyond friends, family, and referrals.

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HOW CAN LEADS BENEFIT YOUR BUSINESS?

1. Expand your reach
2. Target qualified prospects
3.
4.
5.

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TARGET PRE-QUALIFIED PROSPECTS WHO...

- Have specific needs that align with your offerings.
- Are actively shopping for solutions or open to hearing about them.
- Can often be segmented by criteria like age, income, or insurance needs, allowing you to focus on prospects who match your ideal customer profile.

SPECIFIC NEEDS

ACTIVELY SHOPPING

SPECIFIC CUSTOMER PROFILE

HOW CAN LEADS BENEFIT YOUR BUSINESS?

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3. Build a consistent sales pipeline
4.
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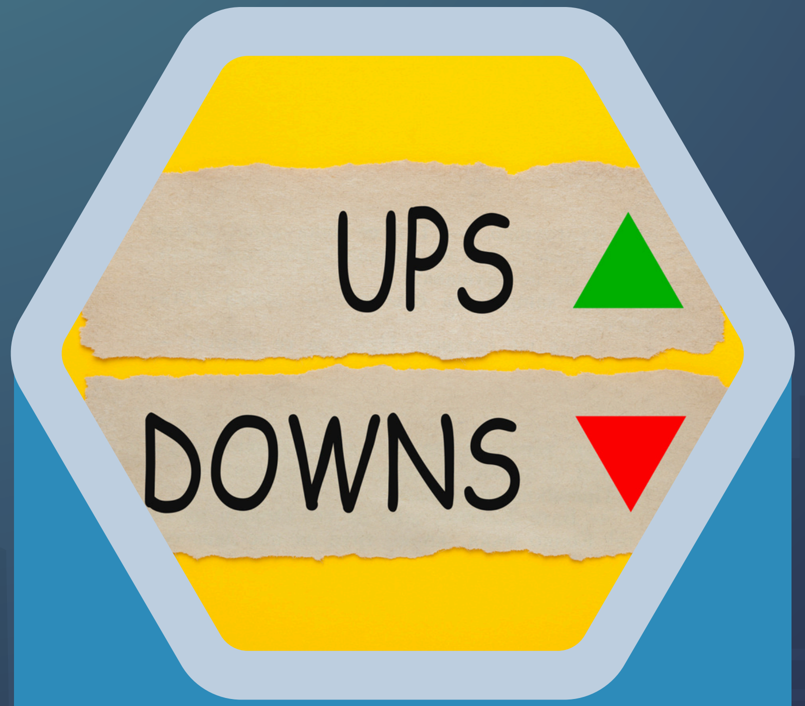
BUILD A CONSISTENT SALES PIPELINE



Relying solely on referrals results in fluctuating business activity.

Leads bring a steady flow of new prospects to fill the white space in your schedule.

Having a predictable source of new prospects helps you maintain momentum during slow referral periods.

Your business becomes more scalable, allowing you to build on your current client base.

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HOW CAN LEADS BENEFIT YOUR BUSINESS?

1. Expand your reach
2. Target qualified prospects
3. Build a consistent sales pipeline
4. Shorten the sales cycle
5.

SHORTEN THE SALES CYCLE

Because many leads are "warm" (interested but undecided), they often require less time and effort to move from prospect to customer. These individuals are already familiar with the idea of insurance and are looking for the right agent or policy, which means:

1. Fewer Objections
2. Faster decision-making
3. More focus on relationship-building
4. Opportunity to upsell

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HOW CAN LEADS BENEFIT YOUR BUSINESS?

1. Expand your reach
2. Target qualified prospects
3. Build a consistent sales pipeline
4. Shorten the sales cycle
5. Increase your earning potential

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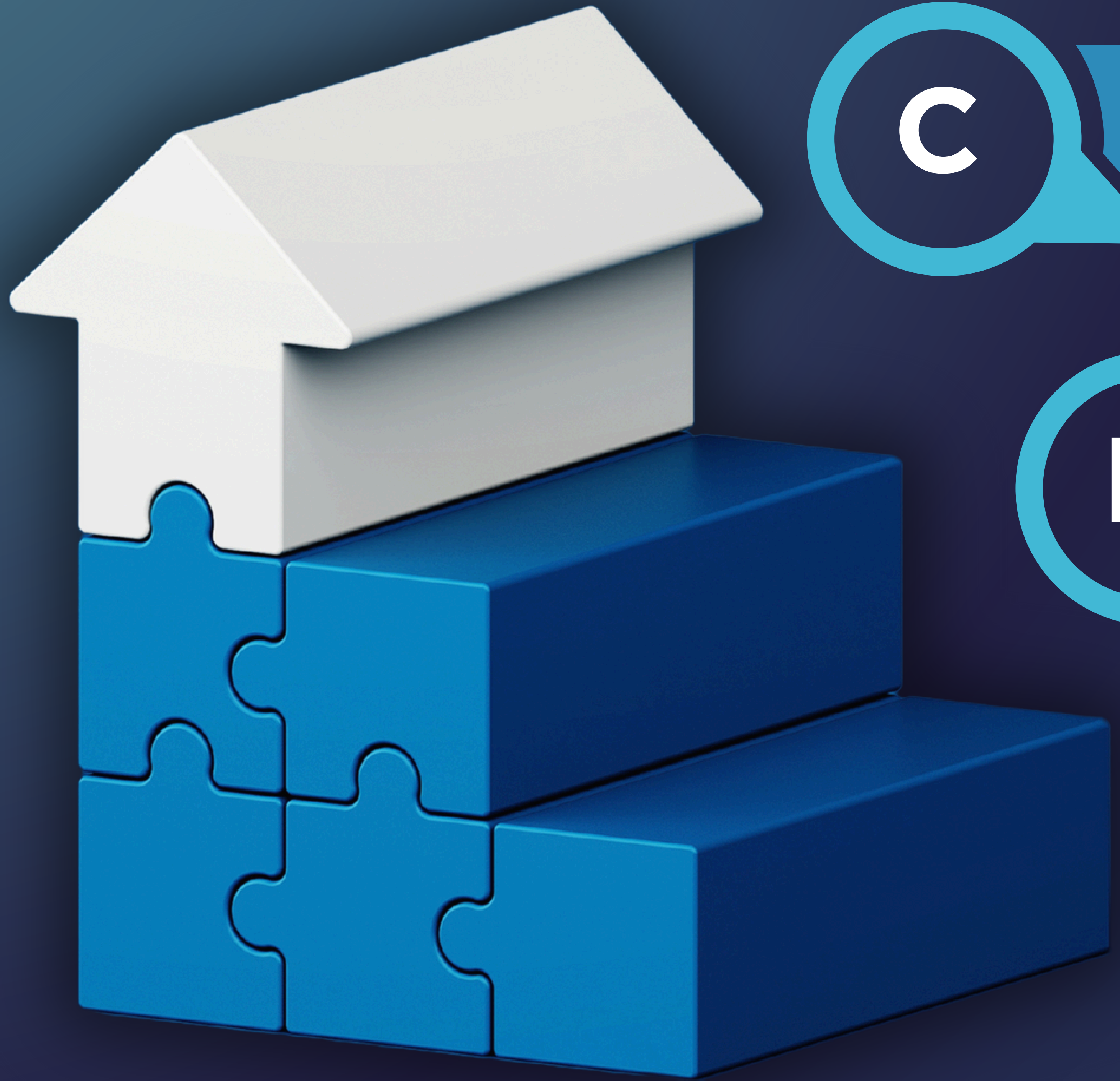
INCREASE YOUR EARNING POTENTIAL



C — BUILD A STRONGER REPUTATION

B — CREATE LONG-TERM RELATIONSHIPS

A — EARN MORE COMMISSIONS

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10 ESSENTIAL MINDSET STRATEGIES

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EMBRACE REJECTION AS A LEARNING TOOL

CULTIVATE MENTAL TOUGHNESS

KNOW YOUR NUMBERS

TRACK YOUR PERFORMANCE REGULARLY

SET CLEAR GOALS

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10 ESSENTIAL MINDSET STRATEGIES

CELEBRATE SMALL WINS

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10 ESSENTIAL MINDSET STRATEGIES

- FOCUS ON VALUE CREATION
- CELEBRATE SMALL WINS
- MAINTAIN A GROWTH MINDSET
- EMBRACE REJECTION AS A LEARNING TOOL
- CULTIVATE MENTAL TOUGHNESS
- KNOW YOUR NUMBERS
- TRACK YOUR PERFORMANCE REGULARLY
- SET CLEAR GOALS

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10 ESSENTIAL MINDSET STRATEGIES

STAY ADAPTABLE

FOCUS ON VALUE CREATION

CELEBRATE SMALL WINS

MAINTAIN A GROWTH MINDSET

EMBRACE REJECTION AS A LEARNING TOOL

CULTIVATE MENTAL TOUGHNESS

KNOW YOUR NUMBERS

TRACK YOUR PERFORMANCE REGULARLY

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10 ESSENTIAL MINDSET STRATEGIES

- BUILD A STRONG FOLLOW-UP ROUTINE
- STAY ADAPTABLE
- FOCUS ON VALUE CREATION
- CELEBRATE SMALL WINS
- MAINTAIN A GROWTH MINDSET
- EMBRACE REJECTION AS A LEARNING TOOL
- CULTIVATE MENTAL TOUGHNESS
- KNOW YOUR NUMBERS
- TRACK YOUR PERFORMANCE REGULARLY
- SET CLEAR GOALS

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SALES STATISTICS

According to the National Sales Executive Association

48% of sales people never follow up with a prospect
25% of sales people make a second contact and stop
12% of sales people only make three contacts and stop
Only 10% of sales people make more than three contacts
2% of sales are made on the first contact
3% of sales are made on the second contact
5% of sales are made on the third contact
10% of sales are made on the fourth contact
80% of sales are made on the fifth to twelfth contact

WHAT TO EXPECT

Define Call Objectives

Establish clear goals for each call, aiming for a one-call close when feasible.

Reinvest in Your Business

A continuous ordering of leads is needed to maintain momentum

Expected Close Rate

8 out of 100 leads = 8%

Multiple contact attempts

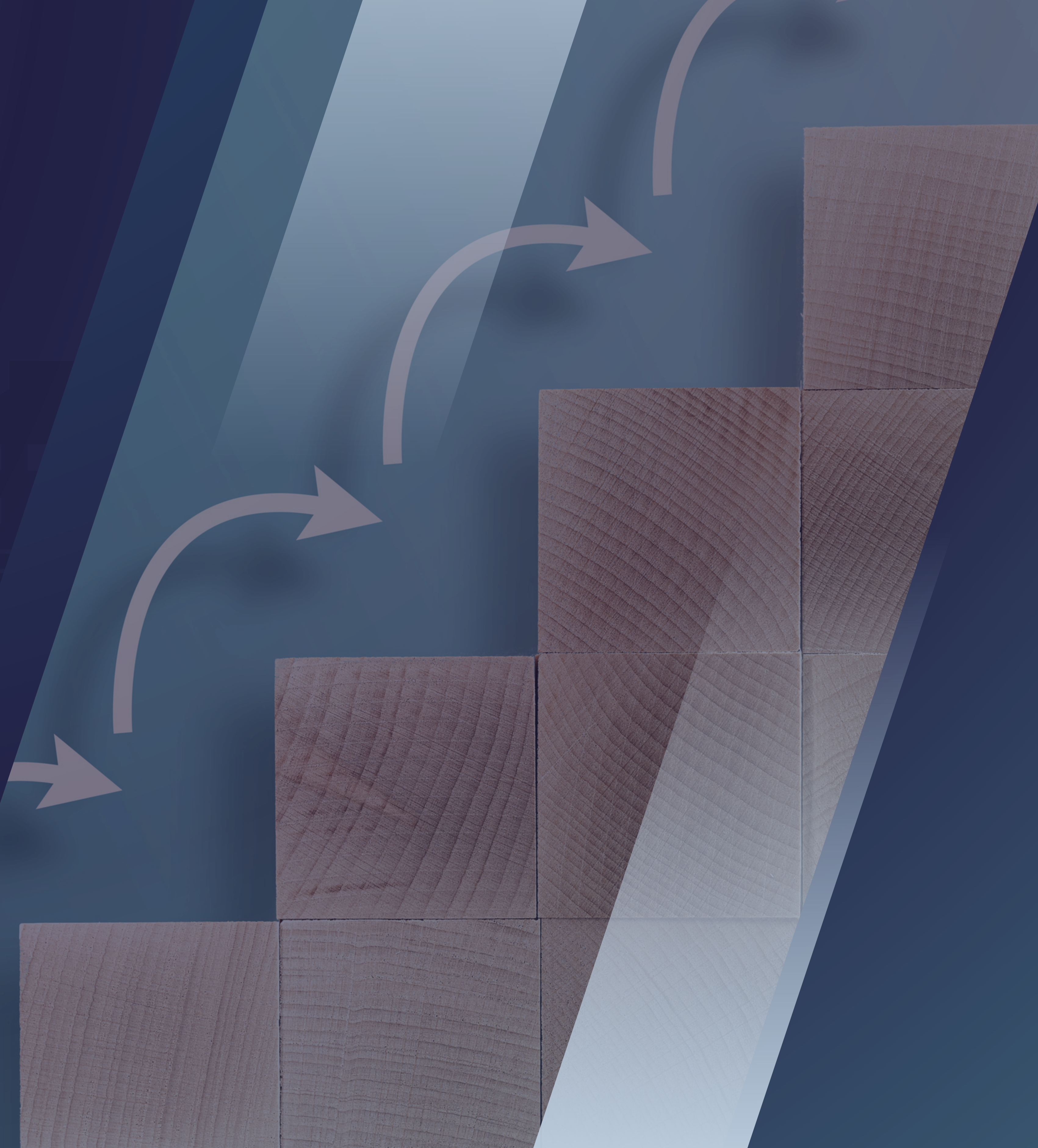
Expect to make 7–12 contacts per lead.

Persistence is Key

Anticipate a high volume of unanswered calls and remain persistent.

Schedule Adequate Time

Allocate 1.5 to 3 hours for lead calling sessions.



WHAT TO EXPECT

Build Rapport Quickly

Engage prospects immediately to establish a positive connection.

Client Qualification

Assess each client's needs to determine the most suitable policy and provider.

Efficient Calculations

Perform pricing and coverage calculations swiftly.

Handle Objections

Address and overcome objections with confidence.

Demonstrate Value

Clearly communicate how our solutions benefit the client's family.

Differentiate Offerings

Emphasize unique features such as free will and living benefits

START-UP CHECKLIST

- **CRM System**: Set up a CRM with integrated calling, texting, and email features.
- **Carrier Appointments**: Obtain appointments with at least four Final Expense (FEX) insurance companies.
- **State Licenses**: Be licensed in at least 5 states to open up more opportunities
- **Script Proficiency**: Master sales scripts for engaging with your specific leads (Aged, Gold or FEX)
- **Client Matching**: Develop the ability to identify and recommend the best insurance companies for each client's unique needs.
- **Investment in Tools**: Ensure you have a proper set up to handle work flow

START-UP CHECKLIST

- **Lead Generation Knowledge:** Understand various lead generation strategies, including referrals, online marketing, and purchasing lead lists.
- **Data Management Skills:** Be proficient in entering and managing data to keep client information organized and up-to-date.
- **Analytical Abilities:** Learn to analyze lead metrics to assess the effectiveness of different strategies and make informed decisions.
- **Communication Skills:** Continually work on strong interpersonal skills to build rapport and trust with clients.
- **Compliance Awareness:** Stay informed about industry regulations to ensure all practices meet compliance standards.

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CRM REQUIREMENTS

1. **Auto Dialer Integration:** Seamlessly integrate with an auto dialer to streamline outbound calling.
2. **Lead Management:** Maintain a centralized database for tracking and segmenting leads.
3. **Call Logging & History:** Automatically record call details and interactions for future reference.
4. **Follow-Up Scheduling:** Set automated reminders and tasks to ensure timely follow-ups.
5. **Sales Pipeline Tracking**: Visualize and manage the progress of leads through various stages.
6. **Analytics & Reporting:** Generate performance reports to monitor call outcomes and conversion rates.
7. **Notes & Interaction History**: Easily add and review detailed notes for each lead to maintain context.
8. **Email & Calendar Integration:** Sync with your email and calendar for efficient appointment scheduling and communication.

RECOMMENDED TOOLS

1. **CRM Software**: Use a robust system (e.g., HubSpot, Salesforce, Zoho CRM) to track, segment, and manage your leads.
2. **Auto-Dialer Integration**: Choose an auto-dialer (like PhoneBurner or Mojo Dialer) that integrates with your CRM to streamline outbound calling.
3. **Reliable Computer**: A desktop or laptop with sufficient processing power and multiple USB ports to support various peripherals.
4. **Headset & Microphone:** Invest in a quality wired headset (such as the Logitech H540 or Jabra Evolve 40) for clear communication during calls.
5. **Dual Monitor Setup:** Extra displays allow you to view your CRM, auto-dialer, and additional resources simultaneously, enhancing multitasking and productivity.
6. **Ergonomic Accessories:** Consider an ergonomic keyboard, mouse, and adjustable chair to maintain comfort and efficiency during long call sessions.
7. **High-Speed Internet Connection**: Ensure a fast, stable internet connection to support VoIP calls, CRM access, and other cloud-based tools.
8. **Productivity & Scheduling Tools:** Integrate calendar and email tools (e.g., Outlook, Google Workspace) for streamlined scheduling and follow-up management.
9. **Call Recording & Analytics Software:** Use tools that record and analyze calls to refine your techniques and ensure quality control.

IMMEDIATE NEXT STEPS

- Complete Leads Division Playbook
- Import to your tracking system
- Complete Leads start-up checklist with trainer/EMD
- Send first communications & Begin calling
- Purchase Leads
- Begin Work Flow
- Plan your schedule; Prioritize leads
- Work with your Trainer/EMD on performance (8%+ Goal)

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GO FOR IT!