



Successful Direct Marketing Techniques

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TARGETLEADS
A Division of Senior Direct, Inc.



How to make Direct Mail work

- Market for a multitude of products.
- Vary your demographics and zip codes
- Utilize effective contact management
- Track your response and sales



Marketing Multiple Products

- Mail pieces that offer the consumer multiple offerings generate a higher response rate, by as much as 300%
- These pieces create a better environment for multiple sales



Marketing Multiple Products, cont.

- Fabulous door openers
- Everyone is looking for more people to talk to, more people to present to, these work.
- If you cannot sell Final Expense, the opportunity for Annuities, Life, Med Supp and more are possible
- Generate a greater referral base



Marketing Exclusively for LTC

- Use Tax Advantage language
- Partnership States will bring new appeal
- Offer to establish if a consumer can Health Qualify
- Affinity Marketing
- Duplicate Lists



Advantages of purchasing the Duplicate List

- Dupe Lists will provide the name, address and phone number of your entire mailing.
- You can easily find the neighbors of the respondents, when you are in a neighborhood, you have all the demographically qualified residents.



Advantages of purchasing the Duplicate List, cont.

- Many clients tell us that they sell as many policies from the dupe list as they do from the respondents.
- Because they received a mailer, a follow-up call to the non-responders is not cold, but a warm call.
- A very inexpensive way to generate more prospects.
- Phone numbers are DNC Scrubbed.



Varying Demographics

- If you are constantly mailing to the same zip codes with the same parameters, you may be missing opportunities.
- A zip code that requires greater driving may not be mailed as frequently and more likely to respond.



Varying Demographics, cont.

- If you are constantly mailing to a specific Income Range, dropping the income slightly may also increase response.
- You will reach new prospects.
- Income selections are estimates and may not reflect a consumers true spending abilities.



Client and Prospect Management

- If you are still using a paper filing system, you are missing opportunities.
- Leads are precious and must be treated like gold.
- Effective Contact Management is imperative to maximize the potential of your leads.



Client and Prospect Management

- Caller-Id makes it harder to reach consumers.
- Consistently calling at the same time of day is not always effective.
- Timely follow-up is critical.
- Marketing cross-sell opportunities is very hard without database help.
- Allows for ease of tracking mail and selling success or failure

TL LeadManager, our system

Welcome to TL LeadManager
You are logged in as: Nancy Baker
Today's date is: 2/22/2008
The current time is: 2:18:20 PM

Search

Lead Appts

All Appts

Lead Tasks

All Tasks

Calendar

Letters

<<>>

2 of 307

New Lead

View All Leads

Go to:

Lead Detail

Correspondence Log

Lead Card

Help/FAQ

E-Mail Comments To TLLM

Log Out

Appts Today: 2

Urgent Tasks: 1

People To Call: 72

People To Mail: 39

Appts Tomorrow: 2

Non-Urgent Tasks: 31

People To Call Today: 11

New Leads: 5

	First Name	Middle Name	Last Name	Suff	Ht	Wt	Dob	Age	SSN
Salutation	Michael	J	Haber			0	10/21/1948	59	
Spouse	Sandra	M	Haber			0	5/14/1950	57	
Company									
Home Phone	(555) 444-4444 ...								
Work Phone	...								
Cell Phone	(555) 444-8585 ...								
Fax	...								
Address	24670 Main St ...								
Map It									
City	Dallas								
State	CA	Zip	75234	County					
E-Mail	Michael@MSN.com ...								

Lead Status
☐ New Lead (Not Contacted)
☐ Call Back
☐ Not Interested
☐ Cannot Contact
☐ Did Not Qualify (Financial)
☐ Did Not Qualify (Health)
☐ Mailed Info
☐ E-Mailed Info
☒ Appointment Set For:
2/8/2008 at 03:30 PM
Appt. Info.
At my office, very interested. Co-worker, Anna Smith, will also be there.
☐ Presentation Made
☐ Application Submitted
☐ Application Submitted & Policy Information Entered
☐ Application Rejected
☐ Sold/Placed
☐ Marked For Deletion:

Financial Info

Comm. Tracking

Mail Jobs

To-do for this Lead
☒ Must Call on: 2/8/2008 at 10:00 AM
Description:
Call to confirm Appointment
☐ Must Mail on:
Description:
General Notes
Very interested, Aunt Betty currently in LTC situation
Call Notes
Enter new Call Notes in the space below then Click This Button to save them.
Thu Feb 21 2008 12:40PM Save Del
They are looking forward to our appointment.
Tue Jan 8 2008 8:54AM Save Del
lvm

Essential Direct Mail Reporting

Batch	Batch Cost	# of Mailers	Date Mailed	# of Responses	Response Rate	Cost Per Lead	# of Policies Sold	\$ Total of Policies
Job 1	\$6,500.00	12,000	12/01/2008	157	1.31%	\$41.40	17	\$43,684.44
Job 2	\$1,000.00	2,000	12/07/2008	50	2.50%	\$20.00	22	\$58,748.00
Job 3	\$1,000.00	3,000	12/14/2008	38	1.27%	\$26.32	5	\$3,080.00
Job 4	\$1,000.00	2,000	12/21/2008	47	2.35%	\$21.28	13	\$23,922.00
Job 5	\$10,000.00	15,000	12/28/2008	277	1.85%	\$36.10	18	\$31,563.00
Job 6	\$1,000.00	2,000	01/05/2009	50	2.50%	\$20.00	1	\$2,244.00
Job 7	\$1,500.00	3,500	01/12/2009	45	1.29%	\$33.33	1	\$2,400.00
Job 8	\$750.00	1,500	01/19/2009	29	1.93%	\$25.86	9	\$16,980.00
Totals	\$22,750.00	41,000		693	1.69%	\$32.83	86	\$182,621.44

You must know what's pulling and what's converting. A high response rate isn't always the best lead piece.