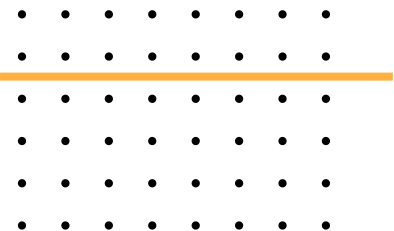
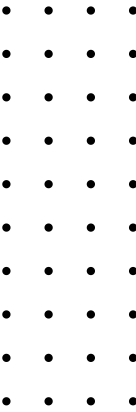




BENEPATH, INC.

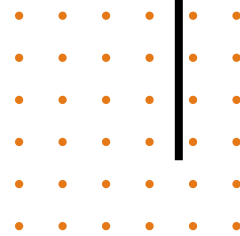
July 2024

6-Week Outreach Plan For Benepath Leads

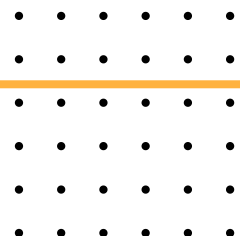


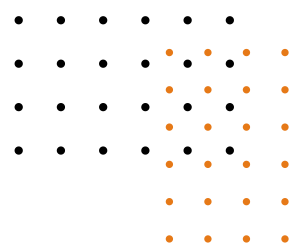
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INTRODUCTION

Maximizing conversions with exclusive leads requires a careful balance of strategic communication and respect for the lead's time and preferences.

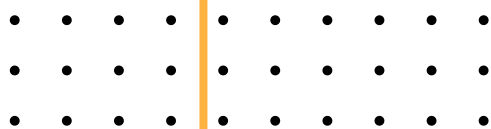
This 6-week plan is designed to engage leads effectively, using a combination of calls, emails, and texts, while always considering the best interest of the potential customer.

WEEK 1: ESTABLISHING CONTACT

Day 1: Call immediately upon receipt of the lead. If contact isn't made, send a follow-up email with a brief introduction and value proposition.

Day 2-5: Continue with one call per day at varying times. After each call attempt, send a follow-up email that includes helpful information or resources relevant to their indicated interests.

Day 7: End the week with a call and an email summarizing the week's touchpoints and the next steps.



WEEK 2: BUILDING ENGAGEMENT

Early in the Week: Make calls in the early evening and follow up with emails offering additional insights or a brief client testimonial.

Midweek: Send a text message if permitted, reiterating your availability to discuss their needs.

End of Week: Conclude with a call and an email that introduces a new aspect of your service that could specifically benefit them.

WEEK 3: DEEPENING THE RELATIONSHIP

Start of Week: Start with a morning call and follow up with an informative email related to common insurance concerns or questions.

Midweek: Send a midweek reminder via text about any pending offers or documents.

End of Week: Make a call to discuss any thoughts they might have and send an email with a small case study or success story.

WEEK 4: REINFORCING VALUE

Start of Week: Call to discuss potential barriers they perceive and follow up with an email that addresses these barriers with solutions.

Midweek: Send an educational email about the benefits of timely insurance decision-making.

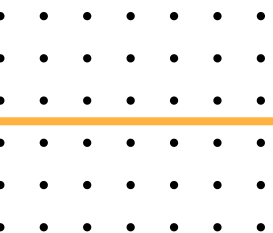
End of Week: End the week with a call summarizing the month's discussions and an email that outlines the next steps or final offer.

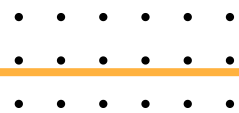
WEEK 5: CLOSING STRATEGIES

Start of Week: Start with a call focusing on finalizing the decision and an email recap.

Midweek: Send a gentle reminder text about the ending offer.

End of Week: Make a final call attempt for the month, followed by an email thanking them for considering your services and leaving the door open for future contact.





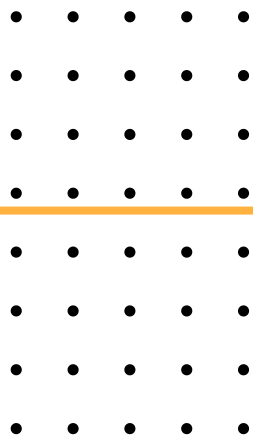
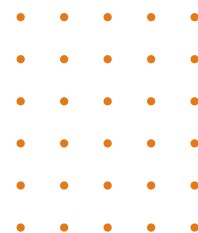
WEEK 6: LAST EFFORT AND SETTING STAGE FOR LONG-TERM TOUCH

Early in the Week: Call with a focus on any last-minute objections and send an email that includes a summary of how you can meet their needs moving forward.

End of Week: Send a final text or email for the month, emphasizing the expiry of the current offer and how to proceed if interested.

POST 6-WEEK STRATEGY: EMAIL DRIP CAMPAIGN

Continuous Engagement: Initiate an email drip campaign that delivers regular, value-driven content. This keeps your name in front of the lead without high-pressure sales tactics, providing them with ongoing resources and reasons to choose you when they're ready.



6 Week Value Driven Email Drip Campaign Timeline

Week 1		Introduction to your services and value proposition
Week 2		Sharing a relevant blog post or article
Week 3		Customer testimonial or case study
Week 4		Educational content or industry insights
Week 5		Highlight a special feature or service
Week 6		Final reminder of your value and call-to-action

CONCLUSION

This 6-week outreach plan is crafted to build a relationship based on trust and value, enhancing the potential for conversion while respecting the consumer's preferences.

Leveraging technology like CRM systems ensures that no follow-up is missed and all communications are timely and relevant. By adhering to this plan, you position yourself as a helpful, knowledgeable agent ready to meet their insurance needs.

RESOURCES FOR FURTHER INFORMATION AND ASSISTANCE

For more information and assistance with navigating your outreach for exclusive leads, please contact us using the information below.



support@benepath.net



(866) 368-0377; press 2 for service



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