



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](#)

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**

[Lead Detail](#)
[Correspondence Log](#)
[Lead Card](#)
[Help/FAQ](#)
[E-Mail Comments To TLLM](#)
[Log Out](#)

2 of 307

[New Lead](#) [View All Leads](#)

Go to:

| | 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 | | | | | | | | |
| City | Dallas | | | | | | | | |
| State | CA | Zip | 75234 | | County | | | | |
| E-Mail | Michael@MSN.com | | | | | | | | |

Important Info

Must Call - 2/8/2008

Appt - 2/8/2008

No Mailings

Lead Category

Assigned Elk Club Member
+

Affinity Group Leads
-

Assigned Date

Bookmarks

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:
 at

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:

To-do for this Lead

Must Call on: at

Description:

Call to confirm Appointment

Must Mail on:

Description:

Very interested, Aunt Betty currently in LTC situation

Call Notes

Enter new Call Notes in the space below then to save them.

Thu Feb 21 2008 12:40PM

They are looking forward to our appointment.

Tue Jan 8 2008 8:54AM

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.