



# Successful Direct Marketing Techniques

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Presented by Richard Bufkin, VP

**TARGETLEADS**  
A Division of Senior Direct, Inc.



# How to make Direct Mail work

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



# Marketing Multiple Products

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- 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.

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- 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

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- 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

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- 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.

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- 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

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- 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.

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- 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

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- 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

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- 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:

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	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	<input type="text"/>								
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:

**General Notes**

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

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
<b>Totals</b>	<b>\$22,750.00</b>	<b>41,000</b>		<b>693</b>	<b>1.69%</b>	<b>\$32.83</b>	<b>86</b>	<b>\$182,621.44</b>

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