

# 6-Week Outreach Plan for Benepath Leads





**BENEPATH**

## 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.

### **1** WEEK 1 **Establish 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.



## 2 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.



## 3 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.



# 4

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.



# 5

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.



# 6

WEEK 6

## Final Push, Long-Term Foundation

**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.

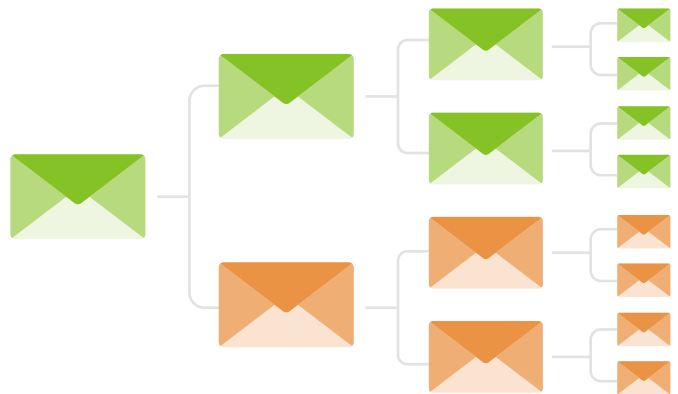
**End of Week:** Send a final text or email for the month, emphasizing the expiry of the current offer and how to proceed if interested.



### POST 6-WEEK STRATEGY:

## Email Drip Campaign

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.

✉ [sales@benepath.net](mailto:sales@benepath.net)

📞 (866) 368-0377; press 2 for service

📘 [@benepathleads](#)

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