Harvesting Prospects from the Animation Drip Campaign

Many of you have put all your prospects in the video animation email drip campaign in iContact, which is a great way to engage them over 10 weeks. However, now that you have disturbed and reiterated your message, it would be beneficial to follow up with the active prospects that are watching those videos. You could wait for someone to respond to the email or call your office but being proactive and calling those warm prospects that are watching them could drive additional meetings or calls with the advisors.

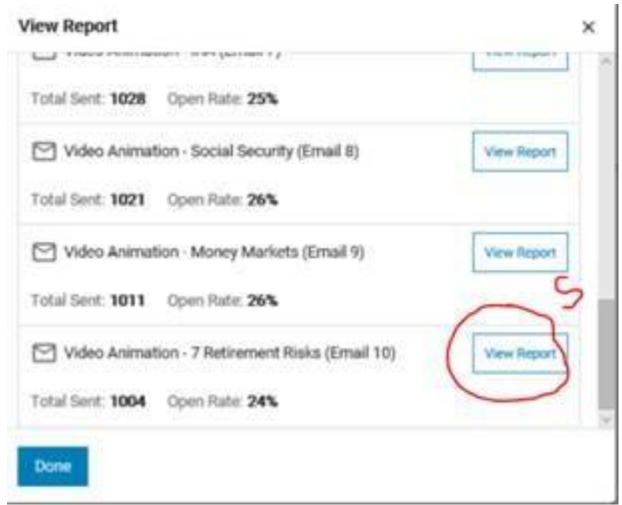
Recommendations:

- Ideally, look at the video drip email reports every 2 or 3 weeks to see which prospects are actively opening and clicking on the videos
- If you have prospects that have already gone through the 10 emails in the campaign, then look at the last email sent to see which prospects opened and clicked on that video
- Check in your CRM system to see the last notes about those prospects
- If they were unqualified or the advisor didn't want to work with them, don't call them
- If the advisor has never met them or they were qualified, call them to reengage and try to schedule an appointment or 30 minute call with the advisor

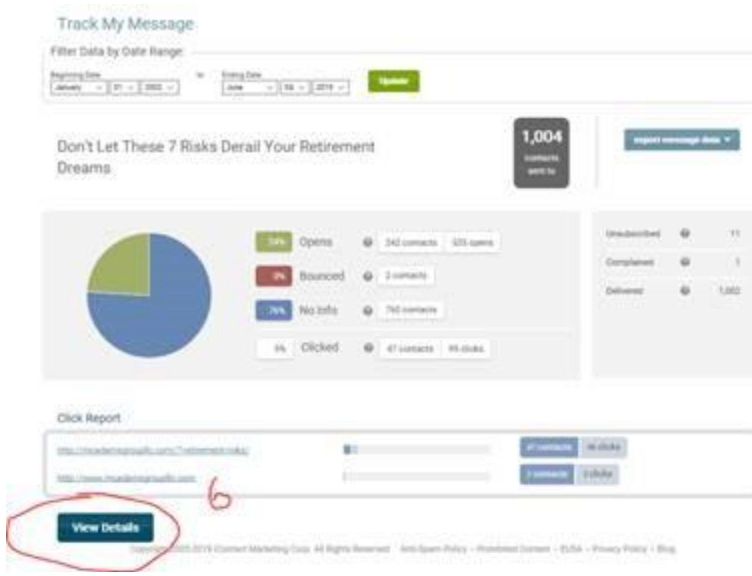
Email Reports in iContact:

1. Click on "Automation"
2. Click on "Active"
3. Click the "…" to the right

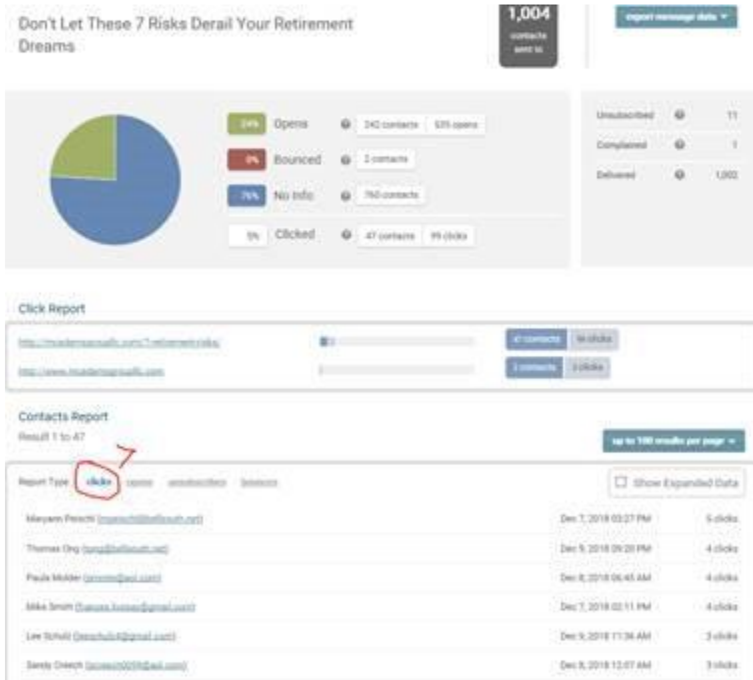
4. Click on "View Report"
5. Scroll down to the last email and click on "View Report"



6. Click on “View Details”



7. Click on “Clicks”



Call Script:

"Good morning, (Prospect Name.) This is (Your Name) calling from (Office Name).

I was just calling to reach out to get your feedback on the video animation e-mails that we had sent out to you over the past few weeks.

Did you think that they were informative and that you got some valuable information from them?

Did you have any questions that popped up after watching any of those video animations?

I would love to go ahead and get you scheduled for a one-hour complimentary consultation with (Advisor's Name) so he can help answer any questions you may have, as well as discuss anything else you may want additional information on.

If you would prefer, we can also go ahead and just schedule you a 30-minute call to speak with (Advisor's Name) and you can ask him any questions that you might possibly have or be curious about."

For more information or to schedule a coaching call with Andrew Thorpy, Director of Coaching, please contact Megan Robert.

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