



Top 7 ways insurance carriers can optimize marketing leads, targets and prospects.

When it comes to lead generation, it's all about quality. But in a sea of online leads, how do you distinguish the good from the bad? This list of suggestions offers worthwhile techniques to help you get the most mileage out of your marketing plans.



Identify. Attract. Retain.

1. Prospect Targeting

Find the right customer using the right tools

Reaching out to the wrong prospect through the wrong sales channel is costly and this is where automated practices, such as prospect profiling, come into play. Utilize the right tools to ensure target prospects are highly aligned with your target profile to drive more sales. The more insight into your prospects, the more opportunity to deliver the right message to the right person at the right moment.

2. Buying Leads with Retention in Mind

Keep those leads coming

“To buy or not to buy” is the question many marketers ask in reference to purchasing leads. If you’re like most insurers that buy leads, you know the balance of quantity and quality can be delicate. To ensure ongoing lead generation, be clear that you are buying a list, not renting, so you can continue marketing touch points without limitations. Make sure they include the right demographic data to reach your ideal customer. In addition, ensure they can identify contacts who have purchased insurance products or services similar to yours.

3. Lead Qualification

Don’t waste your marketing budget on unqualified leads

In a perfect world, your marketing programs generate more qualified leads than you can handle. But in the real world, leads may end up being current customers, duplicates, fraudulent, or outside of your target market. So how do you anticipate which leads are most likely to result in a quote and policy? That golden thread between raw leads and qualified prospects is lead scoring. By qualifying leads early on, through lead scoring, you’ll save time and money. Say goodbye to unproductive leads so you can say hello to increased close rates and sales revenue.

4. Make the Buying Decision Easy

How not to lose your leads to “the other guys”

Many prospects shop multiple carriers and plans before deciding to buy. Make the policy decision less daunting and more intuitive via a tailored shopping experience. Suggest appropriate coverage options generated from real-time prospect attributes for a customized sales engagement that visitors will appreciate and respond to. And keep that response window short. Once the lead form is filled out, time is of the essence to contact that high-quality lead and convert them into a customer.

5. Lead Engagement and Follow-Up

Know what makes them tick

To successfully engage prospects, Know Thy Customer with real-time insights into who they are and what’s likely to get their attention. Is the prospect a motorcycle, boat or RV owner? Seize the opportunity to cross-sell, upsell or just plain sell by investing in a solution that provides a single view into your prospect’s profile and potential needs. Insight into the digital journey that led prospects to you will also help improve targeting, messaging, and identification of those leads that are worth nurturing.

6. Targeted Messaging

If you want more policy sales, personalize the offer

The right marketing automation can do magical things with data insights, such as varying messages, personalizing offers based on prospect interests, and improving engagement at the point of contact—all from obtaining just the prospect’s name, address and date of birth. Personalized experiences develop authentic relationships that result in customer retention and trust. Build customer relationships by creating more personalized user interactions that will help prospects advance through the purchase funnel.

7. Results Tracking

Get the skinny on prospects to know how to close them

When you know which leads turn into customers, it’s a lot easier to identify the best leads to pursue. Tracking the results from your leads can help you improve lead quality and optimize your touch points.



Imagine the marketing power of knowing which leads are more likely to buy and which just want to shop. The opportunity is great, as is the potential for improved ROI on your marketing programs.

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