Level Up Leads

IUL

Level Up Leads are generated from multiple digital platforms. Prospects are educated about life insurance and are expecting to be contacted by a licensed insurance professional.

DEFINITION

Level Up Leads are high-intent digital leads generated from various social media platforms and websites. Our IUL leads are educated about the benefits of a tax free retirement These leads result in the sale of IULs, participating whole life policies, term life policies and annuities. All leads are TCPA compliant.

VALUE PROPOSITION

Level Up generates leads using videos and images. We show agents an example of the video ads that are used to generate leads. Our pricing is not dependent on your contract level.

POINTS & PRICING

Deluxe	Premium
$33/Lead	$33/Lead
5+ Answers	10+ Answers

VALUE-BASED PRICING CONSIDERATIONS

Data-Based projections based on the purchase of 10 leads

Average APV: $1,800

Average Days to App: 7

On average, top agents see as high as a 6x multiple on investment.
To achieve similar success, please refer to Agent Profile below

	Typical Agent	Top Agent (1.7x)
Total Average Submit	$4,284	$7,344
Average Net Placed	$2,579	$4,421
Average Commission (85)	$2,450	$4,200
Multiple Investment on Leads	**3.5x**	**6x**
Avg # Apps Written in Week 2	2.4	4.1

The chart above is based on average close ratios *(including referrals)* for experienced agents who submitted 80% of the total apps on this lead type of the previous six months — Adjusted for the higher proportionate close rates for our top 10% of closers, for this lead type, measured over the prior six months.

CONSUMER PROFILE

- Ages 30+
- Actively researching & shopping for tax-free retirement accounts

AGENT PROFILE

- Coachable
- Tech-Savvy
- Licensed in 5+ states
- Previous telesales experience

TIPS & BEST PRACTICES USING LEVEL UP LEADS

Coaching

Weekly Sales Coaching is available to help agents with a SLO of $250 or more confidently convert their Level Up Leads using proven strategies and support.

Level Up Sales Training

We suggest that you complete the Level Up sales training for the lead type that you purchase.

STOP means CALL...

When a lead replies to the automation "STOP", that is a great time to call the client. We have many sales that are documented when the client initially responded STOP to the automation because they did not want to proceed with any text messaging.

Video Appointments

Appointment show rates are normally 65-85%, if you tie it down properly. Do not attempt to complete a One Call Close on your Mortgage Protection, IUL, DFL/IBC or Annuity leads. You are the Busy Agent, so schedule the appointment and build a connection via Zoom, Google Meet, etc.

Business Card Graphic

We suggest that you send clients your custom agent graphic at the beginning of the appointment. Do not send your graphic while following up with your client, only when they are on the phone.

Check-In Calls

The most successful agents using Level Up Leads join the Level Up Check-In Calls. We urge agents to join because we show sample video ads to our clients.

Insurance Toolkits / Virtual Mentor / Navigator

We suggest that you get a subscription with Insurance Toolkits, Virtual Mentor or Navigator, so that you can underwrite while on the phone with your client.

Text As Sam (Assistant), Call As Yourself (Agent)

We suggest that you text clients as the Assistant Sam. The thought process of this is that it eliminates the clients from asking you questions regarding pricing, etc. This allows the Agent to be portrayed as busy, even though it is you.

Local Presence Dialers

We suggest that you use dialers with Local Presence capability. Local Presence capability allows your outbound phone number to match the area code closest to your client. This will increase your contact rate by 30-40%. Using your cell phone and your CRM phone number is not enough. We suggest using Ninja Dialer, Level Up's Power Dialer or any dialer that has the Local Presence capability.

Digital Sales Metrics

27% of sales leads are never followed up on
25% of agents stop after the second attempt
12% of agents stop after the third attempt
2% of sales are made on the 1st contact attempt
3% of sales are made on the 2nd contact attempt
5% of sales are made on the 3rd contact attempt
10% of sales are made on the 4th contact attempt
80% of sales are made between the 5th and 12th contact attempt

THE GOLD IS IN THE **FOLLOW UP!**

PREPARE FOR A MINIMUM OF **12 CONTACT ATTEMPTS PER LEAD!**

SUCCESS IN THE PIPELINE

	Week 1	Week 2	Week 3	Week 4
# of Leads to Purchase	15 Leads	15 Leads	15 Leads	15 Leads
Working Hours	15-25 hrs	15-25 hrs	15-25 hrs	15-25 hrs
***Top Producer**	1-3 apps	2-3 apps	3-4 apps	4-7 apps
***Average Producer**	0-1 apps	1-2 apps	2-3 apps	3-4 apps