

# Prospecting 101

## A Self Study Course for Success

### Introduction to Prospecting

As we have experienced in our careers, sales essentially boil down to two things: **numbers and time**. These two factors go hand in hand, and while you are racing against the clock to meet your quota, you save time and maximize your numbers by investing in the right processes, activities and new skills.

Right now, you may be wondering “why would I use this method?” Well, it is almost guaranteed that **this is the method your competitors are using**.

#### **And this is why YOU should too!**

Prospecting is the first step in the sales cycle. In the end, the goal you are working to achieve is to move the prospect through the sales funnel until they eventually convert into a revenue-generating customer. **Sometimes, you may hear the words “prospect” and “lead” used interchangeably, but there is a huge difference between the two.**

### The Difference Between a Prospect and a Lead

A lead is a potential customer who has expressed **interest in your company or services through a behavior** (i.e., visiting your website, requesting a quote, following you on social media, etc.).

Leads become prospects if they are qualified, **meaning they align with you target audience**. A prospect may also be classified as a potential customer who has limited or no interaction with your business, but they would not be considered a lead.

Leads and prospects have the same end goal, and it's **your job to nurture these potential customers until they buy!**



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### A Guide to Prospecting

Did you know that 50% of sales ends up being time **wasted on unproductive prospecting?**  
(Source: The B2B Lead)

Agent Pipeline doesn't want your business to fall into that sales statistic. The value of working with Agent Pipeline is the guidance and 30-year industry sales experience we have in creating a **simple framework that applies to all sales processes, but with a twist.**

Individuality is important and we realize that everyone has their own approach, so we have weaved in **personal prospecting tips and tricks from our top insurance agents and agency partners.** Choose and experiment with whatever best suits your personal needs during the sales process.

**Research is a vital part of prospecting.** Ensuring the qualification of prospects will highly



**In this stage, we look at accomplishing a few goals:**

- Prioritize and qualify prospects
- Is this prospect workable?
- What opportunities exist to create rapport, create trust, and establish a personal connection?

After researching, you can focus on the establishment of a highly targeted, relevant list to review. Based on your research, **you should have a profile of your target customer, and every individual on that prospect list should meet that criterion.**

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Prioritizing can save you time and ensure that you are dedicating your best efforts to prospects that are the most likely to become customers. **The process may vary based on agents and agency goals.** However, there should be a few buckets of opportunities based on their likelihood to buy. It's important to focus on one bucket at a time.

### **Use a few touchpoints to classify your prospects:**

- Does this opportunity match the customer persona?
- What is the business challenge that aligns with your product offering?
- Are you able to connect directly with the decision maker?
- Do you have a mutual connection or a mutual interest?
- Is there any opportunity for high interaction via social media or in-person?

Rank accordingly and begin your outreach prep. **How do you start this process?** It's simple. From the research you have conducted, **you will likely know what your prospects are interested in, concerned about and find attractive.**

Whether you're calling or emailing, your outreach should be highly tailored towards your prospect's goals, interests, and/or industries. **On the next page, we will discuss some tips you should always keep in mind when contacting prospects.**

- Keep these general tips in mind when contacting a prospect:
- Personalize your email.
- Stay relevant and timely. Be human – you're not a professional robot.
- Help them, don't sell them.
- Keep it casual!

During the outreach, alternating between voicemail and email is recommended. **Ensure each message is unique and does not carry a "salesy" nature.** This allows the prospects to conduct their research and respond at a time that is convenient for them.



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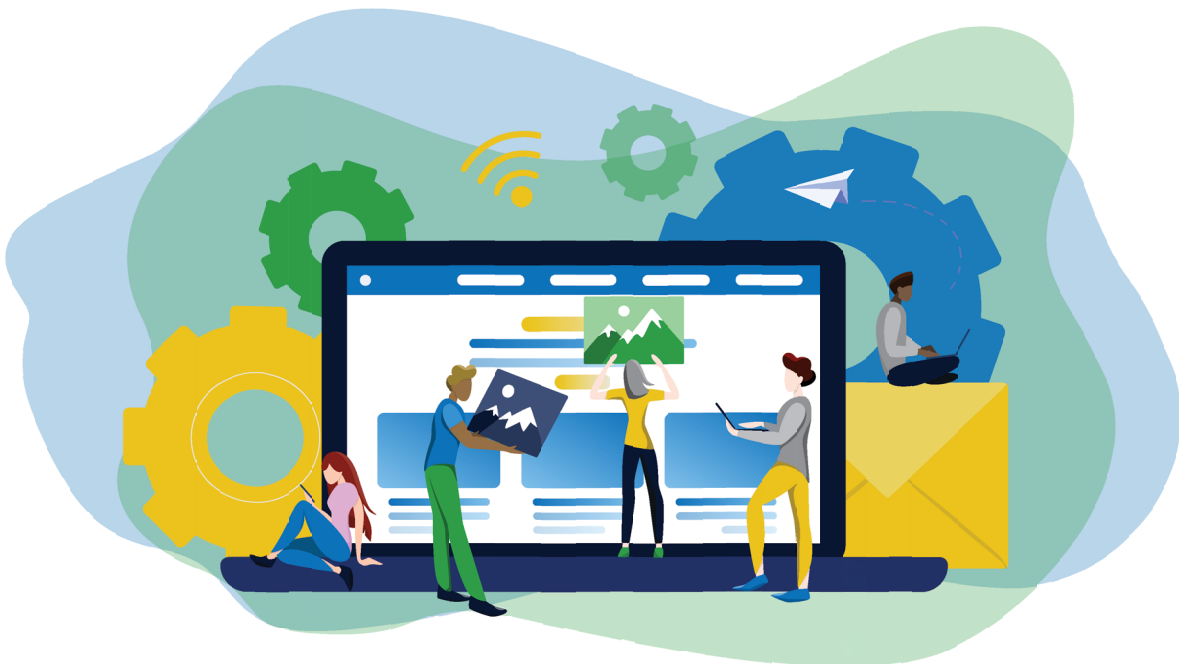


After each call or email, remember to take notes and assess the most important factors. This provides you with the opportunity for a more personalized sales presentation. When you present real solutions to the prospect, it is vital to uncover additional challenges and reiterate what you discussed in the previous conversation. Help your prospect create goals, confirm their budget, explain the decision-making process + their options, and address the consequences of inaction.

Agent Pipeline offers assistance in the sales cycle with in-depth training and reviews on prospecting, sales, and product knowledge. Along with that, we also offer FREE lead programs!

Our lead programs include quality qualified leads from major carriers, discounted lead programs, and free mail drop opportunities.

***For more information, please contact your Regional Sales Director to take advantage of these marketing tools specifically created for your market. Call us at 800-962-4693 today to learn more.***



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