

GENERATE QUALIFIED LEADS and NEW CUSTOMERS

The toughest part of our business is marketing and finding new prospects. MERIT has two powerful proven marketing programs to help you cross-sell your existing clients and make you more money.

Do you have the time to touch base with each of your clients every month?
Either of these programs will help you do that!

HOW IT WORKS



Email Marketing

Email campaign sent
To your client base.

Quote Engine

Clients can get
Quotes on your
Website

Lead Management

You receive an
immediate notification
you receive leads

Analytics

You receive
performance
updates

#1 – Email Marketing Campaign

This product is designed to drive clients to your website with professionally designed, customized emails on timely topics of Life, Disability, Long Term Care Insurance and Annuities.

These emails are designed with your company contact information and logo and *link* to a multi-carrier term quoting system as well as a needs analysis that your client can complete on *your* website.

You will be notified immediately of any clients who access the term engine and you can review a report of people who opened your email. This is a turn-key program and a win-win for you and your clients!

#2 – Term Engine/AppAssist

This program includes a needs analysis, a single-carrier term quoting engine and an on-line application/submission process on *your* website.

You receive a notification when an application is submitted with the specific client information.

This program will require that you notify your clients of the service you are providing for them and direct them to your website.

Both of these programs can be promoted by putting messages on your FaceBook or Linked-In pages and adding tag lines on your office emails, including the link to the term engine.

Call us at **800-477-8546** to discuss which program you want to try.



“Your Brokerage Agency of Choice”