

Top 17 Tactics for Life Paid Counts

- 1 Pivot to life on EVERY auto renewal call
- 2 Run \$125K Instant Answer quote for all auto customers without life
- 3 Work the GIFE final expense list — ages 65-80
- 4 Birthday call campaign — create urgency around age cutoffs
- 5 Call all homeowners who don't have a payment protector
- 6 Work the "Declines & Incompletes" list with GIFE scripts
- 7 Text campaign — send 5 life texts per day using templates
- 8 Auto-Billed Life Play — tie life to auto renewal for MLD
- 9 Review all whole life policies with dividends over \$10,000
- 10 Table Rating COP — offer free re-rate exam for table-rated policies
- 11 Anniversary calls — 30/60/90 day follow-up on declined or not-taken apps
- 12 Life Events review — call customers who recently married, had a baby, or bought a home
- 13 Term conversion window call — alert customers when their window is closing
- 14 Annual Life Audit — schedule reviews for all existing life policyholders
- 15 Instant Answer Added Protection — offer extra coverage to whole life customers
- 16 Auto Liability Pivot — flag \$100K+ liability customers without life protection
- 17 Spanish-speaking market — use bilingual script for auto liability pivot