

Insurance Marketing Flow Chart



Insurance Type	CTA Type	Client Type	Campaign Example	Carriers
Final Expense	VB to Live xfer	50 - 70, \$25k - \$40k, Home Owner, Female, B2C Data filtered scrubbed list	<ol style="list-style-type: none"> 1. Courtesy call regarding your new insurance rates. 2. Records show you may be eligible for up to a \$240 discount off of your current coverage. 3. Press 1 now to lock in your new rate while its available. 	MoO, Foresters, Genworth, TransAmerica
Health Major Med	VB to LP	Industry, Interest Grp	<ol style="list-style-type: none"> 1. Courtesy call from _____ benefits dept that open enrollment will soon be closed. 2. Right now you may qualify for a plan for \$0 per mo in premium with little to no deductible through _____. 3. To lock in your rate while you are still eligible go to 	All Eligible Maj Med Plans
Non-Compliant Health Plans	VB to LP VB to Txt	Industry or Interest Grp of upper mid income	<ol style="list-style-type: none"> 1. Courtesy call from _____ benefits dept that open enrollment will soon be closed. 2. Right now you qualify for a plan with no deductible. 3. To lock in your rate while you are still eligible go to www. "yourcampaign brand name".com 	IHC, Assurant, other CI and ACC carriers
Auto Insurance	VB to LP VB to TxT VB to Live xfer	Any. Most succesful is low income.	<ol style="list-style-type: none"> 1. Courtesy call regarding your new lower auto insurance rate. 2. According to our records you may be eligible for a much lower rate on auto coverage. 3. To take advantage of this rate while it's available, CTA 	Carrier Avb
Life Insurance	VB to TxT VB to VM	Industry or Interest Grp of upper mid income	<ol style="list-style-type: none"> 1. Courtesy call from _____ benefits about your new lower rate on your disability coverage. 2. Right now your eligible for up to \$250k life coverage & \$2k per mo of disability coverage for only \$50 per mo. 3. CTA 	Any Avbl Carrier