

Q4 LIFE INSURANCE FOLLOW-UP TRACKER

Convert Your LIAM Leads into Q4 Commissions



SIMPLIFYING YOUR SALES SUCCESS

Leverage IAD's 7 Pillars of Success
to Grow & Scale Your Business

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THE Q4 LEAD CONVERSION LOG

The simplest way to track activity and status.
Use this table as your master sheet.

#	LEAD NAME/SOURCE	LIAM ACTIVITY (CLICKED/ OPENED/ MESSAGED)	SCORE (H/W/C)	FOLLOW-UP DATE	NEXT ACTION DUE	STATUS (QUOTE/ SALE/DRIP)
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

LEAD SCORING & ACTION SYSTEM

Prioritize your time. Align your outreach to the lead's level of interest.

TIER	DEFINITION [THE AGENT'S ACTION]	Q4 GOAL & ACTION PLAN
Hot (H)	Ready to Quote. Clicked a quote form or asked a direct question.	Action: Send 3 low-cost options immediately. Deadline: 7-Day Quote Deadline.
Warm (W)	Need Education. Opened emails, commented, or messaged you generally.	Action: Send 1 short, real-life story or "low-cost, high-value" message. Deadline: 14-Day Nurture.
Cold (C)	No Response. Still on your September list but no recent activity.	Action: Place into a long-term quarterly or bi-annual drip sequence. Deadline: Long-Term Drip.

SIMPLIFYING YOUR SUCCESS

Personalized Support • Unmatched Resources



ACTION SCRIPTS & WEEKLY PLANNER

Use these words to turn interest into revenue.

A. Follow-Up Message Templates

1. The Initial Follow-Up (Text/Email)

- **Goal:** Bridge awareness to action; keep it low-pressure.
- **Script:** "Hi [Name], you may have seen some of the life insurance content I shared in September. If you're still thinking about it, I'd be happy to walk through your options; no pressure at all. Let's talk."

2. The Referral Outreach Script

- **Goal:** Leverage momentum with satisfied clients while your service is fresh.
- **Script:** "I really enjoyed helping you this past month. If you know anyone else who's starting a family, buying a home, or thinking about life insurance; I'd love to help them too."

DAY OF THE WEEK	MONTH	DATE	TOTAL FOLLOW-UPS MADE	HOT LEADS CONVERTED	NEW REFERRALS GAINED
Wednesday	October				
Wednesday	October				
Wednesday	October				
Wednesday	October				
Wednesday	October				

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