

CHUBB®

Lead Generation

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Where do I start?

The Hook

Value exchange

What are you offering your potential customers to leave their personal information?

Examples:

- Your services
- Obligation free quote
- Competition
- Rewards / discounts
- E-books



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Rules and regulations

Financial Advertising Code

Principle 1: Social responsibility

Financial Advertising must be prepared and placed with a high standard of social responsibility to consumers and society.

Rule 1 (a) Social responsibility

Financial Advertising must be easily understood by consumers.

Principle 2: Truthful presentation

Financial Advertising must be truthful, balanced, and must not be misleading.

Rule 2 (b) Truthful presentation

Financial Advertising must not mislead or be likely to mislead, deceive or confuse consumers, abuse their trust or exploit their lack of knowledge.

Misleading may be by implication, inaccuracy, ambiguity, exaggeration, unrealistic claim, omission, false representation or otherwise.

Rule 2 (c) Use of data

Advertisements must not use tests, surveys, research results or quotations from technical and scientific literature in a manner that is misleading or deceptive.

Customer Journey

How are you engaging with your potential customers?

Things to consider

Process to get to your lead form

- The initial touchpoint through to conversion
- Clicks to conversion
- The consistency of your imagery, text, tone
- Bring a sense of familiarity across channels to take your potential customer on the journey and stay in that moment



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Example

Get Your
Freebie
Today

Get the free guide to
level up your biz.

reallygreatsite.com




Get Your Freebie Today

Get the free guide to level up your biz.

Clear description about the offer.

Lorem ipsum dolor sit amet, consectetur
adipiscing elit. Cras blandit ac elit et
sagittis.

Fusce aliquam dignissim mi, ultricies
vestibulum tellus vehicula eget.



Name

Email address

Phone number

I am interested in:

- Personal Insurance
- Business Insurance

I agree to the terms and conditions

Download

Capturing leads

Lead gen forms

Things to consider

- Ensure it is a landing page separate from your home page
- The lead capture information is above 'the fold'
Don't make extra work for your potential customer
- Keep it clear of clutter. You've got their attention so any other information is a distraction and you can lose momentum
- Consistency of messaging and imagery
- Be clear about what the users information will be used for

The image shows a Salesforce CRM landing page. On the left, the Salesforce logo is in a blue cloud. Below it, the text reads "Try the complete CRM solution, free for 30 days." Underneath, a section titled "With Salesforce, you can:" lists three benefits with green checkmarks: "Set up simple lead scoring and routing", "Automate repetitive tasks", and "Get a full view of rep, team, and pipeline performance". Below this is a phone number: "Questions? Talk to an expert: 1-800-667-6389". The background features a scenic mountain landscape with a laptop displaying a CRM dashboard. A cartoon character is in the bottom right corner. On the right side, there is a blue sidebar with the text "Sign up now to start your free trial." and "Please complete all fields." Below this are several input fields: "First name", "Last name", "Job title", "Email", "Phone", "Company", "Employees" (a dropdown menu), and "United States" (a dropdown menu). At the bottom of the sidebar, there is a checkbox for "I agree to the Master Subscription Agreement." and a "Start my free trial" button.

salesforce

Try the complete CRM solution, free for 30 days.

With Salesforce, you can:

- ✓ Set up simple lead scoring and routing
- ✓ Automate repetitive tasks
- ✓ Get a full view of rep, team, and pipeline performance

Questions? Talk to an expert: 1-800-667-6389

Sign up now to start your free trial.

Please complete all fields.

First name

Last name

Job title

Email

Phone

Company

Employees

United States

I agree to the [Master Subscription Agreement](#).

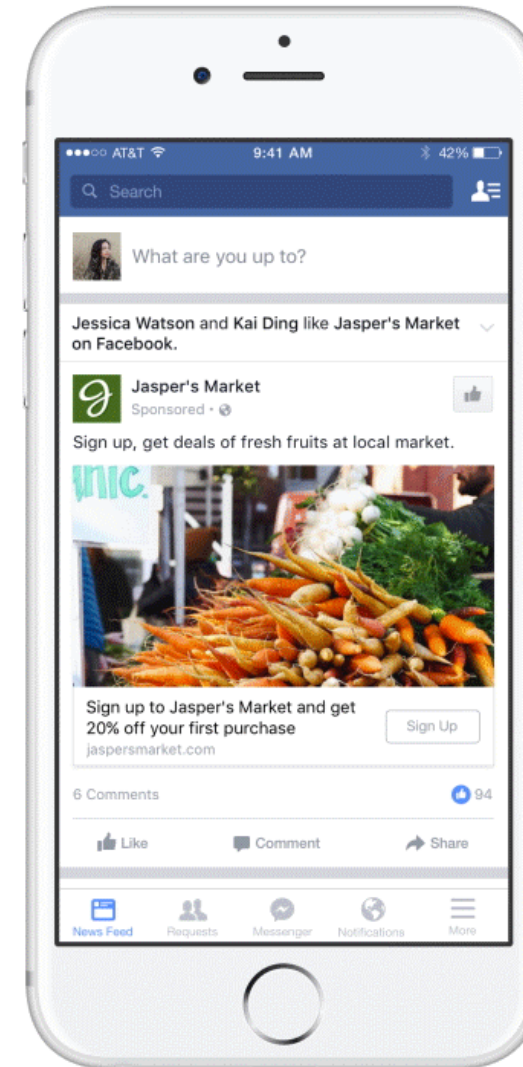
By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).

Start my free trial

Meta lead forms

Lead ads - paid

- Work the same way as other meta ad set up
- Show in potential customers Instagram and Facebook feeds
- Create a lead gen form that can be completed within the Meta platform



Organic vs. paid traffic

Organic refers to visits to a website from unpaid search engine results

- Organic is NOT free
- There are resourcing requirements to manage these 'free' platforms
- Set yourself up for success
- Be realistic about what you can achieve
- Focus your energy on doing one channel right rather than doing a semi-decent job through many.

Paid refers to content that's promoted through paid placements

- Paid is a good investment if you are clear on your objectives so you can measure success
- Make sure you are realistic about how much to invest
- Calculate your expected return on investment
- As per your brand strategy, due your due diligence to make sure the channels you use are reaching your desired audience.

Paid advertising

Google ads

- In the financial / insurance market these ads can have a higher cost but generally better quality visits and conversions
- Ads are set up to directly align with your potential audiences so that you appear at the moment of consideration.

Meta ads

- Good value with creating awareness of your brand / service
- Send good numbers of traffic but lower quality in terms of bounce rate and conversions.



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Quick takeaways

Customer journey audit

- Look at the lead channels that you're using. Is the journey through to your lead capture consistent and easy to follow?
- How many clicks to conversion from each of your web pages? Remember – not all of your traffic will land on your home page
- Think about it from your audience's point of view – the user scenario. Would the experience your providing meet their expectations?



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Round up

- Lead generation is a key element of your brand
- Don't over promise and under deliver
- Think about the customer journey to get to your lead capture form
- Be realistic about what you can achieve with the resources and budget available
- Measure your results to be able to make informed decisions
- Test, learn and enjoy the process.



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Useful links

- Meta Blueprint
<https://www.facebookblueprint.com/student/catalog/list?search=lead+generation>
- Google University
<https://skillshop.withgoogle.com/>
- Adviser Hub
<https://chubblife.co.nz/adviser>
- Financial Advertising Code
<https://www.asa.co.nz/codes/codes/financial-advertising-code/>



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