



Best Practices for Working Insurance Leads

What Sets Top-Producing
Agents Apart?

One of the most common questions we get from agents is:

"What are the top producers doing differently, and how can I replicate their success?"

It's the right question to ask. Building a successful insurance business isn't just about working hard—it's about **working smart** and having the right mindset.

Here's the truth:

There's no magic lead source or foolproof sales script that guarantees success. The best agents can sell in **any market**, under **any conditions**.

So what's the real difference?

After working with thousands of agents over the past 15 years, I've seen one key factor that separates top producers from everyone else:

Their mindset.

The Power of Mindset in Insurance Sales

Your mindset determines how you respond to challenges, how you handle rejection, and how you approach growth.

The best part? **It's completely in your control.**

Developing a winning mindset doesn't cost a thing—it just requires discipline, time, and the willingness to grow.

Here are the three core habits top agents focus on every day:

- ✦ They are **relentlessly consistent** in their efforts.
- ✦ They embrace a **growth mindset** and never stop learning.
- ✦ They genuinely **care about their clients** and put relationships first.

These habits may seem simple, but most agents overlook them—and that's why most agents struggle.

Let's break them down.

1

Top Agents Are Relentlessly Consistent

As an independent agent, you don't have a boss. No one is checking to see if you made your calls, followed up on your leads, or put in the work today.

That's what makes consistency so powerful—it separates those who **treat this like a real business** from those who just go through the motions.

Here's how top agents approach consistency:

- + They set a **structured daily schedule** and stick to it.
- + They don't stop after their first sale of the day—they keep going.
- + They **follow up** with every lead multiple times before moving on.

Many agents fall into the trap of celebrating an early win and taking the rest of the day off. Top producers don't do that. They understand that **leads are most valuable when they're fresh**, so they maximize every opportunity.

What to do:

- + Set clear goals for your day and hold yourself accountable—every single day.
- + Commit to following up with leads at least 5-7 times before giving up.
- + Track your activity. If you're not getting results, look at your consistency first.





2

Top Agents Have a Growth Mindset

There are two types of agents:

Fixed Mindset

- + Believes success is based on talent or luck.
- + Avoids challenges and gives up easily.
- + Thinks they already know everything they need to know.

Growth Mindset

- + Believes effort and learning lead to success.
- + Views challenges as opportunities for improvement.
- + Always seeks out new skills, strategies, and insights.

Top agents are **always improving**—they stay ahead by learning about new products, sharpening their sales techniques, and **adapting to the market**.

What to do:

- + Stay **curious**—read, listen to industry podcasts, and learn from top agents.
- + Keep up with **product changes**—understanding the market makes you more valuable to clients.
- + Invest in **technology and tools**—use CRM systems, automation, and lead tracking to improve efficiency.

Success isn't about being the smartest person in the room. It's about being the **most adaptable**.

3

Top Agents Genuinely Care About Their Clients

At the end of the day, your success in insurance isn't just about **selling policies**—it's about **building trust**.

Your clients aren't just numbers. They're people making **critical financial and healthcare decisions**, and they need someone they can **rely on**.

So what sets top agents apart?

They don't just **sell policies**—they:

- ✓ Educate their clients and help them make informed decisions.
- ✓ Follow up **beyond the sale** to ensure satisfaction.
- ✓ Become a **trusted resource** instead of just another salesperson.

Think about it:

Seniors receive **tons** of mailers, calls, and marketing messages every month from insurance agents. What makes you different?

Your ability to **listen, advise, and build a real relationship**.

When clients feel like you **genuinely care**, they stick with you. They refer friends and family. They **become lifelong clients**.

What to do:

- + Focus on listening—clients don't want to be “sold,” they want guidance.
- + Follow up after the sale to make sure everything is going smoothly.
- + Provide ongoing value—send newsletters, updates, or check-in calls.

The more you focus on helping, the more your business will grow organically.

Final Thoughts: Success Starts With Your Mindset

At its core, success in insurance **isn't complicated**:

- + Work hard.
- + Keep learning.
- + Take care of your clients.

But the difference between **knowing** these things and **doing** them consistently? **That's mindset.**

The wrong mindset:

- ✗ "I already know this—I don't need to improve."
- ✗ "I don't want to bother leads by following up too much."
- ✗ "I'll work harder once I start getting better leads."

The right mindset:

- ✓ "I will master these fundamentals and apply them every day."
- ✓ "Following up multiple times shows my commitment, not desperation."
- ✓ "My success depends on my actions, not on getting the 'perfect' leads."

Your mindset determines your results. Choose wisely

If you commit to **consistency, growth, and building real relationships**, you'll be **unstoppable**.

