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THE FOLLOW-UP STRATEGY FOR BROKERS

BLUEPRINT



THE SALE WAS YOURS... UNTIL YOU DISAPPEARED.

There are very few things in B2B that are actually predictable. One of them is this: most brokers lose the sale not because of what they said—but because they didn't say it again.

Follow-up is the least glamorous part of the business. It's also where 80% of the revenue lives. And most brokers? They're nowhere near it. This blueprint is built from a synthesis of two forces:

- Craig Lack's insights, forged over decades of experience in the trenches—yes, still closing 500+ life groups today—
- And the Prospecting Broker system, engineered through hundreds of failed messages, revised outreach cadences, psychology-backed sales steps, and real-world prospecting labs.

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The result? A no-fluff, emotionally honest, and psychologically strategic framework to turn your "almosts" into closed deals.

Before we dive in, first read what Craig Lack said during an episode of the Heads Up Adviser Show – because it perfectly captures the psychological graveyard where most brokers bury their pipeline:

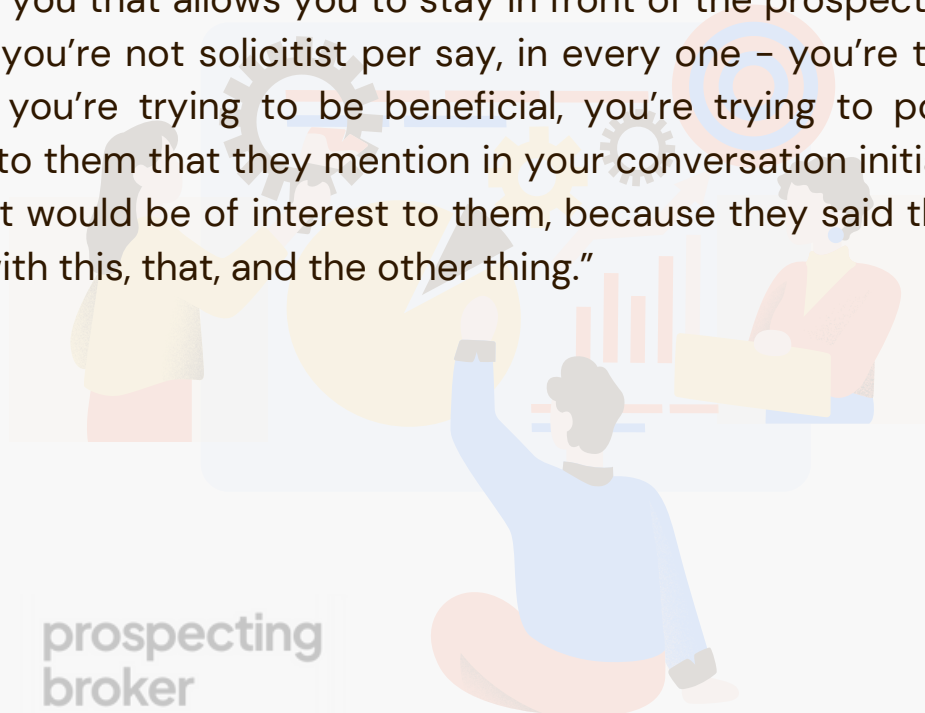
"So here's the challenge. 80% of outbound / outreach to a prospect results in no change. That's across all industries – it's not just healthcare brokers. So the trick is... Hey, we've met a prospect. We weren't able to get them over the hump. We couldn't get them to identify that they had a problem that we could solve. Whatever it was – so they decide to either go in a different direction or – more often than not, as you guys know – they're going to stay the same. Status Quo. So what are you going to do to follow up?"

Well, I can guarantee you that the same business publications that tell you that 80% of pitches end up in no change, will tell you that 80% of sales will happen between the 5th and the 12th follow up.

And guess what your competitors are doing? Well, let's talk about you first. Guess what you're doing? Nothing. Right? You lose, you take it personally, you poud... You don't follow up.

Maybe you follow up once. That would be about 64% of people. Maybe you follow up twice. Now you're less than a half. And then it falls off the cliff, because nobody follows up beyond two times.

And yet, there is a world – or you should have a world of content available to you that allows you to stay in front of the prospect in such a way that you're not solicitist per say, in every one – you're trying to be helpful, you're trying to be beneficial, you're trying to point out something to them that they mention in your conversation initially that you thought would be of interest to them, because they said they had this issue with this, that, and the other thing.”



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INNER MINIMUM: THE PSYCHOLOGICAL CAGE YOUR PROSPECT LIVES IN

Here's the harsh truth: most of your prospects are stuck. Not because they're dumb. Not because they're disinterested. Not because they didn't understand your value. They're stuck because they're trapped in the Inner Minimum – a quiet, invisible psychological cage where everything is just good enough to avoid change.

That's your real competition. Not the incumbent. Not another broker. Not the spreadsheet. It's the status quo inside their own mind.

The Inner Minimum is your prospect's lowest acceptable level of "survival mode." It's not their comfort zone. It's a step *below* comfort – but just close enough to survivable that their brain says, "If it ain't broke, don't fix it."

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In the healthcare brokerage world, it looks like this: a CEO knows premiums are high but assumes, "That's just the market." A CFO is frustrated with claims administration but thinks, "Fixing it would be political suicide." An HR director hates dealing with constant employee complaints but tells herself, "At least it's predictable."

They know it's bad. They just don't know it's dangerous. Not yet. And that tiny gap between discomfort and perceived danger is where all the leverage lives. Until they feel that the cost of inaction is higher than the discomfort of change, they stay still. Not because they're lazy—but because they've trained themselves to survive dysfunction quietly.

That's the Inner Minimum. It's worse than the comfort zone. It's the bare minimum they are willing to accept – until reality forces their hand.

In the healthcare brokerage world, it looks like this: a CEO knows premiums are high but assumes, "That's just the market." A CFO is frustrated with claims administration but thinks, "Fixing it would be political suicide." An HR director hates dealing with constant employee complaints but tells herself, "At least it's predictable."

They don't love the system—they've just accepted it as the lesser evil. They're not waiting for innovation. They're hoping nothing collapses on their watch.

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As you can see, the complicated state of Inner Minimum isn't some rare mindset—it's the default operating system of most market participants. It's not that there aren't deals out there. It's that most of the market lives in psychological standby mode, doing just enough to avoid consequences, but never enough to spark real change.

So the job of a healthcare broker isn't to "find who's ready." That's the amateur's game – hoping to stumble into the 3% of prospects who woke up today with the courage to take action. The real game? It's to interrupt. To disturb the Inner Minimum state and slowly fracture the illusion that "things are fine."

But this process doesn't happen with one brilliant pitch. Or a fancy slide deck. Or your logo. It happens through strategy – intentional pressure, personalized messaging, psychological pacing – **and yes, follow-up.** Because follow-up isn't just "checking in." **It's the delivery system for the most important work you'll ever do: moving someone from quiet survival into decisive leadership.** And if you're not doing that, then let's be honest—you're not selling. You're waiting.

5 REASONS WHY MOST BROKERS DON'T FOLLOW UP

1. REJECTION FEELS LIKE IDENTITY FAILURE

Most brokers stop following up because every ignored message feels like a personal failure. It's not about the deal—it's about the sting. The silence isn't neutral; it's translated as "you're not good enough," and rather than risk that feeling again, brokers retreat. Their nervous system flinches before their logic can argue. Emotion beats strategy every time unless you've trained for it.

2. BROKERS LIVE IN THE INNER MINIMUM TOO

The Inner Minimum isn't just a prospect problem—it's a broker problem. It's the comfortable state where you convince yourself, "They'll reach out when they're ready" or "I'll find a better lead." It's disguised as logic, but it's really avoidance. You don't follow up because you're protecting your ego from discomfort, not because the deal is truly dead.

3. NO PROCESS = NO FOLLOW-UP

Brokers improvise their outreach until they run out of words—and when that happens, the deal stalls. No framework, no emotional arc, no new angles to offer... just an awkward "checking in" email followed by silence. Not because they stopped caring—but because they didn't know what to say next.

4. THEY THINK EMAIL COUNTS AS FOLLOW-UP

Let's be honest—most brokers don't want to pick up the phone. They're hoping a neatly written follow-up email will do the heavy lifting so they don't have to deal with real human resistance. But that's not follow-up. That's wishful thinking with a subject line. When the prospect doesn't respond – and they usually don't—brokers take it as a silent “no” and move on. But here's the truth: an email isn't follow-up. It's an add-on to the real work. A supplement. It might reinforce a message, but it will never replace an actual call, a second contact within the company, a voicemail that leaves an imprint. If you're not willing to speak – out loud, directly, and repeatedly – you're not prospecting.

5. THEY MISTAKE SILENCE FOR “NO”

Most brokers hear nothing and assume it means no. But 80% of deals happen between the 5th and 12th follow-up. That means silence isn't rejection. It's just delay. The broker who keeps showing up becomes the only one left when the prospect finally decides. Everyone else took themselves out of the game too early.

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1. LASER, NOT LUCK.

Let me put it bluntly: “Thank you, next” energy gets eaten alive in the brokerage world. You think one rejection means you're out? No. It means you're in the qualifying round. It's a stress test of your seriousness. Do you panic and pitch harder? Do you disappear like every other flaky broker? Or do you sit down, tighten your tie, and revise the damn strategy?

Real brokers – those who close 1000+ life groups – already expect the stall. “We're good for now.” “Maybe next quarter.” “Let's revisit next year.” These aren't rejections. They're scripted lines from the defensive playbook of mid-level management trying not to get fired. And unless you've built a prospecting process that includes a written, mapped-out, month-by-month playbook with contingencies for every stage of negotiation, you're just gambling with your time.

Take any top broker in this game. Sit them down. Ask how long it took to close their largest account. 12 to 36 months. Minimum. You think they didn't hear “no” fifty times before the first “maybe”?

But here's the fatal flaw: most brokers try to go big without building the muscle of consistency. They wake up one morning and decide, “I'm going to target 500 companies,” and then die a slow death by spreadsheet. You can't become consistent with 500 targets if you've never been consistent with one. That's not a strategy. That's desperation in disguise.

That's why I tell my clients to build what I call the Laser Prospecting List. One page. Thirty names max. Not leads. Targets. Companies you've researched. People you've studied. Decision-makers whose business problems you've actually taken time to understand. Then you go all-in. All year. You follow up until it's no longer a follow-up – it's a relationship. And if they say no? You rework your angle. If they go dark? You resurface in a new way. If they ghost you after a proposal? You treat that silence as a signal, not a stop sign.

2. NEVER, EVER, EVERY RELY ON YOUR MEMORY OR HANDWRITTEN NOTES.

You're chasing six-figure deals, trying to recall which CFO asked for a case study in January while you were mid-airport-espresso, and relying on Post-it notes like it's 1997? Spoiler alert: if your CRM is still "your brain," you're not running a business – you're gambling with cognitive decline.

Your follow-up system needs to be digital, centralized, and mobile-accessible. Because one day, you will be running late. And instead of frantically scrolling through texts, emails, and Slack messages trying to remember who Janet was (Was she HR? Was she Finance? Did she ghost you or did you forget to follow up?), your CRM should instantly tell you:

- Who the decision-makers are
- Who their assistant is and how many times you've talked to her
- What content you sent and when it was opened
- Whether you had a pricing conversation
- Who joined the group meeting last quarter
- What internal language they used when describing the problem
- What stage they're at and what beat you're waiting on next

This isn't about data hoarding. It's about clarity. When you know exactly where the deal stands, you don't send random "just checking in" emails. You move with intent. So get the CRM, make sure it syncs with your phone, and use it like your career depends on it—because it does.

3. BUILD A STAGES FUNNEL.

There is a difference between where the prospect IS and where you WISH they were. Just because you had a good vibe during the first conversation on the phone, doesn't mean they're ready to leave their broker of 18 years and name their child after you. That's why you need a Stages Funnel. Not a 12-step SaaS monstrosity. Just 3-4 checkpoints like: NEVER MET, WARM INTEREST, ENGAGED DISCUSSION, DEAL IN PLAY. You know, something that makes it impossible to confuse a handshake for a proposal.

Because here's the thing. When you skip the stage-awareness part, you start sending emails like, "Are you ready to move forward with the plan redesign?" to someone who hasn't even replied to your message yet. That's like showing up to a first date in a wedding tux. It's not bold – it's terrifying. Respect the rhythm of trust.

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4. CREATE THE "DEAL BEATS."

Deal-making isn't about gut feelings or good conversations – it's about movement. You need measurable, trackable, trigger moments. I call them DEAL BEATS. These are the pressure points in the deal timeline that, when hit, tell you: "Okay, we're moving."

Here's what that looks like in the real world:

- Group meeting with multiple decision-makers
- Prospect sends over their plan design for review
- They ask for a claims analysis
- A CFO starts asking cost-containment questions

Each of these beats says: This person is in motion. This deal is alive. Proceed. The point is: don't get poetic—get predictive. When X happens, Y is more likely. That's your rhythm.

5. ONLY YOUR PROSPECT'S ACTIONS COUNT.

Here's the harsh truth: no one cares how many PDFs you sent, how many times you called, or how beautifully you color-coded your sales deck. You are not the main character of the deal. The prospect is. Thus, your DEAL BEATS should be THEIR actions – not your effort.

Did they show up to the group meeting?

Did they loop in the VP of HR?

Did they send back requested data?

These are real signals. You getting excited and “feeling like it’s going somewhere” is not a signal – it’s a sugar high. You want to get better at tracking deals? Track the shift in their behavior, not your mood swings.

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6. REACH OUT TO MULTIPLE DECISION-MAKERS.

In corporate America, no one decides alone. If you're only talking to one person, you're not having a conversation – you're playing telephone. You need to own the room, even if you're not in it. That means multiple emails. Group invites. First-degree connections. And yes – befriend the assistant.

Now, some brokers worry this looks aggressive. No. Aggressive is kicking the door down. What you're doing is tactically charming. Strategic visibility. You're showing them that everyone involved is getting informed – so if the VP of HR forgets your name, the CFO will fill him in. You're not annoying. You're omnipresent. And in brokerage deal-making? Omnipresence beats charisma every damn time.

7. FOLLOW-UP IMMEDIATELY

You know what most brokers do after a call? They wait. They give it space. They don't want to seem "desperate." Here's a newsflash: you ARE desperate if you act like that.

Prospecting Broker secret hack is simple: after the call, don't chill. Attack. Hit them with a follow-up immediately. Hit them on email, voicemail, social, and anywhere else they have a pulse.

You think this is overkill? Good. That means you're doing it right. In a world where 99% of your competitors still act like it's taboo to send a second message in the same week, you're going to dominate by being everywhere.

Create a checklist. Email? Check. LinkedIn message? Check. Voicemail with a callback time? Check. Pinned tweet? If needed – check. You're not spamming. You're surrounding. Be respectful, but UNIGNORABLE. That's how real follow-up works.

Now that you've built the structure—the CRM, the deal beats, the funnel stages—it's time to talk about what actually fills it. Because here's the trap most brokers fall into: they finally get their follow-up system in place... and then flood it with nothing but self-funding content. Slide decks, carrier comparisons, whitepapers on level-funded plans—over and over, as if their prospects wake up thinking, "I really hope someone emails me about stop-loss insurance today."

They don't.

That's why this next section is dedicated to general content—smart, relevant, thought-provoking material that speaks to your prospect's role, their industry, their day-to-day pressure points, and sometimes, even their personal growth.

Mixing in content that resonates with who they are—not just what you're selling—isn't fluff. It's strategy. Let's dive into the types of content that do exactly that.

STRATEGIC FOLLOW-UP CONTENT (ZERO INSURANCE)

1. LEADERSHIP INTERVIEW SUMMARY

Share a takeaway from a recent podcast, book, or event featuring a respected CEO or economist. Not the link—the insight. Example: “Larry Fink said something this week about leadership under pressure that really applies to mid-sized companies.” This works because it elevates your credibility—you’re not sending spam, you’re sending intelligence.

2. INTERNAL PLAYBOOKS OR TEMPLATES

Offer something they can use with their team: an agenda template for annual vendor reviews, a checklist for internal budgeting, or a list of questions for evaluating outside consultants. This content isn’t about you—it’s about helping them lead more effectively. That’s how you earn repeat engagement without needing a pitch.

3. “INTERNAL FRICTION POINTS” MINI-SERIES

Create a 2–3 part series about subtle breakdowns inside mid-sized companies:

- Finance vs. Ops misalignment
- HR caught in policy vs. people tension
- Marketing vs. Revenue expectations mismatch

This builds massive trust because you’re talking about what they’re actually dealing with, not what vendors keep pitching.

STRATEGIC FOLLOW-UP CONTENT (ZERO INSURANCE)

4. END-OF-WEEK THOUGHT: "THIS MADE ME STOP AND THINK"

Send a Friday reflection. Just one idea, quote, or moment that made you pause. Something from a meeting, a book, or a pattern you noticed. This works because it's not about pushing. It's about anchoring. And in an inbox full of noise, quiet honesty stands out.

5. "WHAT YOU TOLD ME THAT STUCK" CALLBACK EMAIL

A month or two after a call, send a message referencing something they said. Example: "You mentioned last quarter that 'vendor decisions are mostly political now'—I keep thinking about that. You're right." This message isn't about being right—it's about showing that you listened. And in B2B, that's rare.

6. MONTHLY DIGEST – INDUSTRY / POSITION INSIGHTS

Send a curated, short monthly email with 2–3 relevant trends or articles tailored to the position of the decision-maker (not just their industry). For example, "3 things HR leaders are doing differently post-Q1" or "How CFOs are preparing for Q4 uncertainty." This works because it respects their time, gives them bite-sized value, and positions you as someone who understands their role, not just your service.

STRATEGIC FOLLOW-UP CONTENT (ZERO INSURANCE)

7. “SMART PEOPLE ARE READING THIS” DROP

Every few weeks, share a book, podcast, or article that other executives like them are paying attention to. This type of content builds affinity because it makes them feel plugged into a network of smart operators and gives you a low-pressure way to stay visible, without asking for anything. Bonus: it aligns you with thought leadership, not sales.

8. CALENDAR-BASED “ANCHOR” MESSAGES

Leverage calendar events—fiscal year-end, open enrollment, HR week, CFO quarterly check-ins—to send timely messages that aren’t salesy but are topical. For example: “If you’re prepping for budget reviews, here’s a one-pager on vendor accountability frameworks.” This type of timing makes the message feel helpful instead of intrusive.

9. THE POWER OF DOING LESS, BETTER

A short, perspective-shifting piece on why high-performing executives aren’t doing more—they’re doing less, but with more focus. Perfect for a midweek reset, especially for HR or C-suite leaders juggling five priorities and feeling the quiet pressure to always be “on.” This content works because it validates restraint as a form of power—and makes you the voice of clarity in their crowded inbox.

PROSPECTING CALCULATOR

TAKE THE
GUESSWORK OUT OF
PROSPECTING.

[CLICK TO ACCESS](#)

METRIC _____ Production Output per Action

VALUE PER MEETING _____ \$12,000

VALUE PER CALL _____ \$300

VALUE PER OUTREACH _____ \$15,000