

# An Introduction to Lead Generation

Simple Solutions to  
Attract Quality Leads



## What is 'Lead Generation'?

Lead generation is the process of attracting and capturing potential customers' interest in a product or service. In the lifetime mortgage industry this means finding individuals who might be interested in unlocking the value of their home and using effective strategies to nurture these leads in the hopes that they will become a customer.

## Effective ways to nurture your existing leads

It's always worth looking at your existing client base as a starting point. If you have several customers who are 55 or over, retired or approaching retirement, they may well be interested in the benefits which a lifetime mortgage could provide.

As part of your discussions with them about their financial planning, whether ad hoc or as part of their annual review, it might be appropriate to talk about the need for extra funds during retirement and the option of taking a lifetime mortgage as a way of fulfilling their requirements.



### Top tips:

- ✓ Stay in touch with your existing client base, send them newsletters to keep them in the know and educate them on lifetime mortgages.
- ✓ Keep your social media up to date with useful information and make it clear how you can be contacted.
- ✓ Referrals are a great way to gain new leads through trust, just remember to provide a high quality of service and be professional when asking for them.

## How to initiate interest with new leads

When capturing the interest of new leads in the lifetime mortgage industry, it is important to consider the advertising channels that you are using. The choices are endless, so it pays to take some time to understand your customer, decide which channels they use and where they are most likely to see your company. You also need to set a budget, as some forms of marketing can be expensive and generate poor leads. A good approach is to use organic and paid lead generation combined:

### Organic marketing

- **Email:** Regular newsletters or updates to subscribers.
- **Articles and blogs:** Content that provides value, builds authority and helps you rank on Google organically.
- **Social media content:** Engaging posts that build community and awareness.
- **Website landing pages:** Create content for your website, based on research into keywords customers are using in their search.
- **Case studies:** Add case studies to your website, and share in email, based on content from previous customers experience.
- **Calculators:** Add a initial lifetime mortgage calculator to your website, to generate leads.



### Paid marketing

- **Direct mail:** Create an eye catching leaflet, postcard or flyer and post to your prospective leads.
- **Press advertising:** Adverts in newspapers, magazines or online publications.
- **Events:** Trade shows and expos.
- **Posters:** Utilise shop fronts and public space notice boards with a poster.
- **Paid social media adverts:** Once you have chosen your social media channel, look at sponsored posts to build awareness.



#### Did you know?

24% of Facebook users are over 55!

Source: Giraffe Social



#### Did you know?

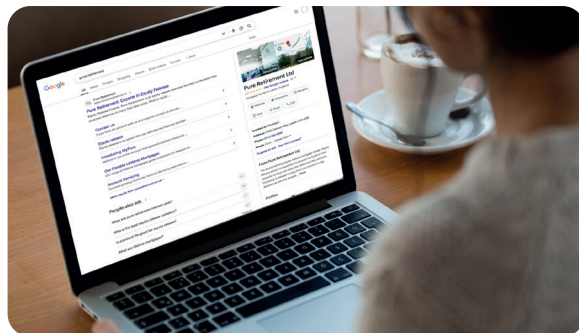
89% of B2B marketers use LinkedIn for lead generation

Source: LinkedIn



## Stay on top of your website

An important and often overlooked aspect of lead generation, is a great website that portrays the credibility of your business. Up to date, relatable content, a simple design and easy navigation are the key things you need to get right, as well as making sure your contact details are easily found on the website and with Google business.



### Top tip:

Google Analytics 4 is a great tool for monitoring the use and navigation of your website to see if it's as effective as you would like. If you would like to give your website a refresh, you can find prospective web developers through a simple internet search, to see if they are a fit for both your needs and your budget.

## Lifetime mortgage calculator

Having a quick lifetime mortgage calculator at the forefront of your website for customers to use, is a fantastic way of generating new leads. It gives customers a view of how much they can borrow and creates an opportunity to contact them. Be sure to make it clear to potential customers that by supplying their email address, they are confirming they are happy for you to get in touch with them.

**How much  
tax-free cash  
can you unlock  
from your  
home?**



Use our free calculator to get a view of how much tax - free cash you could release to help you live your life, your way.

**How much is your property worth?**

Please enter the approximate value of your home.

£

**How much do you have left to pay on your mortgage?**

We'll use this to calculate how much equity you have available.

£

**How old is the youngest homeowner?**

This affects the amount you'll be able to release.

**What's your email address?**

**Calculate in seconds**

### Third-party and introducer relationships

Working together with other professionals such as local accountants, solicitors and estate agents can also be a worthwhile pursuit. Mutual promotion of each other's businesses can work well for all parties involved, and the cost of shared promotional events or marketing materials can also be split between you. To network with other professionals and find like-minded businesses, you can join your local chamber of commerce, which will also grant you access to an up to date members' directory and give you a ready-made contact list for potential partners or introducers.



Approaching financial advisers who do not advise specifically on equity release is another way of finding new clients. While they cannot advise themselves on lifetime mortgages, they are still able to help their interested clients by passing on your details as someone who is able to assist. These are often quality leads as you will have been recommended by the

client's financial adviser with whom they have a trusting relationship, and on most occasions, you will not be in competition with anyone else. The downside is that you will need to provide a form of finder's fee, whether this be a set amount or a percentage of the value of the business, but the reliability and warmth of these leads is often worth the fee.



### **Purchasing leads data**

To compliment the other lead generation approaches it is worth looking into the purchase of leads from lead generation companies, which can be costly but has the advantage of being well researched, accurate and up to date at the time of purchase. To find a mailing bureau you can have a look in your local business directory or research through a website search engine.

It's always worth checking the marketing permissions on the data you are purchasing, to ensure that those included can be contacted for your purposes. Be specific about the data you are asking for, ensuring it matches the type of customer you are looking for, and it's always a good idea to start by purchasing just a small sample of data - 500 to 1,000 contacts - rather than the whole list. You can then use the small sample to test it and see what response you get, before investing in a fuller list of potential clients.



## How can we help you?

Boost your business presence with our free Marketing Toolkit. Our service offers ready-made digital and print items, that can be personalised to your own company branding. Our designers will tailor your chosen items and provide them in a format ready for you to use!



Referral Cards



Social Media Adverts



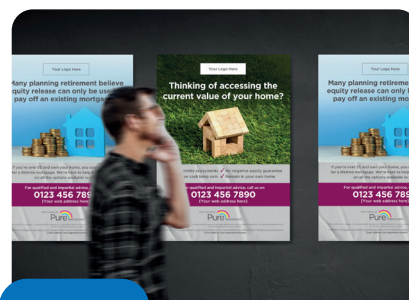
Flyers



Press Adverts



Event Banners



Posters

**Ready to get started? Submit your toolkit enquiry [here](#).**

Disclaimer: By using our white-label marketing services you will be liable for any compliance breaches and advertising at your own risk. Advisers must always run by their compliance department and add any necessary disclaimers if needed.

**Always ensure that your lead generation practises comply with data privacy laws and the FCA's Consumer Duty.**

☎ **0113 366 0599**

✉ **info@pureretirement.co.uk**

🌐 **pureretirement.co.uk**

Company registered in England and Wales No. 7240896.

Pure Retirement Limited, 2200 Century Way,  
Thorpe Park, Leeds, LS15 8ZB.

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