Episode #159: How an Advisor Landed a $400,000 Annuity and $350,000 in AUM in 14 Days

Video Transcription

Hello there, and welcome back to another episode of "Money Script Monday." My name is Dan Tatulli. Today, we're going to be talking about how an advisor landed a $400,000 annuity and $350,000 in AUM in just 14 days. I wanted to share this story. This recently just came up. But I'm sure a lot of you can relate out there. This was an advisor who practically built his business off of seminars. We're talking dinner seminars, the educational workshops at those libraries. And what he did was he recently moved to Florida, and he put a pause on his marketing efforts just because in Florida, dinner seminars were getting just bombarded with direct mail pieces day in and day out of the next annuity presentation coming up. He hit pause on that. But given the recent climate that we've all been forced into, seminars are on break right now. We don't know when they'll be back 100%. We all, as financial advisors, need to do something about that. He reached out to us, and we said, "This is perfect timing because LifePro right now is building a webinar platform for advisors. would you be interested in piloting this program?" And he said, "I always wanted to get into webinars. I just didn't know how to get started." It was really a perfect marriage for that.

What we did was we got him connected with the webinars. That's what I'm going to be going over today is really how he was able to land this policy through webinars. We're really going to go over two things. One is just all of the things that he needed to do on his end to get started in less than 14 days. And then really this is not just any webinar model that we're talking about, this is six critical steps that you need to do to have a successful webinar. We're going to be going over that as well. For this advisor, we said, really, this is the initial setup. These are the three things that we need to get started to help you with these webinars. First off, we need the webinar and scheduling software. The webinar software, that is the video, right? The link that people click on and they watch the webinar on the screen there. We got him connected with that. As well, the scheduling software. This is at the end of your presentation; you want to be driving people to a website. And what we wanted to do, we wanted to make it as seamless as possible. You need a scheduling software that can actually connect to your calendar, and in real-time, clients can see what time you're available and actually book an appointment right then and there. Those are the two things that we helped that advisor.

Next is a signature presentation. I'm not just talking about like fancy slides on a PowerPoint, but if any of you were at the LifePro Summit, you heard a gentleman by the name of Pete Vargas. He talked about a signature presentation, and it's super powerful. He said, if there was only one thing if he had to build his business up again, and if there's one thing he needed, it was a signature presentation. This is not just the PowerPoint, but this is really how you conduct business. This is your napkin approach per se, with that. LifePro has created several signature presentations. The one he selected was really a presentation focusing on protected retirement income. This talks about social security, annuities, and then supplementing some of that with index universal life and assets under management. We got him connected with all the presentations and the tools and resources.

We've got the platform, right? We got the stage of the webinar. We've got the right message. Now, we need to drive traffic to the webinar. And what we did was he didn't really have a database that we can leverage with that. What we recommended was Facebook marketing. LifePro has a team of marketers here who can manage your Facebook ads, so you don't have to do any of that. And it's not just going in there and throwing up an ad. But what we've done is we've partnered with Facebook. We've created proprietary audiences basically connecting our information and saying, "Hey, listen, these are LifePro clients throughout the past. These are the best, the ideal annuity and index universal life clients, go out and match them." What we do is we share this data. They say, all right, they have a snapshot of the ideal clients, and they'd go out there, and they find people with the same interests, behaviors, the income, where they live, all of those types of things that LifePro has partnered with Facebook. And these are proprietary audiences that you can only get at LifePro here.

Those were the three things that the advisor needed to do for that. And that was just going off and conducting the webinar. But like I was saying before, it's not just any old webinar. There are really six specific steps needed for a successful webinar. A lot of organizations out there stop at the we'll put up some ads, you got the registration, and go do your webinar, but we didn't want to stop there. What we did was we took some of the successful things that LifePro did for their seminars, but then we also went out and looked at what the most successful online entrepreneurs are doing. People like Frank Kern, who's basically the grandfather of webinars. People like Russell Brunson from ClickFunnels and Ryan Deiss from Digital Marketer. We looked at and analyzed all of the things that they're doing. And we've really identified six key areas to put on for successful webinars.

Now, I'm going to be going over what LifePro has built for this. And if you guys are interested, we have some information on here, so you can click, and we can move forward and help you out with these webinars. The first one is the traffic. I already talked about this, but whether it's through email or Facebook, wherever you get the traffic from, we can help you manage that. What we do is drive traffic to the

registration page. We've already built these registration pages. They're specific to the signature presentations. They have all the right ad copy and the images and all that, but it doesn't stop there. If people register, they go to a confirmation page where we've produced several videos. This would be a thank you video we call it, where the person registers, and they immediately go to a confirmation page where these are produced videos, where we reaffirm their decision. And we show our excitement for the presentation and say, "Hey, we can't wait. We look forward to seeing you at the webinar." these are videos. We wanted to do videos because it engages much better than just like a few bullet points or text on a screen. We've already produced these videos for you.

Going onto the registration phase, we move to the indoctrination phase. Now, a lot of companies skip past this. And quite honestly, a lot of people don't even know what this phase is. The indoctrination phase is before the webinar. When people register, you might have a three-day lapse, and really there's no communication going on. What we've done is we've built an indoctrination sequence within your webinar platform. Indoctrination sequence, we send them automated emails sending them to a landing page again with a video. And it's not the same video; it's actually another one where, again, we're just hyping up the webinar. We're showing our enthusiasm for the topic, and we do a mini-presentation right then and there. We take a few of the slides from the presentation and talk about those concepts right there. The purpose of that is to not only like qualify people and get them excited for the webinar, but also disqualify people. Some of the concepts that we're talking about and we're calling out specific audiences; if it's not for them, we don't want them to waste our time with those webinars. That's what it's all about. And that's what we built within our webinar platform.

The next phase is the reminder phase. I'm not going to spend much time here. This is just people are going to forget that they signed up for a webinar a few days ago. What we do is we send them a sequence of email reminders that day. Morning of, an hour before, and then 15 minutes before the webinar. And it's not just emails; we're also sending them text message reminders too. We drive people to the actual webinar. This is you; this is what the advisor needs to do. Up until this point, this has all been automated on your behalf. You actually conduct the webinar. You use the signature presentation. This advisor was able to land that through the signature presentation and that scheduling software that I talked about earlier. However, with webinars, you're going to see national numbers say you can expect about a 30% show-up rate to your webinars. Luckily, LifePro has seen those show-up rates go a little north of that because of all of these steps that we're doing right here to help you out with that and drive up those attendance numbers. However, most people aren't going to show up for your webinar. What we've done at LifePro is we've created a post sequence, and it's not just one sequence, there are really three different groups of people that come post-webinar. These are people who attended,

and they booked an appointment, they go into a sequence and the sequencer automated emails and text messages and videos. And there's another one where people attended, but they didn't book an appointment. We have a sequence for that. And then people who just didn't show up to the webinar, we also have a sequence of emails, text messages, videos, landing pages, and all of that that we've built here at LifePro. This was how the advisor was able to land that case. And if you're interested, we'd love for you to be our next success story here. If you're interested in some of the digital marketing strategies that we just talked about today and interested in starting webinars with LifePro, the information is on this page. Scroll down below, click that button, and fill in your information and we'll reach out to you and get started. With that, thank you very much. And we'll see you next time.