

5 Ways to Get Qualified Leads to Chase You Instead

Hi there and thank you for tuning into another episode of "Money Script Monday." My name is Jaime Ramirez, and I'm a marketing coordinator at LifePro with a focus on finding unique ways to attract and find advisors for LifePro to help and to work with. Today, it's my honor to present to you on the topic you see here on the screen behind me titled "Five Ways to Get Qualified Leads to Chase You Instead."

This video is absolutely for you if you hate the idea of having to chase leads to work with. Wouldn't it be better if they chased you instead? If you're finding that the traditional ways of marketing are not as effective as they used to be, then you're not crazy and you're not alone. The purpose of this video is today I want to show you the fastest and most effective ways to build your clientele in the digital age.

We've all been there. You finally sit down for dinner at the end of a long day of work. You're about to take your first bite when the telephone rings. It's a telemarketer asking you for your oven preferences. This frustrating interruption doesn't need to happen, and it really leaves a bad taste in your mouth, no pun intended. But for the sake of time, I'm going to focus this video on lead generation strategies for financial advisors with hopes that you'll be able to apply something you learned today to your practice.

LifePro has helped thousands, and yes, thousands of financial advisors across the country, from Colorado all the way to New Jersey, successfully generate leads, appointments, and clients 100% online. So, the big question is, how can you get a steady flow of leads, high-quality appointments, and clients each month to your business?

Some of what you see on the board and what I say today, you might already be doing, but there are small tweaks and things you could

update and adjust that just might make the biggest difference in the results of your efforts.

I want to start by exploring the old versus the new way of getting leads. And what I mean by that is that many financial advisors have relied on old traditional marketing strategies that are available to them, such as cold calling, referrals, buying leads, direct mail, and word of mouth. Some of these work, sure, but they can be very time-consuming, expensive, and definitely not very predictable. Like we talk to clients about all the time with the benefits of a diversified portfolio, the same goes for your business marketing strategy.

Cold calling may have worked well in the past, but the reality is that the results are getting worse each year and the market is just way too saturated. This one in particular can be very draining and time-consuming. The success of cold calling is just 1% to 3%.

The next one we wanna talk about is referrals. Referrals are great but not predictable. If you want a consistent income stream for your business, you can't just rely on referrals. While referrals are valuable, sure, it should be only one part of the puzzle.

And the next one I wanna talk about is buying leads. When you buy leads, it often results in low-quality leads, who are not a good fit for your business. It can be a mixed bag and you don't always know what you're getting, especially if those are shared leads.

The next one I wanna talk about is direct mail. Direct mail is very expensive, juxtaposed with its digital marketing counterparts like social media. It can be very powerful when used intentionally and sparingly but should not be your main method of collecting leads.

Word of mouth is also great, but it's not cost-effective and it's hard to measure those kinds of results, right? It's more of a wait-and-see game, which again, shouldn't be used as a primary source for your lead generation efforts. You must be wondering then what are the better,

more effective ways to generate qualified leads? The new way to get your leads is to maximize the power behind automation and to have a consistent process.

The first two I'm gonna talk about are social media and Google SEO, which stands for Search Engine Optimization. This is when you rank at the top of Google searches for keywords related to services that your business offers. Basically, when someone searches for your services, we want you to show up at the top.

The question you need to be asking yourself is, "Are your potential clients finding you or one of your competitors?" If they're finding you, you'll be able to get a steady supply of high-intent leads that are actively looking for solutions to retirement-related problems that they have. But if they're not finding you, then you're missing out on new clients every single month.

How can you improve the searchability of your company? Post more content online. Answer questions your potential clients are searching for on Google. Write articles. Post social media content. Share materials or posts you find interesting and respond to comments. Basically, you want to show with your online presence how active and committed you are to the industry.

And the same goes for social media outreach. When a lead comes across your profile, you want to have painted a clear picture of you, your values, and your services. I encourage you to reach out to your field support representative to learn what other top advisors post regularly and what content LifePro has ready now for you to blast out.

The next two I'm gonna talk about go hand in hand as well. This is hosting events, such as webinars and seminars, and promoting with Facebook ads. Let's say that you've hosted a webinar or a live event. So, depending on the action that one of your prospects takes, let's say they didn't attend your event, they did attend your event, they booked an appointment, they didn't book an appointment. You're able to hit them

with targeted messaging that increases the likelihood that they'll take you up on your offer and take that next step with you. This is really something that's important to us here at LifePro, which is why we spent so much time building a proven sales system that can help you attract, acquire, and retain clients online.

This is particularly important right now as America really prepares for the biggest wealth transfer in its history. Heirs in the U.S. can expect to inherit \$72.6 trillion over the next quarter century, more than twice as much as a decade ago. That's a large pool of prospects browsing around the internet for your services. You just have to help them find you. So, how do we get people to your events?

That's where this next one comes into play, which is Facebook ads. It's one of the fastest ways to get leads, appointments, and clients. Facebook ads produce fast results, they're very scalable, and you can test new ideas really fast. We're always testing out new design and copy for ads over here on the marketing team and closely monitoring advisor campaigns. The cons from your perspective is that it can be expensive, but if you haven't found that winning formula, luckily, LifePro has already figured that system out for you. I definitely encourage you to reach out to your field support representative to learn more.

And the last one I wanna touch on is email campaigns. Email is so unique in that it gives you direct access to your leads. With email, your message gets right to their inbox. That's really prime real estate and it's really a great opportunity for you to connect, and that's something LifePro will do for you, provide client-friendly content to send out to your book of business. It'll definitely depend on what's going on in the industry at the time. But right now, for example, we're really focused on annuity. It's hard to overlook that annuity sales skyrocketed in 2022 and they continue to break records. Depending on what's going on at the time, as you can see, we can really adjust any message and get that out to your clients quickly. A lot of the new ways of doing lead generation complement each other and work really hand in hand.

While the webinar program that I mentioned helps advisors generate new leads, it also helps them grow their lists alongside their existing list because in reality, a client might not be ready to move forward with you at this moment, or when you hosted that event, or when you posted that thing on Facebook, or when you sent that email, but they might be more willing to take you up on that offer down the line. That really is the magic of lead generation. So, if you found any of this content valuable today and you'd like to learn a little bit more, again, I really encourage you to reach out to your field support representative. Thank you so much for your time.