

Episode #354 – Accelerate Conversions with Cross-Channel Marketing

Hi there, and welcome back to another episode of Money Script Monday. My name is Jaime Ramirez, and I'm a marketing coordinator here at Simplicity San Diego. You're in for a real treat today. For this episode, I want to address the number one concern I hear from advisors regarding their marketing efforts: how do I close more business? How can I make my marketing work better?

That's the million-dollar question we will address today—how can my marketing efforts lead to actual paid business? From when someone becomes your prospect to the time they get to the appointment phase, what are you doing in between, and what can you be doing to accelerate those conversions?

Let's get into some numbers. 7. 72. 70. Seven is the average number of times the average consumer interacts with a brand before purchasing. These are the steps from acquisition to sale and when trust gets formed. 72% of consumers say they would rather connect with brands and businesses through multi-channel marketing, and 70% use three or more channels when researching a purchase. This is what will help you move prospects through the funnel more effectively.

What does a multi-channel marketing strategy look like? That's what you see on the board here today. We're talking about lead generation, websites, database, and email nurturing, and I'll go over them in this video.

The first one I want to discuss is lead generation, which is the umbrella term for all these other channels. You need prospects to talk to, and the number one lead generation source for advisors today is through educational webinars and workshops. COVID really accelerated this shift, but it's become a new standard at this point, and we haven't gone back. So, how do you stand out to your prospects?

Chances are you're one of three financial advisors they might be vetting out – so by staying in front of prospects and remaining top of mind, you're giving yourself a competitive edge over everyone else. More importantly, you're creating a non-sales environment where prospects can very clearly get to know you and build trust with your business and your services.

But there's a right and wrong way to do it. If you're sending too much information or not the right kind – you risk your prospects unsubscribing and moving on to the next. You want your prospects to come to that realization independently and naturally – and there's a strategic way.

The number one way our advisors gain new prospects outside of referrals is by hosting educational workshops. Plain and simple, this positions you as an authority in the industry on topics such as Social Security, taxes, annuities, investments, college planning, and more. Our advantage in events is that it's been field-tested to attract qualified leads and has developed into a robust event marketing funnel that utilizes automation to help grow all lines of business. We provide venue recommendations, presentations on various topics for you to present, audience engagement strategies, and workshop marketing collateral. Our subject matter will motivate your prospects to schedule their first appointment.

Moving to the website. Think of your website as your digital storefront. It's meant to educate visitors about your business, products, services, and unique value proposition. The 5-second test is a great way to measure the success of your website with new folks. If they can figure out who you are, what you do, and how it can help them within 5 seconds of landing on your website, you've captured their attention and got them on the hook.

Email nurturing is one of my favorites because you can utilize storytelling to build relationships with leads and guide them through the

sales journey. Automated emails aim to provide relevant content and build brand awareness and trust. We have tons of email campaigns ready for you to tap into today, ranging on topics from IUL to taxes and annuities. For our advisors who host educational workshops, their email marketing efforts tend to lead to higher clicks and open rates because this group is a much warmer, more engaged list so they go hand in hand here.

Once you start to grow your email database and have prospects in different parts of the funnel, it can be overwhelming to manage alone without the proper automation and systems in place. A well-maintained database can provide valuable insights into prospect trends and preferences, potentially improving client conversion rates and driving business growth. Consider it a Birdseye view of your marketing efforts for more effective lead engagement and follow-up.

As you can see, Simplicity is committed to creating a marketing ecosystem that works for your business. Each piece of the puzzle builds on the others to maximize your efforts without burdening you with more time away from your clients.

If you're interested in tapping into any of the resources I discussed today and learning more, I highly encourage you to contact your ADC to get started immediately. The new year is just around the corner, and there is no better time than now to commit to a well-oiled marketing machine that can transform your business in 2025. Thank you so much for watching, and we'll see you next week!