Lead Generation and Client Attraction Success Story

How a Certified Financial Planner's brand new marketing funnel **doubled his opt in subscriber list** and **added five-figures to his revenue from September 2015 to January 2016**

Services Used:

LeadPages, 1 Shopping Cart, Facebook Fan Page, Facebook Advertising, MailChip, Instant Teleseminar, and VideoMaker FX

Background

In May 2015, CFP® Steve Juetten realized that his ezine subscriber list was stuck at about 600 subscribers for what seemed like years. Open rates for his ezines were holding steady at 30% or better each time, but growth of the list was not really happening. Financial planning clients tend to sit on the list for a good long while before they feel ready to say YES to engaging. Steve has always been patient and consistent in delivering useful, insightful content to inform his subscribers about financial planning topics and engage when they feel inspired to do so. It's worked pretty well so far.

Goal: Grow the List and Invite Retirement Readiness Check Up Engagements

In business since 2002, Steve's fee-only, fiduciary personal finance business was doing well guiding busy professional people to manage their money so they could have more time to do the things they love. **Steve wanted to jumpstart lead and client attraction to welcome an influx of new leads and clients before the end of 2015.**

In Steve's business, among the most urgent problems clients want to solve is figuring out if they will ever have enough money to retire. When clients determine that they have some catching up to do, they realize that they need even more support to get their investments, savings plans, and other initiatives in smart motion to make their retirement dreams real.

His firm offers Retirement Readiness Check Ups to clients who want the answer to this urgent question. Steve realized his team could put more focus on this service and potentially attract even more perfect clients to benefit from his company's ongoing, fee-only financial planning services.

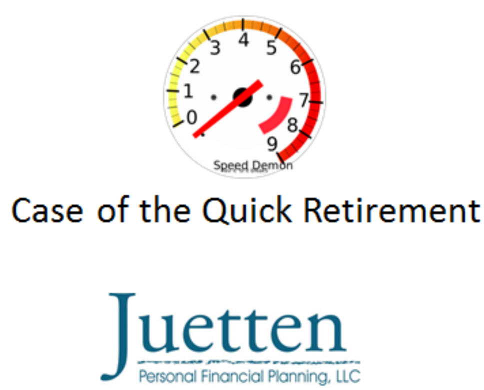
How Steve Got the Job Done

1) Steve started creating and sharing useful content and case studies about how busy professional couples deal with getting ready to retire. He shared the content via his ezine, **his blog**, and his brand new business fan page at Facebook.

   Here are two videos he posted to his blog and to his FB Fan Page. Each offers an invitation to access Steve's Ready Set Retire Quiz:

Animated 1 Minute Video – 938 views so far:
(click on image or link to view)

10 Minute Video Case of the Quick Retirement – 71 Views So Far
(click on image or link to view)



2) He created a Ready Set Retire Quiz to help people self-diagnose their readiness to retire, along with a simple auto responder sequence to guide quiz takers to learn more about how Steve and his firm could help. LeadPages reports that 11% of folks who visit the page -- mostly driven by FB advertising -- click through to get the quiz.

Ready-Set-Go-Retire-Quick-Quiz 11% 605 5664

3) This is the auto responder message series in place to nurture new leads and invite folks to request a consultation.

Message Subject	Schedule
Your Ready Set Retire Quick Quiz Is Here %$firstname$%	Day 0
What Was Your Score on the Ready Set Retire Quick Quiz %$firstname$%?	Day 3, 12:00 AM ET
Anticipating Retirement? This Retirement Planning Mistakes Webinar Encore is One to Watch!	Day 7, 12:00 AM ET
When Can You Retire? Let's Find Out %$firstname$%	Day 10, 12:00 AM ET

The second auto responder message showcases **a video of Steve delivering financial planning content from a stage**. Video creates know-like-trust quickly beyond words on the page. There have been 58 views of this video so far.

4) Steve debuted a Business Fan Page on Facebook.

5) Steve also created a simple Facebook Advertising Campaign targeted to reach his ideal client and added a FB advertising pixel to track results. So far, there have been 50 Likes, 18 comments, and 36 shares. He started the campaign in September of 2015 with a budget of $30 a day and stayed with it.

Hi, I'm Steve. I help married couples figure when they can retire and start doing more of what they love.

Take the quiz to find out when that can happen for you:

http://readysetretirequiz.com

How Soon Can You Retire?

Find out in the next few minutes.

READYSETRETIREQUIZ.COM

Learn More

50 Likes 18 Comments 36 Shares

Like Comment Share

6) Because October is National Retirement Readiness Month, Steve decided to offer a live webinar on October 29 to address Common Retirement Mistakes and How to Avoid Them in October. He invited everyone who opted in to his Ready Set Retire Quiz to the webinar and also invited his other loyal ezine subscribers to sign up to benefit. During this webinar, he made an offer for a Retirement Readiness Check Up.

7) Steve then sent a replay and access to a second useful gift – The Retirement Checklists -- so his busy professional clients could have the convenience of listening. He created urgency to act by mentioning that the first 11 folks to say YES to his offer would also receive a valuable custom portfolio review as a BONUS for making a timely YES decision to book their Retirement Readiness Checkups.

What RESULTS did Steve welcome?

- Steve's new Facebook Fan Page now has 152 'likes' having started at zero.
- 615 qualified leads engaged in Steve's Facebook advertising campaign at a cost per lead of $6.64 according to his Facebook Advertising Dashboard. That more than doubled size of his formerly stagnant ezine list.
- The Dashboard in LeadPages reports that:

    - 604 folks downloaded the Ready Set Retire Quiz.
    - 104 folks registered for the October 29, 2015 webinar.
    - 121 folks accessed the replay and the Retirement Checklists.

- 69 live callers participated in the October 29 webinar according to call detail reported by Instant Teleseminar.
- As of January 2016, 9 clients have said YES to their Retirement Readiness Checkups.

    - 4 have paid.
    - 5 are pending and will be scheduling soon (financial planning clients take their time to schedule things ...)
    - Each assignment is valued in the $2500 - $3500 range. The fee depends upon the complexity of each client's investment portfolio.

- Best of all, 50% of Retirement Readiness Check Up clients typically upsell to benefit from ongoing investment advisory services after benefitting from the fiduciary guidance and insights provided during their Retirement Readiness Check Ups. Based on the lifetime value of a client for Steve's services, these new clients represent $100,000 in new business for Steve's firm over the next five years.

Next Steps

- Steve is so happy with this first effort that he is planning more webinars for 2016 for April, July, and October.
- He will keep posting useful content to his blog and ezine and keep the Facebook Advertising in motion to keep building his list.
- Next time, he will revise his LeadPages so that clients can access their Ready Set Retire QUIZ and immediately get invited to register for the live webinar as opposed to keeping those efforts separated by several weeks. There was a delay for this first

effort because the emphasis was FIRST to grow the list and get it to a place where there would be enough people to invite to a live webinar.

- He will also revise his offer slightly so he can:

  1) Invite folks to engage with his one-on-one service with the same investment portfolio review as a limited time only fast action bonus.
  2) Suggest a **'Retirement Plan in a Weekend' invitation** to serve busy working professionals who need this urgent problem solved and prefer the convenience and lower tuition associated with this option. Steve would love to invite 100 couples to engage in this virtual training event in 2016. Those clients also offer great potential to upsell to benefit from ongoing investment advisory services with his firm, while allowing Steve to leverage his time in service to more couples who can benefit from his guidance in this urgent area of their lives.
  3) Depending upon how well results from the April campaign flow, Steve will consider recording an "evergreen" version of his webinar so he can easily repeat it using Instant Teleseminar and come on LIVE for the question/answer portion. He can also have the option to use StealthSeminar and drive traffic to this automated webinar in an ongoing way, using Facebook Advertising and other means.

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