



Practice Makes *Perfect*

2020 Marketing Update: *The Good, the Bad and the Ugly*

This week I am going to cover the good, the bad, and the ugly of marketing in our current Corona-Economy. I will discuss the pros, cons, and results that I am seeing nationwide, so you have all the information needed to make the best-informed decisions for yourself. Marketing is an art, not a science, and the two biggest influencers on ROI are geographic location and specific types of prospects an advisor is most likely to close.

Many of our advisors have been on the webinar bandwagon for several months now and are generating a steady stream of new prospects in their schedules. Some advisors now have the ability to use venues to do educational workshops and are doing very well with their appointment setting and closing ratios, even though their response ratios are lower than pre-Covid.

Top Asset Producing Lead Sources:

- 1. Clients/Referrals**
- 2. Workshop Prospects** (pre-Covid)
- 3. RIS Leads**
- 4. Live Webinars**
- 5. Radio Shows**
- 6. Internet Leads** (WiserAdvisor/Paladin/Smart Asset/Ramsey/Google)

Webinar Marketing:

- 1. Big AI/Aaron**
 - **Pros:** Best for doing 3+ webinars per month, high responses statewide, only pay for the budget spent on the campaign
 - **Cons:** 3-month contract, \$1,500 monthly fee no matter how many campaigns
 - **RSVPs:** 60-100 for statewide digital advertising
 - **Costs:** \$1,500 monthly + \$1,500-\$2,500 per campaign budget
- 2. LeadJig/Acquire**
 - **Pros:** Best for doing 1-2 webinars per month, high responses statewide, data integrates with the metrics, no monthly fees or contract
 - **Cons:** Lower responses for locally targeted campaigns

- **RSVPs:** 60-100 RSVPs for statewide digital advertising or 20-30 RSVPs for local 20-mile radius advertising
- **Costs:** \$2,500 total campaign cost

3. STEEP Marketing

- **Pros:** Good responses for local advertising, all-inclusive packages
- **Cons:** They won't do statewide campaigns, advisors are assigned territories
- **RSVPs:** 25 for local, 20-mile radius, digital advertising
 - **Costs:** \$3,000 total campaign cost
- **RSVPs:** 40 for local, 20-mile radius, digital advertising
 - **Costs:** \$3,500 total campaign cost
- **RSVPs:** 50 for local, 20-mile radius, digital advertising
 - **Costs:** \$4,000 total campaign cost

Webinar Platforms:

1. Zoom Webinar Pro

- \$40 per month (100 attendees)
- \$140 per month (500 attendees)
- Recommended with LeadJig

2. Big Marker

- \$99 per month (100 attendees)
- \$189 per month (500 attendees)
- Recommended with Big AI

3. Easy Webinar

- \$78 per month (100 attendees)
- \$129 per month (500 attendees)
- Recommended with STEEP, free if you do 1 webinar per month for 100 attendees max

Digital Marketing Campaigns:

1. Social Security Maximization Report

- **Pros:** Inexpensive, prequalify prospects, they must schedule a delivery call
- **Cons:** Smaller "click-to-sign up" ratios due to scheduling a call and answering questions
- [Click Here](#) to see the ads, landing page and campaign

- ***(Will be tested shortly)***

2. Retirement Readiness Quiz

- **Pros:** Inexpensive, prequalify prospects, they must schedule a delivery call
- **Cons:** Smaller “click-to-sign up” ratios due to scheduling a call and answering questions
- Ads, landing page and campaign will be created and tested shortly

3. Retirement Survival Kit

- **Pros:** Inexpensive, Dave received 15 leads for the \$500 budget (\$33 per lead)
- **Cons:** May end up chasing leads to schedule call/appointment
- [Click Here](#) for more information

New Webinar Topics:

1. Women and Investing

- **Pros:** Higher responses as women are more active/engaged on Facebook
- **Cons:** Male advisors will need to send a disclaimer video prior to justify why women
- If you would like to test and measure this webinar please contact Naely at nroman@advisorsacademy.com
- ***(Will be tested shortly)***

2. Tax Saving Strategies

- **Pros:** High response ratios, additional topic to add to webinar rotations
- **Cons:** Can attract less qualified prospects and suited for offices that offer tax services
- If you would like to test and measure this webinar please contact Naely at nroman@advisorsacademy.com
- ***(Will be tested shortly)***

New Marketing Programs: (Demos)

1. Estate Planning Navigator

- [Click Here](#) to watch the demo training webinar
- **Pros:** Remote Estate Attorneys available to draft Wills and Trusts for only \$650
- **Cons:** Longer sales process to convert prospects
- ***(Will be tested shortly)***

2. Retirement Architecture

- [Click Here](#) to watch the demo training webinar
- **Pros:** TV generated leads that are prequalified, \$5,000 minimum commitment
- **Cons:** Expensive, competing with 2 other advisors given the same leads
- **(Will be tested shortly)**

Internet Driven Leads:

1. Smart Asset/ Smart Advisor

- a. **Pros:** Can generate qualified leads weekly with little effort, they can connect prospects through to you live as well, so you are not competing with other advisors, looking for a fiduciary in your area
- b. **Cons:** Pricing based on prospects assets (slightly cheaper than WiserAdvisor), competing with 2 other advisors, prospects are “window shopping” for an advisor, more expensive to be connected live rather than receive the lead by email
- c. [Click Here](#) to learn more about their system

2. WiserAdvisor/Paladin

- d. **Pros:** Can generate qualified leads weekly with little effort, looking for a fiduciary in your area
- a. **Cons:** Pricing based on prospects assets (\$50-\$250 per lead), competing with 2 other advisors, prospects are “window shopping” for an advisor, often buys leads from Smart Asset and recycles them
- b. [Click Here](#) for more information and follow-up processes

3. Dave Ramsey

- a. **Pros:** Reputable name, posturing, can generate qualified leads weekly
- b. **Cons:** Fairly expensive and can generate of less qualified leads
- c. [Click Here](#) to view their website

Closing Over the Phone Resources:

- [1st Call Outlines](#): Softer approach for webinar, radio and RIS prospects
- [Secure Document Upload](#): We can add this button feature to your website. Please click submit an MOF
- [BombBomb Videos](#): Email personal videos to build rapport, increase webinar attendance and recap appointments (*see below for more info*)
- [DocuSign Instructions](#): Making it easier to do business over the phone
- [Online CFQ](#): For 2nd calls, you can email the online CFQ for them to email back
- [Drawing Tablet](#): Same as having a whiteboard in your office, but on the computer

- [Visual Aids](#): Use selective PPT slides, Shiller Index, and other visual aids to support you
- **Virtual Appointments:** [Zoom](#), [GoToMeeting](#), [JoinMe](#) for 2nd calls to build rapport
- [Dave's Video](#): How to Close Over the Phone
- [Client/Referral Live Webinars](#): Free way to educate clients and get new referrals
- [Virtual Client Reviews](#): Great way to stay in front of clients and find new opps.
- [Finding Opps. With Clients: Detailed ways to find new opps. with clients](#)
- [RIS Lead Checklist, Resource Links, Videos](#): Everything you need for RIS leads
- [Webinar Campaigns, PPTs, Scripts, Videos](#): Everything you need for live webinars
- [Radio Follow-Up Process: Best way to follow up with radio prospects](#)
- [Radio CTA Cheat Sheet: Best call-to-actions to get leads from radio](#)

BombBomb Videos & Scripts:

Emailing personal videos to prospects is an excellent way to increase attendance in webinars, as well as increasing your appointments scheduled with any prospect. It is an excellent way to build rapport, branding, and posturing.

You can record a quick video message (30 seconds-5 minutes) and email that to any individual or list of your choice. This video is embedded in the email and opens, clicks, etc. are tracked for you. Increase your attendance ratios and appt setting ratios through videos. Here are ways it can be utilized:

Webinar/Workshop Prospects

- Day before the webinar/workshop to increase attendance ratios
 - [Webinar/Workshop – Video Script](#)
- Day after the appointment to cover key issues discussed
 - [Day After 1st Meeting – Video Script](#)

Radio Prospects

- Day the lead is received or first workday, after leaving a voice message, to increase appointments/calls scheduled
 - [Radio Leads LVM – Video Script](#)
 - [Radio Leads Call Reminder – Video Script](#)

RIS Prospects

- Day before the scheduled call to increase calls kept

- [RIS Leads Call Reminder – Video Script](#)

Hot Prospects

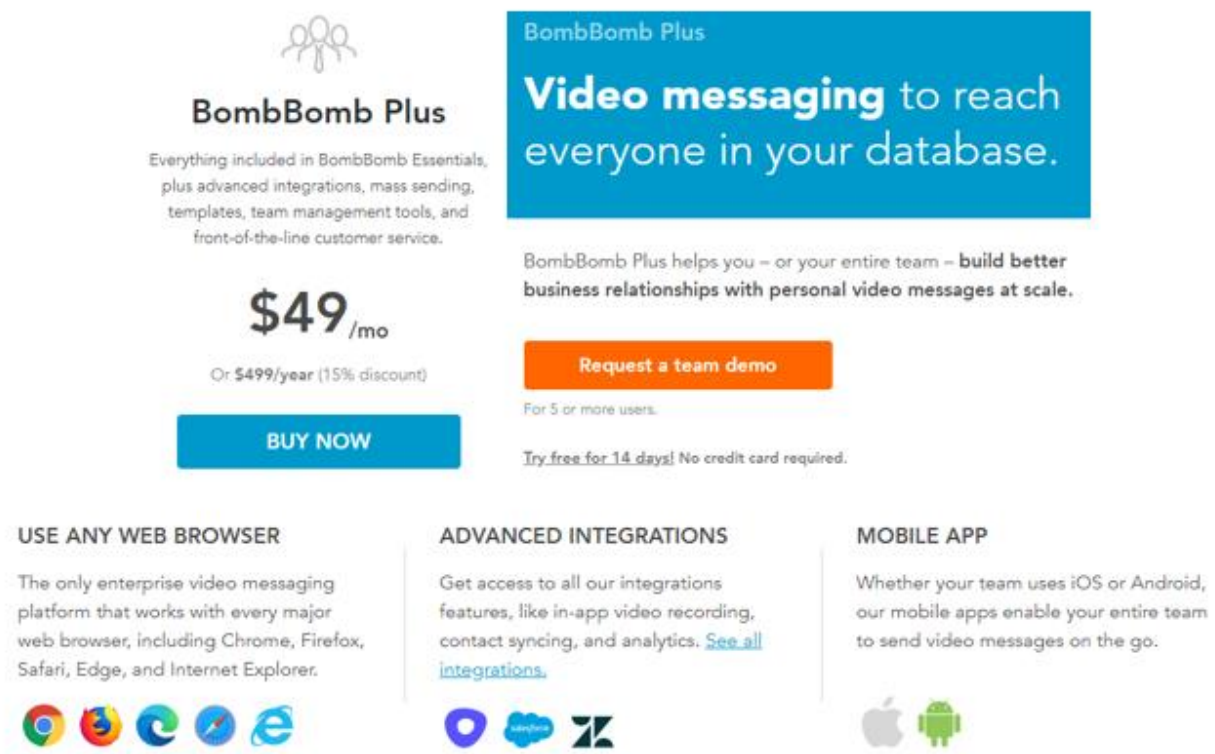
- Personal video to reengage them based on their specific situation
 - [Day After 1st Meeting – Video Script](#)

Cold Prospects

- Generic video to reengage them to schedule another appointment/call
 - [Reengaging Prospects – Video Script](#)

BombBomb also has other ways these videos can be used and is included in the package. Here are some other integrations and platforms the videos can be used:

- **Text Messages**
- **Social Media** (Facebook/LinkedIn)
- **YouTube**
- **Google**
- **Gmail/Outlook**



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MOBILE APP
Whether your team uses iOS or Android, our mobile apps enable your entire team to send video messages on the go.

Important Compliance Reminders:

1. You can use the text message function for webinar reminders and BombBomb videos, if you are signed up through the cell trust service, as this is the only way to capture, review, and archive the text messages
2. You cannot send BombBomb videos through your **personal** email accounts or **personal** Facebook. Only business accounts are permissible as they are archived through Smarsh
3. Submit webinar Facebook Ads, Sign-Up Page, PowerPoint, and Email Invite, prior to marketing the webinar: Advertising@soundincomestrategies.com
4. Record your live webinar for review and approval to send to compliance after the webinar to the email above

If you have any questions, please [email](#) or call Naely Roman at (954) 870-6731.