

10 WAYS TO GET MORE PROSPECTS



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We've seen and heard it all – you either don't have the time, the content, or the budget for successful prospecting efforts. Financial advisors understand the importance, but aren't always sure where to start or where to turn.

That's why we created this guide, to amass the best marketing ideas for financial advisors that can be used independently, or in conjunction with one another to create a strong system for attracting new prospects to your business.

On average, it takes 8 attempts to reach a prospect, but most salespeople give up after 4 attempts.

With so many touchpoints to reel in

new prospects, it can be frustrating to say the least. That's why the list we've developed combines a blend of organic and paid strategies that pay immediate and long-term dividends.

No matter which strategies you opt for, remember that building a relationship and connecting with your audience is the key to success when it comes to prospecting.

1 COLD CALLING

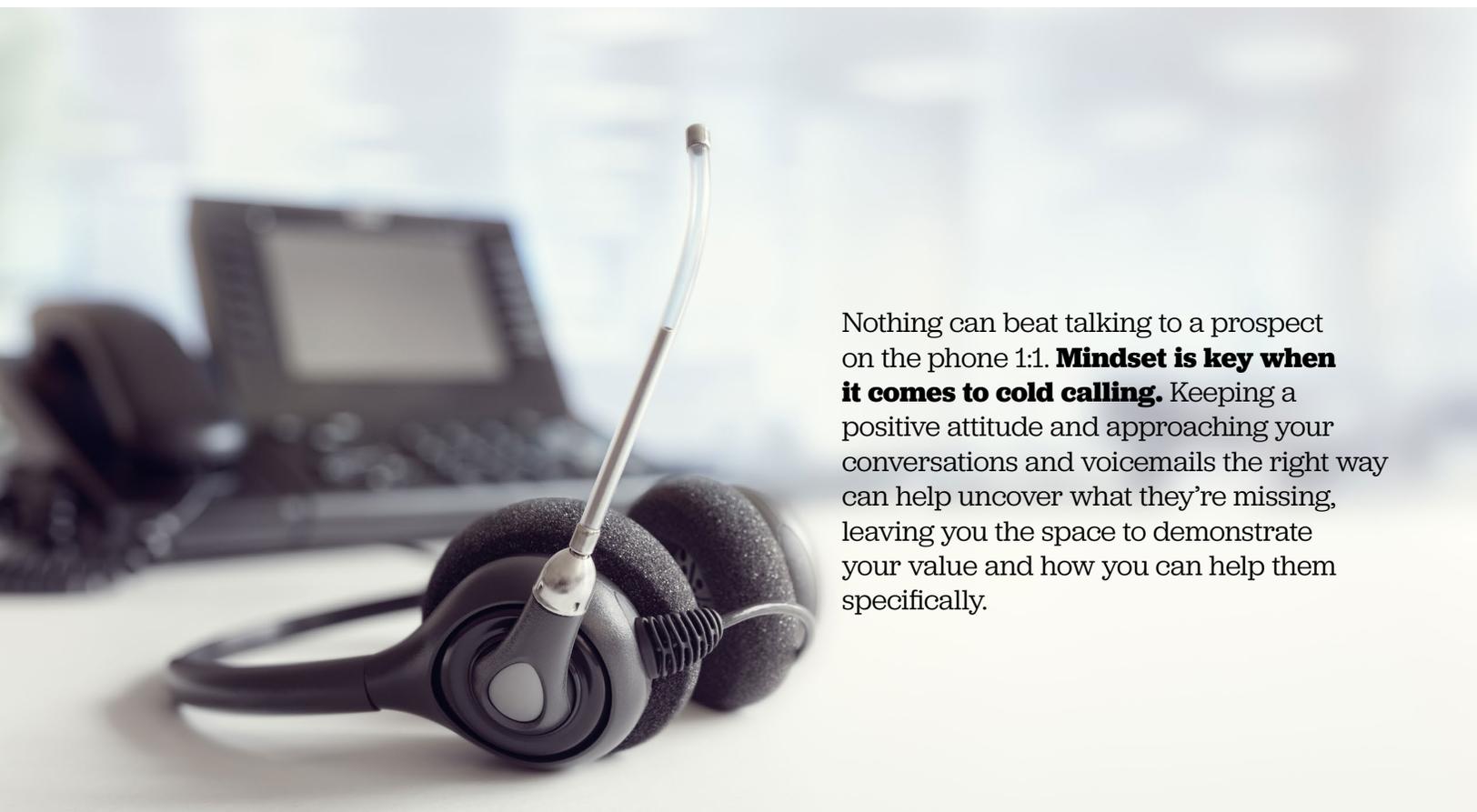
While this may be the least favorite option on the list, it is a tried-and-true method; and it's a numbers game. Nothing can beat talking to a prospect on the phone 1:1. Mindset is key when it comes to cold calling. Keeping a positive attitude and approaching your conversations and voicemails the right way can help uncover what they're missing, leaving you the space to

demonstrate your value and how you can help them specifically.

2 EMAIL MARKETING

Email marketing is an easily scalable method to reach prospects, making it no surprise that there's a 2x higher ROI with email marketing than there is with cold-calling. Leveraging this method also allows you to segment your database, empowering you to send targeted and specific messages by demographic, meaning you can match the right messaging to your audience for their problems at the appropriate time in your sales funnel.

You can also take the time to deliver them relevant content, offers, and information that will help you build a more personal connection and rapport.



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show no sign of going away. Virtual seminars are a great way to engage and educate many prospects at once. Building out unforgettable virtual events and seminars will help nurture your prospects and keep them engaged with your business. The key with these is to have a strong call-to-action to get them taking the next step after you have educated them.

7 DIRECT MAIL

Direct mail is a great strategy when used as a supplement to your digital efforts. Simply

sending a letter or postcard only won't stand out, but when paired with other strategies listed here, it can add a personal touch and drive your CTA of choice. The other reason that it's such a great supplemental tactic is because we're in a primarily virtual world right now, so it can serve as a differentiator. You can also time your sales team calls with delivery to help make both strategies more effective.

8 PREMIUM CONTENT

Gating premium content like eBooks, guides, or a free offering will drive website visitors to submit forms. You want to ensure that you ask enough questions to qualify them, but not so many that they won't fill it out. That can be more challenging than it sounds.

This is a long-term, inbound marketing strategy that will help generate leads passively. Creating that special content will help build your organic site traffic over time but is also a great promotional tool to use in ads.

9 FACEBOOK ADS

Facebook Ads are popular for reaching a target audience to push premium content, seminars, and so much more. Due to the incredible amount of targeting options through Facebook, this can be a cost-effective way of getting in front of your target market, but also gathering critical information for qualifying leads.

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Facebook empowers marketers to be specific when it comes to **niche targeting and tracking progress of your conversions**. This is great for if you don't have a lot of time for prospecting and need an effective way to track your leads.

3 LINKEDIN

As a powerful social media tool, LinkedIn stands king when it comes to digital marketing for financial advisors. You can send your own solicitation to people who are similar to your top clients, and leverage many free features, like LinkedIn Pro Finder, a freelance marketplace within LinkedIn that will notify you when people are looking for services like yours.

To take it a step further, LinkedIn offers powerful paid tools like Sales Navigator, or LinkedIn-friendly artificial intelligence tools to send automated messages on your behalf. Whether you choose the free or paid route, the options and potential with this platform are powerful and effective.

4 REFERRALS

Referrals are an easy and effective way to connect with clients quickly. They don't require you to go out "hunting" as much as

getting your existing client-base to help make connections for you. The reason most advisors don't start here is that they are uncomfortable asking clients for referrals in fear of coming off as needy. We can help remove this awkwardness for advisors through a tried-and-true method called the VIPS Conversation. VIPS stands for:

- **Value-** Discuss the value that your existing client recognize.
- **Importance-** Treat everything with personal importance.
- **Permission-** Get permission to brainstorm and make it a collaborative effort.
- **Suggest-** Suggest names and categories, like a church group or community service organization.

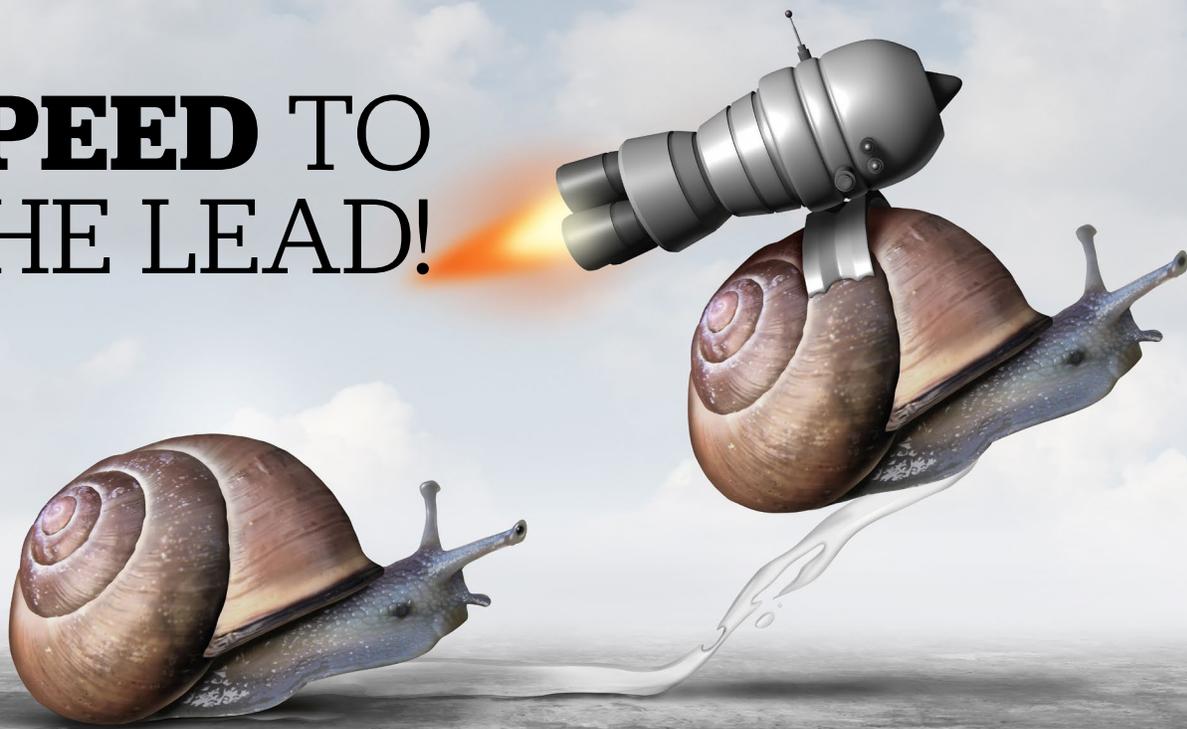
5 CENTERS OF INFLUENCE

Building out your network that isn't client-facing helps your business grow exponentially. Connecting with businesses and services that share your same target market and relationships but are not competition – like lawyers for example – can help form and grow a strong partnership that provides value to both parties.

6 VIRTUAL SEMINARS

These became increasingly popular during COVID-19 and

SPEED TO THE LEAD!



targeting and tracking progress of your conversions. This is great for if you don't have a lot of time for prospecting and need an effective way to track your leads. It's important to set these up correctly though, so we recommend watching tutorials on the right way to launch Facebook Ads and/or working with a digital marketing professional.

10 LEAD NURTURING SOFTWARE
This tip is not so much about generating leads, but is great for if you already have prospects in your database. Lead nurturing will facilitate your relationship with your clients and continue to attract them back to your business or practice. It keeps content in front of them that is relevant to their initial request/pain point and directs them back to you with a strong call-to-action to find

a solution. It's perfect for prospects who have a need but aren't ready to buy just yet.

SPEED TO LEAD

Regardless of what methodologies you choose to follow, they can be rendered entirely ineffective if you don't follow up in a timely manner, so make sure you build an appropriate follow up plan into your lead generation plan or risk your prospects turning to your competition!

Prospecting strategies for financial advisors don't have to be difficult or take up all of your time and resources. Start with this list of our top ten and let the leads come to you! Want to learn more and incorporate lead generation into your larger business strategy? Click [here](#) to schedule a call with us today!

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