

# FINANCIAL ADVISOR EXECUTIVE BRIEF

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Targeted Strategies The  
Top Firms Are Using To  
Bring On New Clients



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# INTRODUCTION

## STATE OF CLIENT ACQUISITION TODAY, A LETTER FROM THE CEO

**At some point, most companies inevitably hit a ceiling.**

Something is working for them that gets them from point A to point B but for whatever reason, they get locked up there. They don't control the pieces needed to reach that next growth phase without adding something different to their arsenal.

A major reason we see in many of the companies we speak to is that **they lack a system that gives them a necessary level of predictability within their company.** They rely on random referrals or notoriety within their market.

**The problem is neither of those things are actually controllable.** Companies that emphasize lead generation methods outside of their control are left without a reliable method where they can practically push a button to generate momentum.

It starts with controlling your lead flow and leads to greater control over the rest of the company as well.

When you manage your monthly lead flow expectations, you can make more accurate forecasts by predicting relative call show-up rates, and sales conversions, leading to more predictable revenue.

**This executive brief will address today's biggest missed opportunity for companies to gain control over their lead flow - and their expected revenue.**

But first, let's back up for a second. Remember that when it comes to client acquisition, before the internet and before being able to affordably access millions of people at your fingertips, companies really had to get creative.

Today, the landscape has changed drastically. In fact, there has never been a better time for online lead generation and client acquisition. In fact, companies now have the opposite problem:

There are a million ways to do it, but not all give the desired results - or the control they need in their sales pipeline and in their ability to forecast revenue.

Today, if you want to stand out and cut through that noise, you have the resources you need at your fingertips. However, knowing where to start - and where to focus your efforts - is key.

As a lead generation and sales development company with over 10 years experience in helping companies find reliable and cost effective client acquisition solutions, we've walked the walk and tried everything.

Our intention in this report is to cut to the chase and share how to take advantage of the biggest client acquisition opportunity we see today: social media ads.

## We'll cover:

- How today's fastest growing companies **maintain consistent lead generation using paid social media**
- How they **reduce risk and gain reliability - and control - over their pipeline** with social ads
- How too **many companies use ads the wrong way**, and the common mistake most lead generation and marketing agencies make
- **Why the LinkedIn ad platform is still a blue ocean for B2B companies** and how to justify the ad costs
- How to know **if Facebook or LinkedIn is a better starting point** (yes, Facebook is still relevant, even for B2B businesses)
- What **our best campaigns** look like and how you can duplicate them for your company
- **What to realistically expect** from a properly optimized ad funnel

It's not just about keeping the pipeline full for its own sake. And it's not just about keeping the sales team busy.

Optimizing for control gives you the capacity to plan ahead for the next quarter and the next year. It's about being able to calculate where to allocate resources in order to scale and grow - and knowing where those resources will come from.

Simply put, **the ability to control lead flow utilizing a reliable machine is the driver behind today's business growth.**

Take the lead,

Ben Kniffen, LinkedSelling CEO

*Ben Kniffen*

## QUESTION:

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HOW ARE TODAY'S  
GROWTH-FOCUSED B2B  
COMPANIES FILLING THEIR  
SALES PIPELINES WITH  
CONSISTENT OPPORTUNITIES  
WHILE REDUCING RISK?

This Financial Advisor Executive Brief answers that question by illustrating why paid social media is the best way we've seen to not only leapfrog over the competition but to claim control in your sales pipeline and lead flow, and increase sales opportunities while reducing the risks of typical client acquisition strategies.



# WHERE LINKEDSELLING FITS INTO THE EQUATION

**LinkedSelling is a team of the world's top lead generation and sales development experts** who partners with growth-focused financial advisors to increase control over their client acquisition while reducing risk.

**We are focused solely on getting your sales team enough opportunities to close high-value clients so that you hit your sales goals every single month.** Under the guidance of CEO Ben Kniffen, LinkedSelling has developed & refined the relationship-focused lead generation and sales development system that we've implemented for many financial advisors in the past.

Our clients have generated over \$1 billion dollars in new revenue from the leads attributed to our system and they've shaken up the industry.

## WHAT TO EXPECT

This report reveals tips, strategies, and important considerations from the B2B sales and marketing teams who have cracked the code on their outbound lead generation and sales development using paid social.

**The result is a well-oiled lead generation machine that allows financial advisors to turn strangers into prospects > prospects into sales appointments > and sales appointments into paying clients.**

This results in consistency and predictability in a cost effective way, all while reducing risk.

This is how you **take the lead**.



Keep reading to learn more about our proven process using paid social...



## PART 1: Who Paid Social is Best For

While there's no denying the efficacy of the method we use for paid ads, we need to set some realistic expectations. **Paid ads are best reserved for financial advisors who are clear on the following:**

- **You know your prospects** and where they are
- **You have a solid (proven-to-sell) offer**
- You have a **backend follow-up system** that converts prospects down the funnel (ie you have your sales development in place)
- You have **adequate revenue to invest** enough in order to see results
- You understand "the game" and **have a desire to scale the process** because you know it will pay huge dividends down the road

Each of these things are vital for a successful campaign. The Offer can be anything that provides value to your prospective clients - something ideally offered for FREE or at a Discount to get them in the door. This is where a free audit, a white paper, or some other educational piece provides value. We'll talk more about the offer shortly.

Most importantly, **you must be willing to invest in your company's growth.** Coming into this with a minimal budget throttles success and prolongs results. We work closely with our clients to develop budgets based on their Average Lifetime Value of new clients and their sales process and closing rates. While we're always trying to acquire new sales for our clients at the lowest possible cost, it's unrealistic to think that \$50 in ad spend or client acquisition costs will generate a client worth hundreds of thousands of dollars.



## PART 2:

# Why Most Advisors Fail With Paid Social

### 1. False Expectations

Do everything you possibly can to understand the reality of how ads work. Well-meaning agencies work with companies but too often neglect to set the expectations straight. Let's fix that right now:

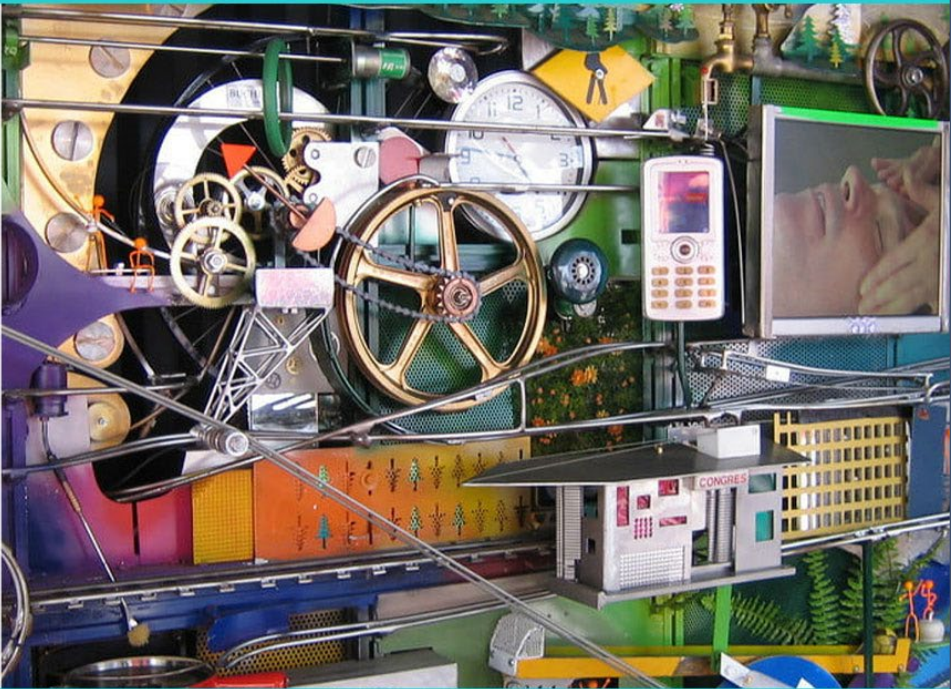
When investing in paid social as part of your client acquisition strategy, you need to **recognize the time it takes to set the system up.**

We need to be very familiar with who you are as a company, what you offer, who your client is, and then take the time to develop the ad campaigns that will best resonate with your prospects. That's just the beginning however.

Once the campaigns are launched, the testing and optimizing begins. **This is how we reduce ad costs over time. The expectation that anything will happen overnight is false.**

## 2. Too complex

Too many companies look at ads as a way to get a ton of information from their prospects, as a way to educate, and as a way to sell directly. The problem with trying to do all that at once, is that **your ad funnel will end up way too complex and your prospects will lose interest quickly.** This will only cause increased costs because your target audience won't convert at the level you want.



The **PROBLEM** with most marketing funnels is that they end up looking like **THIS:**

**COMPLICATED** →

**AND...**  
They still **DON'T CONVERT AT THE LEVEL YOU WANT**

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## 3. No backend or optimization process in place

We mentioned this earlier. What most marketing or lead generation agencies promise is traffic. And they leave it at that.

The missing part there is that **traffic is not valuable unless you have a system in place to convert those potential leads into real business opportunities.**

When you don't establish the backend funnel that drives your prospects to book appointments, you leave leads on the table. That's where marketing must overlap with lead generation and sales development.

**Equally important is the optimization process.** This takes time and multiple renditions, but it pays off because as the targeting, the messaging, and the ads become more and more in-tune with what your prospect wants, conversions are higher, and overall lead costs are lower.

## 4. Always selling

On the other hand, another big issue is that **too many companies focus too strongly on sales right out of the gate.**



When you ***"bring out the queen"*** too soon so to speak, when you've only just won the prospect's attention and immediately jump into the sales pitch, your prospect is likely to shut down. This only serves to drive your prospects away because they don't know you and they don't trust you yet.



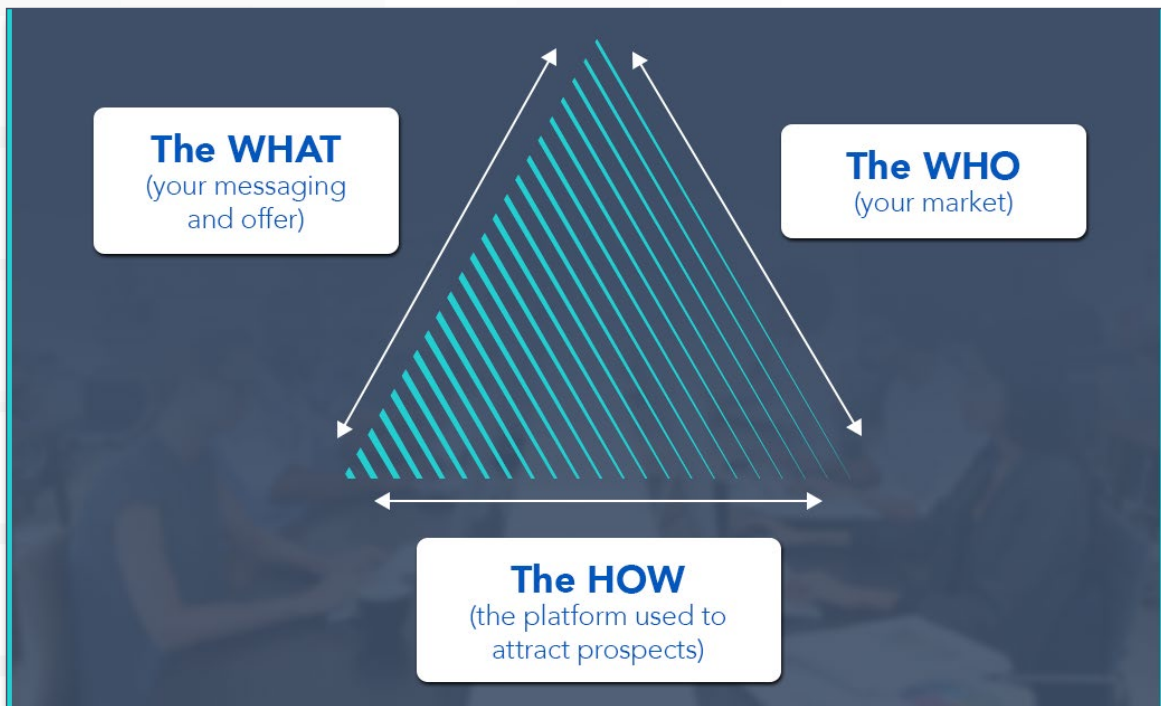


## PART 3: Successful Ad Funnels

In this next section, we'll cover exactly how we strategize, set-up, and manage successful ad campaigns and then we'll show you three of our most successful ad funnels.

### STEP 1: THE MARKETING TRIAD

The starting point for any successful ad campaign is achieving full clarity on the "Marketing Triad":



## First, Market.

You need to know who your target market is and who you're going after. Most companies will be clear on this, but there are many who don't take the time to really dive deep into understanding the psychology behind what motivates their prospects in their industry, in their job position, and more.

**You need to make sure your message gets in front of the right audience.**

## Second, Message.

You need to make sure you have the right messaging. **Dial this in your messaging and your marketing will have a greater chance of connecting with your potential prospects.**

Remember, that almost ALL of the prospects who come through your funnel HAVE NEVER HEARD OF YOU. So to think that you're going to run an ad about your company and people are just going to be begging for you to work with them is nearly impossible.

Your offer needs to be an EASY, foot in the door teaser of the value that you can provide them by working together later. **It's the job of the funnel to push prospects through and warm them up with materials - and set your sales team up for successful conversations.**

## Third, Media.

**Know where your prospects are - at every point through the buyer journey.** In this case, we're focusing on LinkedIn, and even Facebook ads. But that's just the top of the funnel, after your prospect becomes a warm lead, you will need to follow-up with email, social messaging, and even phone calling.

Your own email list and website traffic make great low hanging fruit of course. Other digital traffic sources such as PPC, page/group posts, blog posts, newsletters, and even influencer marketing are other options to add to your marketing mix.

You could spend your marketing dollars on every available medium, but this will often result in wasted money and poor return on investment (ROI). **Instead, focus on a few select channels, depending on your goals, budget, and audience.** Industry benchmarks and best practices can be helpful when planning which channels to use.

**Remember that not all marketing channels are created equal.**

**We argue for paid social media ads because of the control it gives you over the volume and type of prospects.**

# STEP 2: OPTIMIZE YOUR PAID ADS

Regardless of which channels you choose, remember that you must continually evaluate and optimize your ad campaigns in order to make sure you're achieving the best possible results. Use this as a guide to troubleshoot any issues:

## Test, Test, Test!

Again, remember that regular testing is also needed to keep your creatives fresh and your target audience engaged. Remember that one image may do well for a while but can become stale with time.

## Know Your Baselines!

Well performing lead machines should be hitting these basic baselines. Look for these numbers:

**FACEBOOK:**

- Lead Magnet Opt-ins - Less than \$20
- Goal Conversion % on Landing Page - 20%+
- Click Through Rates on Ads - 1%+
- Cost Per Appointment Booked - \$150 - \$300 each
- Goal Conversion % on Consultation Page - 10%+

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**LINKEDIN:**

- Lead Magnet Opt-ins - Less than \$100
- Goal Conversion % on Landing Page - 20%+
- Click Through Rates on Ads - 0.5%+ (LinkedIn average is 0.3%)
- Cost Per Appointment Booked - \$300 - \$500 each
- Goal Conversion % on Consultation Page - 10%+

*All baselines are estimates. When determining your client acquisition costs, we take into consideration the LTV of your clients, sales cycle and ongoing nurturing of leads.*

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## Optimize Ad Costs

The third factor to keep an eye on when it comes to using social media ads to keep your pipeline full is knowing ad costs. You want them as low as possible. This will not only give you a better ROI from campaigns (especially as you increase your final conversion rate), but it will allow you to stretch your ad budget by increasing the amount of eyeballs you can put your ads in front of.

## Low cost per opt-in = more sales opportunities and a higher ROI

Unfortunately, social media ads can become expensive quickly if you aren't careful. How do you make sure you are getting the most out of your paid social media ads?

# TIPS:

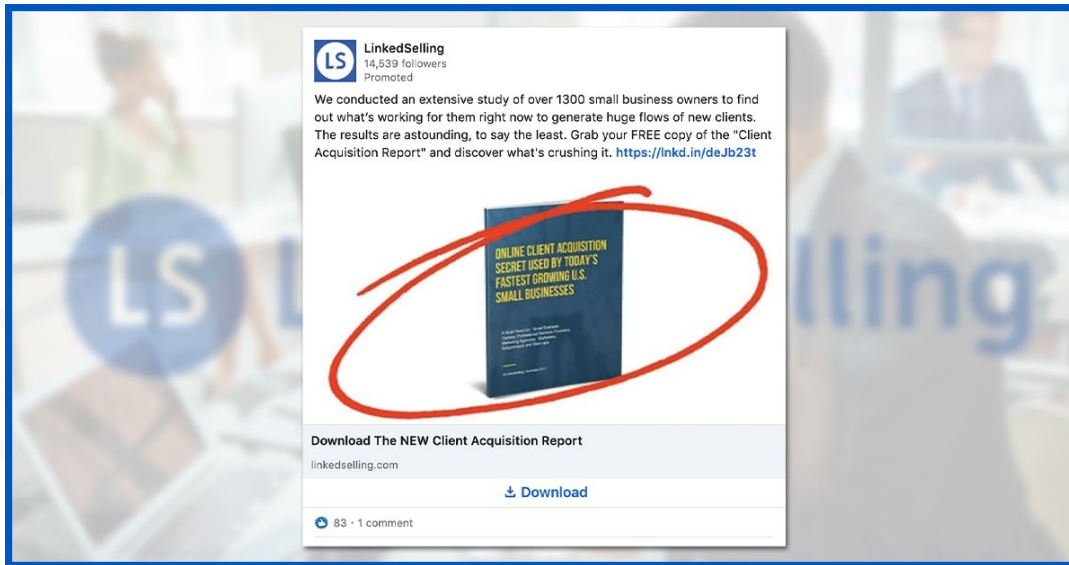
*When your audience is more responsive, your click through rates (CTR) will be higher and your cost per lead will be lower...*

- **Dial in your targeting and messaging.** To drive low opt-in costs, your targeting and messaging should be your primary focus. Your secondary metric will be to watch the Click through rates in your campaigns (the CTR) & the page conversion rate on your landing page (where the ad will take the prospect so they can access your content, or whatever you offered in your ad).
- **Develop an in-depth prospect profile.** Again, this is imperative. Really know who your prospect is. Do deep research and develop a persona that you can market to that helps drive your copy & creative mixes.
- **Niche down as much as possible.** When you try to speak to everyone, you speak to no one. Be specific so that you can call out certain pain points and outcomes relevant to the exact audience you want to target.
- **Highlight one main pain point.** Use your prospect profile to craft ads that speak directly to specific pain points your potential prospects may have. The solution will be to register for your webinar where you will help solve this pain point for them.

*Now let's take a look at what's working...*

# Top 3 Ad Campaign Formats We See Working Now:

## 1. PDF / Content download



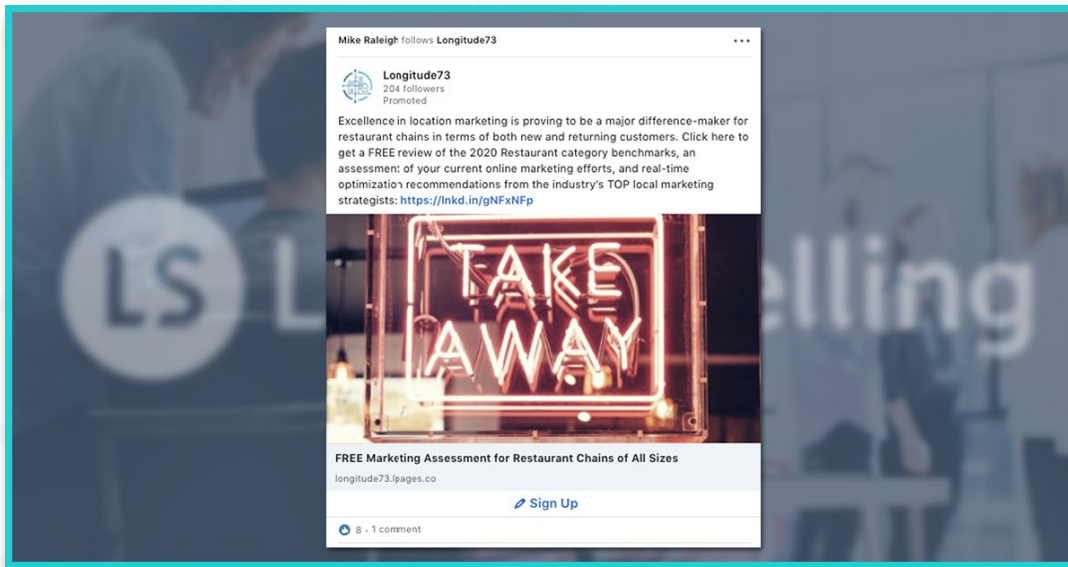
These are ads that attract your targeted audience with a pdf report, ebook, whitepaper, checklist, or other valuable download that helps solve an immediate pain.

From there, the follow up emails you send them after they opt-in to receive the download will encourage them to book an appointment. In many cases, we also have our sales development rep (SDR) team call these prospects as soon as possible after they download the pdf.

This is just one way we take advantage of both key timing and multiple channels; **we talk to prospects when they show interest** (or as soon afterwards as possible) and encourage them to make an appointment with our clients' sales calendars (or at least to take that next step in the sales cycle).



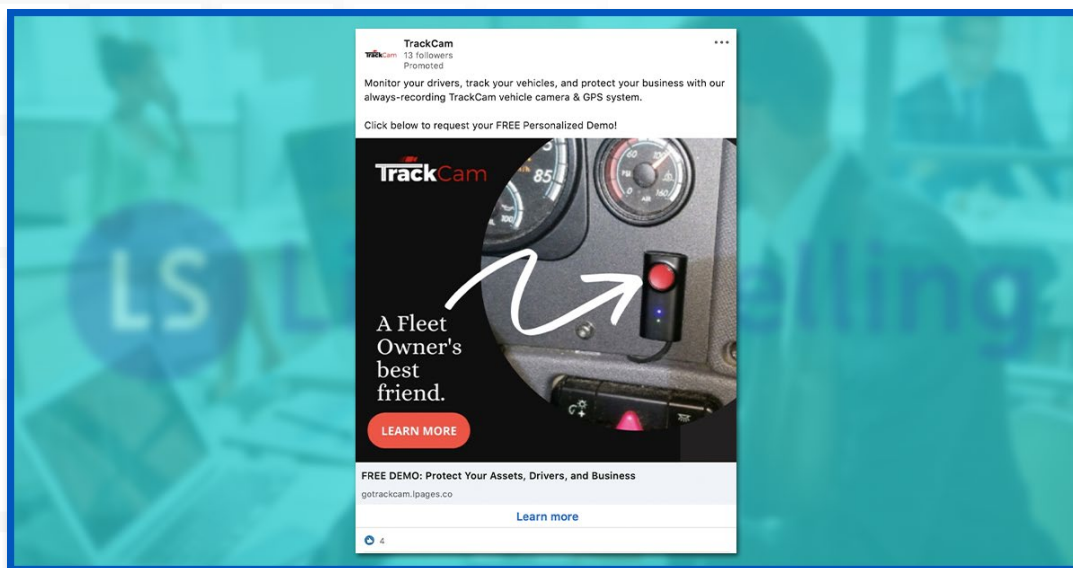
## 2. Assessment requests



Here, instead of downloading a pdf, we're offering value in a different way: an assessment. This can also take the form of something like an audit or strategy call.

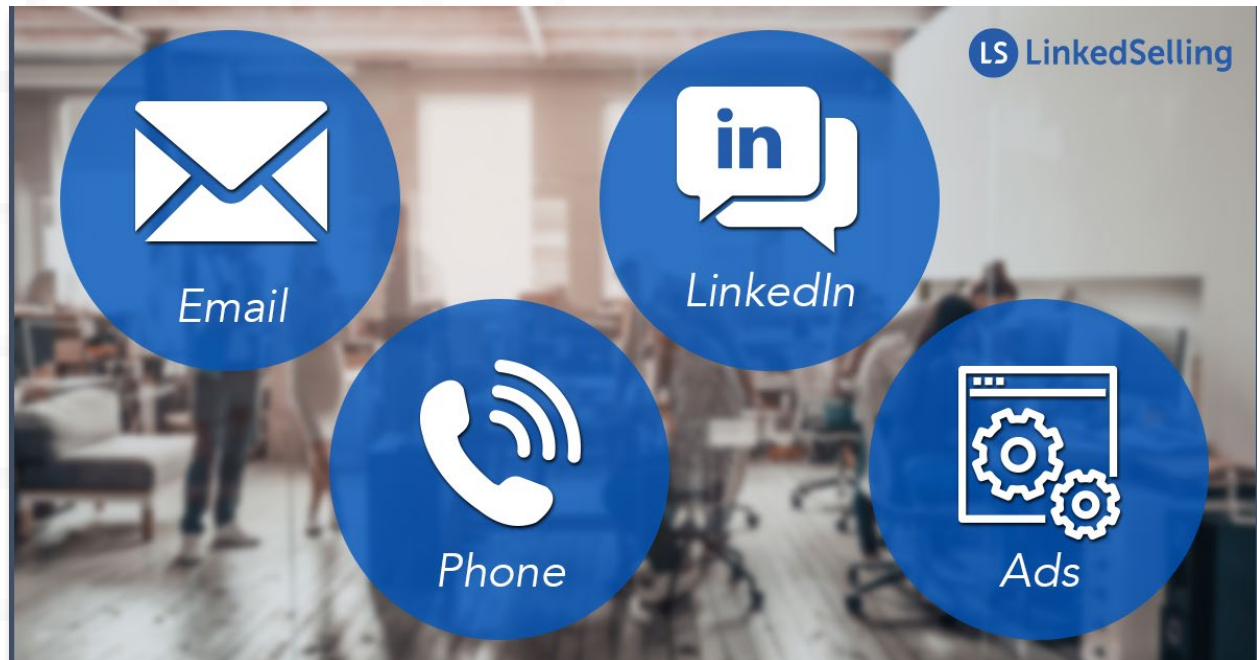
On the back end, after a prospect signs up for their assessment, similar to the pdf download campaigns, we use email and our sales development rep team to continue providing value, stay top of mind, qualify the prospect, and encourage them to take the next step.

## 3. Direct to appointment or consultation



Unlike the previous two campaigns, the ads in these campaigns encourage the prospect to book an appointment directly.

# STEP 3: INCORPORATE A MULTI-CHANNEL, BACKEND SALES DEVELOPMENT SYSTEM



Again, a huge factor in an ad's success actually has nothing to do with the ad itself, but what you do with your lead after the fact. When a company has high expectations but no backend sales development nurture system in place, good potential sales opportunities get lost.

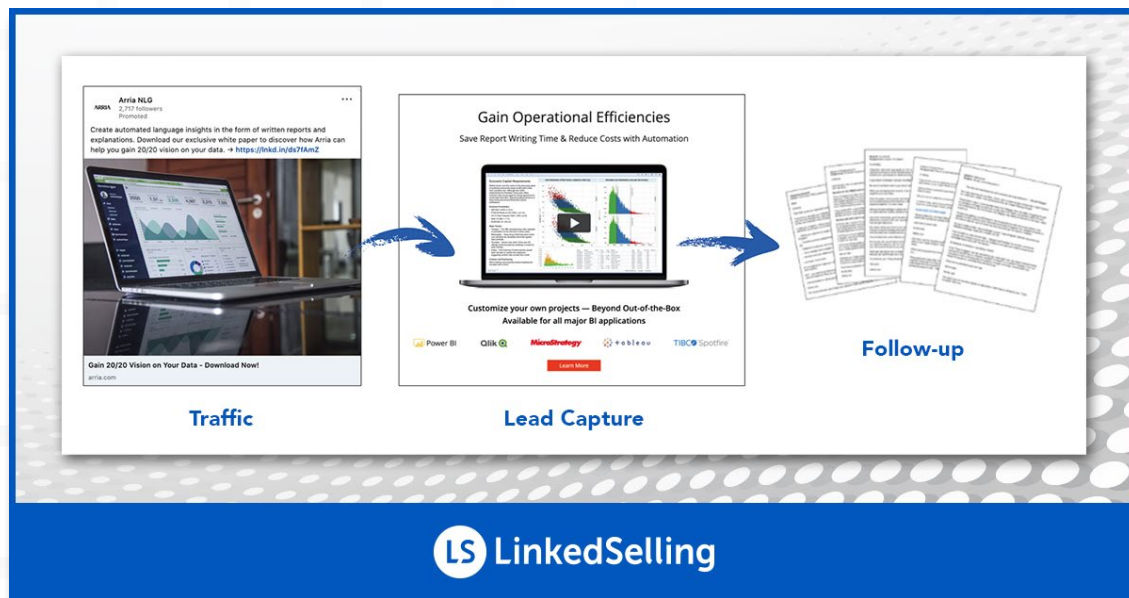
The result? The company thinks that the ads didn't work.

What didn't work was that the ads didn't sell the client on your service offering. **Ads aren't supposed to sell the offer, they're meant to sell the next step and spark interest.** A good ad campaign will catch their attention and bring the traffic, that's it. Now the onus is on the company to follow-up.

To accomplish this, at LinkedSelling, we use a multi-channel sales development system, including LinkedIn messaging, email, and phone calling.

**For example,** let's take a look at one client ad campaign. When Arria came to us, they were struggling with their current lead generation methods. They needed an easier way to reach their ideal customers in order to sell them on their natural language generation product. Previously, they had been relying on lists, trade shows and prospecting. These methods just weren't cutting it anymore. They needed more control and consistency.

**The multi-channel system we executed on behalf of that company looks like this:**



We set several 3-step LinkedIn ad campaigns that targeted prospects who would likely be interested in Arria's complex data translation software.

First, we used an inbound approach with LinkedIn ads to drive traffic to content.

Using 4 different ad copy sets that pitched a video, 2 different PDFs, a webinar, and sending a sponsored InMail message, the prospects were sent to a lead form where they entered their information. They were then redirected to a page where they could instantly view or download the piece of content they requested.

From there, we engaged in outbound methods that build on the momentum built by the inbound lead generation campaigns. **This is where the backend system comes in.**

This includes targeted email follow-ups as well as calls from our sales development reps (our SDR team) who proceeded to call anyone who opted in for any of the options with the ultimate goal of scheduling a demo.

**We've found that calling leads within 24 hours who've opted-in to content from our ads resulted in over 33% MORE appointments booked with the sales team.**

With the results Arria has seen from these various campaigns, the potential for additional revenue is huge. Thanks to the follow-up phone calls, a percentage of these qualified prospects will likely become clients over time.

The best part? This system is easily replicated month after month, and they are consistently growing their email list, and consistently booking appointments for their sales team, keeping that pipeline full and helping increase revenue.

# CASE STUDY:

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## How Financial Advisors Generate New Client Prospects Using A Simple Ads Strategy

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### *The Challenge:*

When financial advisors come to us, they have been relying on various grassroots marketing campaigns and referrals to gain clientele in the past. They would spend countless hours during the week promoting their financial advising services, and yielding little to no results. Or, they just didn't do anything to promote their firm and end up relying purely on existing clients and a referral here and there, but these tactics never actually take them to that next level of growth.

Several of them were even spending over \$250 per new prospect with other lead generation services and oftentimes, they were not a good fit for their services because they were simply leads that were purchased from a list of demographics.

They needed a way to keep their pipeline full with potential prospective clients and sign new clients every month without adding a huge marketing expense or hours of extra work.

### *The Solution:*

After analyzing each of the advisor's processes and target market, we implemented a 5-step Facebook advertising campaign with the ultimate goal of getting more prospective clients to become interested in financial advising services and building a relationship with them.

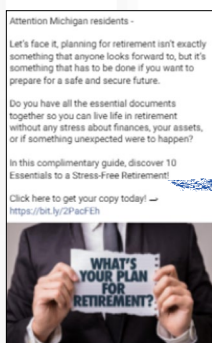
## The Campaign Consisted of 5 Parts:

1. Specific messaging that spoke to their target audience.
2. A PDF that highlights the pain points of their ideal prospects or another piece of valuable content that helps answer questions that a person may have about their financial situation (ie. retirement, investing, etc.). Prospects would enter their information in order to request the guide and that adds them to the advisor's email list.
3. A Thank You page that directed the leads to schedule a call.
4. Follow-up emails that delivered the PDF and tied back to scheduling a consultation call.
5. In some cases, we even included follow up phone calls to people who downloaded the guide and encouraged them to book a call using our proven call scripts.

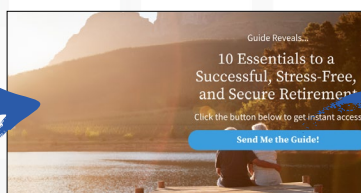
# PLUS

*our system has been generating new prospects at less than ¼ of the cost that the advisors had been spending previously!*

**Here is an example of the funnel we ran for one of these advisors...**



Facebook Ad



Landing Page



Consultation Page



Email Follow - Up

## The Results...

Since launching their Facebook ad campaigns, these advisors are adding an average of 30-60 new prospective clients to their pipeline every month and a good number of them have booked appointments along the way.

And, with hundreds of subscribers added to their email lists, the potential for additional revenue is huge. With the right follow-up sequence in place, a large percentage of these qualified prospects will likely become a client over time.

The best part? This system is EASILY replicated month after month, allowing these advisors to consistently grow their prospect list, increase awareness, and fill their calendar with appointments. Since launching these campaigns, we've worked with several other financial advisors to implement these same strategies and achieved similar success.

Choosing the right financial advisor is not an easy decision or a fast decision for people to make. It's their life savings and future at stake. Our goal with these campaigns is to **implement a proven methodology for adding new people** into an advisor's pipeline that they can start to build a relationship with, share additional valuable content and information over time, and work towards becoming a trusted advisor for these individuals by staying in touch.

**This system has been proven** in various geographic markets and demographic populations. We strive to take "prospecting" off the plates of the advisors so that each advisor can spend more time doing what they do best - working with their clients to help achieve their lifelong goals.





# IT'S A WRAP: TIME TO TAKE ACTION

## *Remember...*

That it's not enough to focus on vanity metrics.  
That it's not enough put out awareness campaigns that just drive traffic.  
That you can't jump right into a sales call.

**You MUST build trust and utilize an integrated, multi-channel approach to lead generation and sales development systems.**

Doing this aligns your sales process with the buyer journey, and results in predictability, consistency, and cost effectiveness.

**It means growth.**

**It means more revenue.**

**AND...**

**IT MEANS MORE CONTROL for your company.**

A system like this allows you to continually optimize your lead generation and sales development over time. **This is what we call the machine - where you can turn it on and see new leads coming in the door, with a pretty good idea of what results you can expect.**

Not only will you experience more cost effectiveness, but you'll also see better and better quality prospects booking appointments.

It's time to think about lead generation in a more human way. Understanding who your prospects are and what they need. When you do this, you're working with your prospects and you position yourself as a resource, not just a vendor who wants your money.

**This is how we take the lead and stand out from the competition.**

Hopefully this guide gives you some clarity on what we see as the biggest opportunity out there for companies who want more control in their client acquisition.

Hopefully we've covered the main questions you might have so that you can make a decision to move forward, resulting in:

- **Consistent sales opportunities,**
- **Booked appointments on your sales calendar,**
- **A positive ROI,**
- **And effective use of your ad spend**

# Take the lead.

However, if you still have questions about ROI, whether or not LinkedIn or Facebook ads are suitable for your company, industry and budget, or what the best strategy for your marketing funnel should be...

OR perhaps you're interested in implementing these ideas.

If either of those are the case, please **book a call with an expert on my team.**

# The Fastest Way to Execute A Solid MultiChannel, Paid Social Strategy for Financial Advisors **STARTS HERE**

Save your company valuable time and money when you cut your learning curve short and get insight into these questions from a team who's worked with hundreds of companies executing and managing social media ad campaigns - all strategically designed with ONE goal in mind:



*Consistently fill your team's sales calendar with quality sales appointments.*

If you have that goal as well, don't waste any more time. Explore your options. Book a call with our Director of Client Strategy below now.

[CLICK HERE FOR A FREE CONSULTATION NOW](#)

