The Pipeline, The Marketing Funnel, & The Prospect-Client Lifecycle

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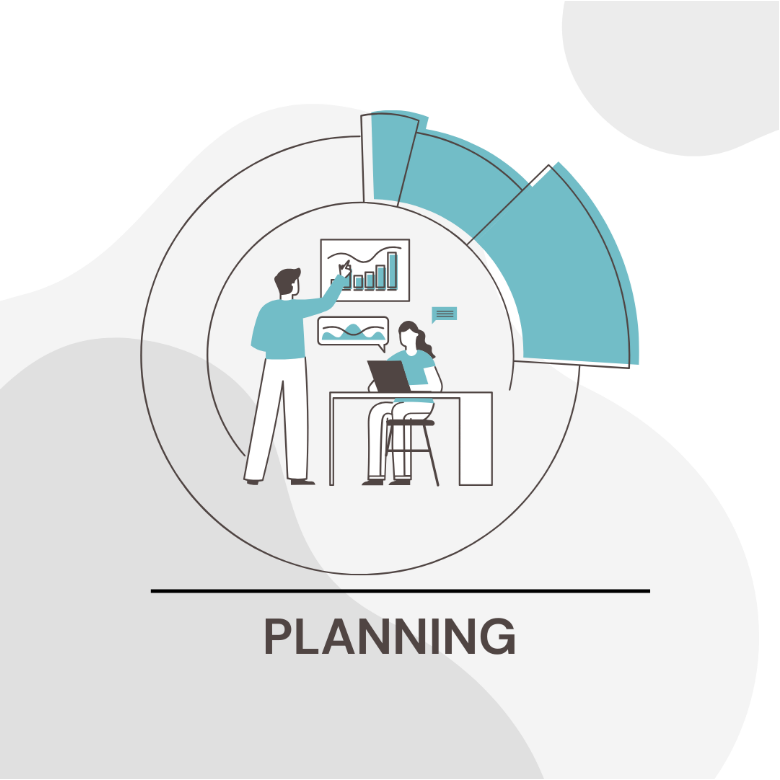
What Effective Marketing Isn't.

- Reactionary
- Random
- Run-Of-The-Mill

What Effective Marketing Is.

Purposeful



Purposeful

Purposeful

Persuasive

AUDIENCE

Persuasive

VALUE

Persuasive

Personal

So Now What, Amy?

The Marketing Funnel

The Pipeline

Questions commonly asked about pipelines:

1. Is your pipeline full?

1. How do you qualify the leads and prospects in your pipeline?

1. What are the opportunities in your pipeline?

Lead Qualifying Checklist (sample)

QUALIFYING LEADS

- [ ] How did the lead come into my pipeline and how long has he or she been there?
- [ ] When was my last communication with this lead, and what was the result?
- [ ] Does the lead engage, e.g., email clickthroughs, webinar / event attendance, social likes/comments?
- [ ] Do I know whether the lead fits my client profile?
- [ ] If I don't know, reach out to schedule a discovery call.

Prospect Qualifying Checklist (sample)

QUALIFYING PROSPECTS

- [ ] How long has he or she been a prospect?
- [ ] When was my last communication with this prospect, and what was the result? Does the prospect engage?
- [ ] Do I know whether the prospect meets my criteria to become a client?
- [ ] What is the prospect’s timeline for making a decision?
- [ ] If I have questions, schedule a call to touchbase and address prospect’s questions

Opportunity Qualifying Checklist (sample)

QUALIFYING OPPORTUNITIES

- [ ] Does my client expect a wealth event in the next 3 / 6 / 9/ 12 months? If so, what?
- [ ] Do I manage all of my client's investible assets? If not, can I increase my share of wallet?
- [ ] Does my client have parents or young-adult children who can benefit from financial planning?
- [ ] Have I communicated the value I provide?
- [ ] Beyond the annual meeting, share resources and tools that help clients extend their relationship with me.

Now
For
The
Marketing

Scenario

Strategic Goal

Grow organically to double the firm’s clients in three years.

Objective:

Through new client acquisition and client retention, reach 300 total clients by the end of 2026.

You've Done The Work

For demonstration purposes only.

Where Should You Put Your Effort?

CONVERSION STAGE MARKETING TACTICS

- ☐ A structured script or checklist for your discovery call.
- ☐ Take-away materials that meet prospects where they are.
- ☐ Books that provide education and insight.
- ☐ A clear 3-meeting experience process that is designed to move the prospect either out of your funnel or into the Loyalty stage.

Where Should You Put Your Effort?

AWARENESS STAGE MARKETING TACTICS

- [ ] Create a podcast pitch sheet and target podcasters who reach your audience. This takes consistency and time, but can fill the top of your funnel.
- [ ] Create and share relevant, client-focused content that educates about how you can help solve pain points.
- [ ] Share your knowledge with other professional groups – local bar associations, CPA associations, estate planning associations, Chambers of Commerce, Small Business Associations, etc.
- [ ] Create a social calendar and engage on LinkedIn, Facebook, Twitter.
- [ ] Network, network, network. Get business cards, use the techie ones if you like them. But make it easy for people to see your name.

Where Should You Put Your Effort?

CONSIDERATION STAGE MARKETING TACTICS

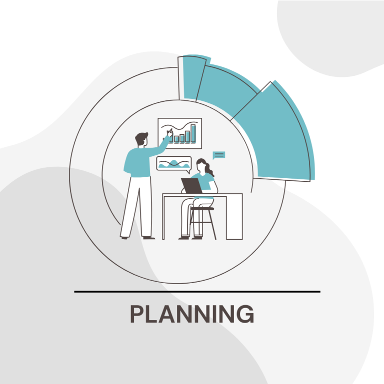
- [ ] Create gated content on your website. Offer something valuable in exchange for contact information so you can follow up.
- [ ] Create a monthly newsletter for prospects that keeps them up-to-date on the problems you solve and the content you're creating. (You always want them to come back to your website).
- [ ] If you have a newsletter, have a newsletter sign-up form on your website so people can subscribe easily.
- [ ] Co-host webinars with your COIs, where you both bring your clients together and cross-share the registration lists for follow up.
- [ ] If you are or have access to a thought leader, bring your prospects (and clients) together for an educational event.

Where Should You Put Your Effort?

LOYALTY STAGE MARKETING TACTICS

- [ ] Create deliverables that demonstrate your value.
- [ ] Create a client service calendar that engages clients through the year.
- [ ] Publish a client-specific newsletter
- [ ] Send birthday cards. (Yes, they work!)
- [ ] Make asking for referrals part of your process.

Purposeful
Persuasive
Personal




VALUE

One Last Thought

Thank you!