



HOW TO GENERATE ACTION FROM YOUR EXISTING PROSPECT DATABASE

Do you have hundreds or even thousands of leads in your database you've collected over the years from workshops, referrals, radio, or TV but they haven't become clients yet?

In an uncertain market, now is the time they need to hear from a steady voice with answers to help put their concerns at ease.

You've already spent the money to get their information, so we put some ideas together to help you reengage with your prospect list during this time.



Invite Them to a Virtual Course

With the current environment creating more questions than solutions, now is the perfect opportunity to position yourself as the educator and the “go-to” for answers. Send an email invite (provided by Impact) to your database with two or three class dates and times for them to attend a 45-minute workshop just for your practice's contacts. You can use Impact's “How to Survive a Bear Market” presentation or affiliate yourself with American Retirement Institute and teach the “Baby Boomers Basics” course.

TIPS:

1. Choose the right platform to give your course. Work with your marketing strategist to determine what makes sense for your practice.
2. Remind them of your practice. You don't know if you met your attendees last month or five years ago, and they most likely don't remember how they got on your email list. Take time to reintroduce your practice, who you are, and why you're providing this content to them.
3. Expand your invite outside of email. There are technologies available to help you create efficient processes like recording a message once that can be delivered to all voicemail inboxes at once.
4. Review Impact's guide “Holding an Online ARI Course” for tips and steps for holding your online course correctly.



Invite Them to a Virtual “Coffee Talk”

This virtual event is different from an online course because it's less of a presentation and more of a discussion. Ask prospects to submit their most pressing questions ahead of the coffee talk to create your discussion points. As you facilitate the event, encourage participants to submit questions “real-time” so you can answer and create a strong engagement with your viewers.

Since this is more of a casual discussion, set up your room to create that environment. Try sitting in a comfortable chair in your reception area or house. Don't forget to test the shot to make sure your camera positioning and lighting are correct.

Since it's a “coffee talk,” host these in the morning (don't forget your cup of coffee!), as participants have more time on their hands to engage with you at different parts of the day.

Creating consistency is always key to building a following, and with how rapid our environment changes these days, it's a good idea to get on a schedule. Maybe try every Friday morning at 9. The more consistency you create, the more opportunities you have to engage and also encourage referrals.



Drip Content on Them

Keeping your brand in front of your prospects is an important marketing strategy for any business in any environment. But how do you keep your brand top of mind when every other business is also fighting for their attention right now and there's an overload of content on every medium?

Email and social media are two very powerful marketing tools to keep your brand in front of your prospects, but it's how you use it that will help set you apart.

TIPS:

1. For email, try using a video platform like BombBomb.com to send video emails instead of written emails. This will help you deliver your message in a more impactful way and help your emails stand out.
2. Keep your message short, sweet, and to the point. We're overloaded with constant news and updates, so our attention spans are shorter. Make sure your message is succinct and has a clear solution for your viewers/readers with directions on next steps. Keep videos under five minutes if possible and always make sure to test your shot and lighting.
3. Don't run the same content every time. Try to provide new tips or choose a different focus each week you send these out. Don't be afraid to step outside of the financial world and connect with them in other areas.
4. Add a tangible download. Go one step further and provide them with a whitepaper for further reading and content.



Send Mail

With most marketing efforts turning to digital mediums right now, this might open up the opportunity for you to strike in direct mail. Instead of engaging them to an event, use this opportunity to let them know you're thinking of them during this time.

One advisor had extra chocolate bars branded with their logo on hand and sent one and a note to everyone in their database. A special surprise in the mail paired with a message to let them know "you're here for them" helps you stand out from the competition.

Happen to have their birthday, too? Send something extra to help them celebrate during this difficult time. This could be flowers, a game to keep them entertained, or a gift card to order dinner delivered!*

TIP: Include a note that all items were sanitized prior to sending to calm nerves.

*Please make sure to check your specific gifting laws in your state.



Virtual Appointments

No matter the medium of communication, remember to let all prospects know you're facilitating virtual appointments during this time. This will immediately put their mind at ease and help them keep an open mind to engage with you.

Give them an overview of what the virtual appointment will entail and how easy it is for them to join. Make sure to provide specific instructions on how they can request a virtual appointment. Do you have an online booking calendar they can use? Should they send you an email or call your office? Whatever path you want them to follow, make sure you're clear in your directions.

