

SIMPLE STEPS TO IMPROVE

Appointment Setting and Client Conversion



If you are an advisor prospecting for new clients, you understand how challenging it can be to set appointments from your events and lead programs. You want these prospects to hire you and become clients for life, but getting them to show up to the appointment is half the battle. Most advisors follow up with potential clients in similar, predictable ways. Very few may completely understand the prospect's behavior and how to tailor their messaging and follow-up process to maximize success. Below are some ideas and practical strategies that successful advisors we work with use when prospecting for new clients.

BRANDING

Your brand and marketing pieces – or lack thereof – can either help you or hurt you. What happens when potential clients try to find you online? Do they discover a website with messaging consistent with the marketing they received? Does your website elevate your credibility? This is a critical component to your appearance as an advisor and a company. Your brand and overall marketing strategy need to reflect who you work with and what you do for your clients.

THE PROCESS

When it comes to converting leads to clients, it is essential to develop a multi-channel follow up process via phone call, email and **text messaging** to confirm appointments. Prospects can easily ignore an email or a phone number that they don't recognize. A text message is something they are likely to click on as it shows up on their device dashboard. There are also “no ring-direct to voicemail” services that may be useful.

ACCOUNTABILITY

Once the appointment is set, it is important to establish a commitment from the prospect. This can be done with language like: “We have a very busy practice. Please add this appointment to your calendar. In the event you can’t make it, please notify us as soon as possible so we can accommodate other clients.”

AGENDA

Once you connect with the prospect, be very clear on how much time the appointment or call will take, what the objective is and what will be covered. This will help to remove some of the initial apprehension that is common with lead prospects. Also, let them know you don’t work with everyone. You can say something like: “We only work with clients who are a fit and can benefit from our experience and expertise. If, for some reason, we aren’t able to improve your situation we will let you know.”

PAIN POINTS

In this preliminary meeting, you need to find out their financial fears. They may be somewhat general in their first answers, but it’s important to get an emotional response here. It’s important to find out their relationship to money and investments. For example, they may be worried about another 2008 market crash. Try and urge them to talk about a past

experience and how it made them feel. You could ask: “Could you handle it if it happened again?” or “Would you have less stress if we could remove that concern from your plan?” Always ask thought-provoking questions. The best questions lead to an emotional response.

CONVERSION

Even the best advisors only convert approximately 10%-20% of their leads. That leaves the vast majority of those leads available for reengagement, making them far more valuable than any other cold lead. You need to develop a consistent, nurturing strategy with a specific call to action to get and keep their attention. Remember, they have already raised their hand once, they may still be interested.

If you need help in any
of these areas contact
The Quantum Group at:

800.440.1088

DISCOVER THE POSSIBILITIES | THEQUANTUM.COM | 800.440.1088

FOR FINANCIAL PROFESSIONAL USE ONLY-NOT FOR USE WITH THE PUBLIC

THE QUANTUM GROUP, USA, LLC, AN ARIZONA LIMITED LIABILITY COMPANY. IN CA, D/B/A QUANTUM DISTRIBUTION & INSURANCE SERVICES.