

WHAT IS THE PATH THAT A PROSPECTIVE INVESTMENT/PLANNING

CLIENT ACTUALLY TAKES?



EXPOSURE

In some way or another, you have come across Joe Prospect's radar. This could be through referral, social media, email, or even an ad. Here is where his journey begins.



WEB SEARCH

Now that Joe's interest is piqued, he is going to do what 55% of other consumers do these days and look you up online. Will you and/or your firm come up easily when he searches for you?



VISIT THE WEBSITE

If you're staying on top of SEO, we hope that your prospect will find your firm's webpage pretty easily and can visit that to learn more. If not, they should be able to follow a link from your social pages directly to the firm's site. If your prospect has made it here, this is already a win. Ideally, your site will also be designed to capture leads so you can nurture your leads as they move further through the process. In fact, this is how you keep them moving toward that final destination.



VIEW SOCIAL MEDIA PROFILES

Whether the prospect visits the website or social media pages first will depend entirely on whether your prospect searches for you directly or for the firm. If you are being referred, chances are it will be your name that is searched first and the website visited second.



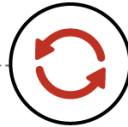
READ BLOG ARTICLES

Blog articles are a great way to showcase your expertise, special offerings, and much more. Make sure your article reflects the type of work you do to attract the right type of client.



SIGN UP FOR EMAIL NEWSLETTER

Research has shown that each blog article should have an option at the end of the page to sign up for the email newsletter. It makes sense, after all. If a prospect is already reading your articles, it means they are interested in what you have to say. Strike while the iron is hot and offer them the same great content directly to their inbox!



CHECK FOR SOCIAL MEDIA UPDATES

If your prospect becomes interested in you enough, they'll likely follow you on one or more social platforms. It's your job to make sure you stay top of mind by updating these regularly.



ATTEND A WEBINAR OR LISTEN TO YOUR PODCAST

More and more these virtual modes of prospecting are taking over. The pandemic has certainly done much to escalate these trends, and they don't show signs of slowing down.



DOWNLOAD A GUIDE

You can offer your guides on cmedia and your website to maximize the number of potential downloads. Keep your prospect exposed to these opportunities to collect their information.



SCHEDULE AN APPOINTMENT

You never really know where in the journey someone is going to be ready to take this final step. It could be after a few interactions; it could be after twenty. It could take an entire year of following you for Joe Prospect to finally reach out. This is why you always need to have the Call to Action (CTA) to schedule an appointment readily available on the site, in your email campaigns, at the end of your webinars and podcasts, and on your social media platforms.