

Kristin Harad: Welcome to How to Create Your 30-Day Lead Machine.

Hi, I'm Kristin Harad, certified financial planner, marketing trainer, speaker, and coach, and creator of the Complete Relationship Marketing Blueprint and the Implement Now! Practice Management Summit.

Today, I'm going to teach you the 9 steps to build your own 30-day lead machine, a machine you can create to jolt your practice right now to get momentum and then to use it again and again as part of your long-term lead generation efforts. I put together a three-session virtual workshop series to help you in the short-term, the next 30 days, and over the long-term, the next year or the next two years to achieve your marketing rhythm so you can continue to attract paying clients over time. Watch your email for the next two workshop videos. They're going to be the same format, free virtual workshops for you to watch and they'll come to your inbox across the next week.

If you've met me before, you know I'm extremely passionate about helping independent financial advisors like you thrive and succeed in creating the practice and the lifestyle you desire. I transitioned out of corporate America where I worked in marketing for 14 years. When I left, I started in the financial advisor industry in 2006. I launched my own financial planning firm completely from scratch. You see, I craved the lifestyle of an entrepreneur and I wanted to help people. I wanted to help new parents. I grew my firm from zero to a meaningful six figures in revenue in less than three years.

What I loved most is that I became an entrepreneur. I made a choice about the life I wanted and I made it happen, and it has become more than a professional achievement. It's my lifestyle. I want that for you. You see, my driving reason why, my mission, the reason I do the work that I do is to eliminate financial anxiety so people feel free to pursue the life they want to live, not the one they feel they have to live. Freedom is my number one value; freedom for me, for my family, for you, for your clients, for everyone in the world. Yes, this is big, but I know what it's like to struggle with the anxiety, to feel trapped, to feel that you don't have a choice and you're stuck.

I've battled anxiety and overcome it in my life with a lot of work and a lot of effort. I felt the greatest freedom when I built my own business and began impacting others with my skills. What you see here is that entrepreneurial lifestyle, that creating and crafting exactly what you want. When I show the vacation pictures of my son, Danny, and my daughter, Parker, or going up to Napa with my husband, Mitchel, it's all about creating that lifestyle that allows you to do what it is you want to do and to be free, to feel free. That's one reason we live here in San Francisco. You can see the Golden Gate Bridge here and the

San Francisco Bay. We live walking distance from the bay. Why? Because we love the entrepreneurial spirit that San Francisco offers.

We love being near the ocean. I look at the ocean and I see possibility, I see endless options. It's exciting for us. What's really exciting for me is that I feel that right now, I'm now going back to my roots. I'm taking the sum of all of my experiences and everything I've done over the last 20 years and said, "Where are my greatest strengths?" Right now, standing in the spot, when I teach and train you from my areas of expertise particularly my success in lead generation and relationship marketing, building loyalty, creating brands, I have the opportunity to affect a whole lot more people. Because when I teach and train you and you learn how to build a thriving practice or to take your practice that you've created to that next level, you can have a bigger impact on your clients.

You're going to attract in more people and be able to enrich their lives and have a positive impact on them. You're going to be able to connect with them and share your greatest strengths and helping them create the life that they want to live. You can see that when I use my skills to teach you and you're using your skills to help others, we are all able to have a far greater impact than any single action one of us can take. This is really powerful to me and this is my driving why and what makes me so excited to be in a position here today where I'm able to teach and train you from my experience.

Now, let's take a look at how you can expand the number of clients that you help. We all know it can be challenging to attract in new clients. Let's face it. You could have the most beautiful website, the most compelling financial planning software, a decked out office space, fancy technology setup to deliver your plans of rebalance portfolios, but none of that is going to help you if you don't have clients. You may be in a position where you really truly need clients and you need them now. You needed them yesterday. We all know you can't really stay in business too long without clients. If you do, you're certainly spending through your savings or building up unwanted debts.

You may be listening and saying, "I really do need clients. I'm not kidding. I'm either getting off launching my firm and I have a certain amount of money in the bank that can sustain me while I get my clients," or maybe you've been hobbling along for two, three, four years, maybe even longer. You're like, "I really need to get more clients in the door and I've never really had a process for that." It's a bit more of a scary spot to be in but it's your challenge. Now, maybe you

already do have clients and maybe you even have a good number of clients, but you know, you know feel it, deep down you know that you have more in you and you want more.

You know you have greater potential to create a bigger impact on more people's lives. You just can't seem to get past a plateau that you've been traveling on. How is that you can break through and attract in even more clients you want? This is your challenge. Now, you may be thinking, "How do I get the people I like to act now?" I bring out the word "I like" because we don't want you bringing in just any old client. We want you bringing in people who are going to help you thrive, that you're going to feel so excited and good about having in your practice.

Now, if you're coming from that need space, you may say, "I don't care. I just need some clients who will pay me." Let's do this in a way that's going to bring in people that you like. The goal of our workshop today is to get them to act now, so there's an urgency to getting people in the door. How do we do that?

First, wave your flag, build awareness. You have to build awareness that you exist. Then you have to give something that will generate interest, that people will look at, and then you have to inspire action. This doesn't happen as fast as we wanted to or even as we needed to most of the time. Frankly, if you're not proactive about getting out in the world as I'm going to show you in workshops 2 and 3, we're going to talk about continuing to be proactive over time with consistent efforts rather than this intense 30-day lead machine, you may actually end up like this guy. He's been sitting and waiting and waiting for leads for a long time. Too long.

Unfortunately, no, we can't just push the "boost" button and getting a few infusion of new leads. It'd be so wonderful if it was that simple, but it's not, but you can do something. You can build your 30-day lead machine, and after your build this machine once, you can use it again and again either when you need a boost in your practice or more strategically, you look out over the next year or the next two years and figure out when it makes sense to incorporate the lead machine into your overall marketing plan.

Now, importantly, this is not a magic potion. It's absolutely not. Building your machine takes effort. It actually takes a lot of effort. In fact, it can get really maddening. You can get really upset when you look at the time invested to get it

off the ground. It reminds me of the first time I wrote a financial plan before I had any templates or spreadsheets built or software to help, my first foray into creating that client deliverable. Honest to God, I think I could have earned more per hour working at Starbucks. After I got the hang of it and more tools to support me, I saw a bigger and bigger efficiency and time saved which meant I could focus on getting more people in, which mean ultimately more dollars in my pocket. I think you know what I'm talking about, but the same concept applies here.

When I say 30-day lead machine, what do I mean? Financial planning, as you know, is an information-based business. As advisors, we have to educate people, not only about all of the intricacies of personal finance, but sometimes we just have to talk through basics of why it's beneficial to work with a planner or how the whole process works. One of the best ways to leverage your time and educate your potential clients is to hold a webinar or a teleseminar to host your own virtual event. Now, before you run for the door and think, "Oh no, no way. I'm getting out here," I want to talk to you about the benefits of this. Go with me on this because it's actually really exciting, the concept of hosting these virtual events, much like the one you're on today with me.

What are the benefits? First and foremost, when you hold an event, whether it's a webinar or a teleseminar, and that's simply the mode through which you're delivering it, you're going to reinforce your expert positioning. You're essentially saying, "I have something important to talk about and I'm going to share it with you." They're inexpensive. Sure, you can do an in-person event. Those are extremely effective when done well but the good news about a virtual event is that it's a fraction of the cost. It's really mostly time invested though there could be some small expense-related, but it's inexpensive.

It's a short lead time. We can get this up and running in 30 days. You can even do it faster, but for the workshop content, I think 30 days is a reasonable lead time to get yourself going without going completely crazy trying to hit the deadline. There's a short lead time. You can decide I'm going to host a virtual event and get out there, promote it, get sign-ups, and make it happen within a very short period of time. It's easy to setup. You just need to be able to speak into your phone and hit record or present a webinar and hit the big red record button. It may sound hard, but when you look at all the tools available and the software

available or just calling on your phone to a service that records you, it's super easy to setup.

Virtual events are repeatable. Again, this gets down to you build it once. Once you create your process for what is the content I'm presenting, how am I going to present it? What are the emails I send out? How do I get the word out about it? It's repeatable. You package it up. You say, "Okay, now it's time for me to do another event. I'm going to go back through and follow my manual." In fact, if you document it well, you can hand it off to someone else to do most of the work for you and you go in and do the presentation. You can leverage your effort because you create an asset. Every time you hold an event and record it, you create an asset. You create a marketing asset, something you can use again and again.

It's very exciting. You record what you do and you can break it up, break it down, use it again, use it in a different format. It's exciting. This piece about it being repeatable, again, it's going to take work to set it up. It's going to take work to get it off the ground. It may be frustrating but I ask you to please trust me on this and forage through because it's really going to help you because you're leveraging a one-time effort upfront to get setup and you can create an asset, an asset that you can use and transform into a lead generation vehicle, a lead capture vehicle like an ebook or an audio file or a video training. There's a lot you can do with this content once you create it.

Let's take a look at the 9 steps to build your own lead machine. Are you ready to go? Let's do it.

Okay, the 9 steps to create your own 30-day lead machine starts with step number one: commit. Now, here's my office chair. This is the chair I sit in everyday and I sat in it when I had my financial planning practice and I do the same thing now. When I want to hold an event, I first commit and say, "Okay, I'm going to do it," and I swivel my chair and I look at my calendar. I always have a calendar on the side wall. I look and I say, "What makes sense given the other things going on? When will I be hosting this and how fast can I get it done?" I want you to take a look at the calendar and say, "Okay, if today were the 16th," and I looked ahead, I could say, "All right, 30 days from now, it will be the 15th." Put the date on the calendar. This is what you need to do. You need to pick a date, put it on a calendar, and see it. You need to visually make it so. Commit right now upfront that you are holding this event.

Step number two is craft. You need to craft your event. Every single marketing effort you do begins with crafting objectives. For this type of virtual event, there are two objectives. The first is build your list. When you're promoting the seminar, you will build your list with leads in your ideal target audience and you will get the word out among the people who you'd like to attract it. This is one of the objectives. The second objective is to drive an action. When you hold a seminar like this, a webinar, or a teleseminar that is structured to bring in more clients, to give that jolt to your practice, so it's not part of your ongoing educational work, it's about the jolt, you have to drive the listener to a revenue generating action. This is going to be your offer.

It's critical that for this particular type of event where you're looking for the jolt in business that you drive a revenue-generating actions. What are some examples of that? Your call to action may be to schedule a 30-minute free advice phone call. That's what your objective is. You're going to measure the event by how many people scheduled 30-minute free advice phone calls. You might have them enroll in a three-week workshop series you're doing. I know some advisers out there want to do either in-person workshops or online workshops, similar to what I'm doing here where they have week over week participants, and perhaps you package that up and sell it or you're using it as a way into your system.

Or you invite them to come in for a complementary social security review, but you want the step to be the next in the effort. You don't want them just signing up for your free ebook. Because we have them in this particular objective when you're crafting the objective for this type of webinar, you want the next step that will help them get to the revenue generating action. We have to have this offer. What is the next action you want someone to take as a result of participating in your seminar? Absolutely important. Once you do that, then you can build out the rest of the seminar to drive to this action. That's what's critical. It's what differentiates the lead machine seminar from just ongoing podcast, blog post, webinars that you hold to educate and build relationship and build trust. Those have a different role and we'll get into those in videos 2 and videos 3 when we talk about a longer term marketing plan.

Okay, step number three: Compose. Now, compose is all about putting a title on your event because what's interesting about these events is you need marketing copy points to start promoting, but you don't actually have to be ready yet with anything more than a title. Perhaps you create something that says "Four Proven Ways to Save 500 More Per Month" or "This Wasn't the Plan: How to Clean Up

Your Financial Mess and Prepare for Retirement with Confidence," "How to Ditch Your Budget Without the Guilt," "What Everyone Ought to Know about Their Credit Score," "Who Else Wants A Fulfilling Retirement and Financial Confidence?"

These are sample titles of webinars that you could do, and I've shown these particularly because they all use different formats. You can see the "Four Proven Ways to Do ..." what? Say, "\$500 More Per Month." That's a very clear one. That's saying X ways to do Y and get Z. That's a very common structure. Then just the basic how-to: "How to Ditch Your Budget without the Guilt?" It's very tactical and that you talk about the budget but then you tap into the emotion with the guilt. When you ask the question, "Who Else Wants a Fulfilling Retirement and Financial Confidence?" that's a little bit more out of the box, but it's talking about, "Hey, be part of the group." Of course, you want to be this. You want a fulfilling retirement. You want to feel that confidence.

Then there's the structure of "What Everyone Ought to Know," so the idea of you should know these things or you're going to be in trouble. Of course, you would know them ... about their credit score. That credit score may be something interesting to your target audience. The point here is to pull the topic in that's relevant to your target audience, the people you want to attract in. Then "This Wasn't the Plan: How to Clean Up Your Financial Mess and Prepare for Retirement with Confidence." You start with a negative and end with a positive. These are just common structures of titles that you can use and title your event. You can title your event before you've ever crafted out the content.

Then the next thing you need is just a few points to talk about the event. If you went with "What Everyone Ought to Know about Their Credit Score," you want to outline three bullet points of what they're going to learn from your session. These are like the learning objectives. "In this information session, you'll learn, one, the three most impactful factors and how to increase your score within 60 days; two, when it's okay to check your credit and when you want to avoid it." Again, this idea of giving a structure of three of something within a time frame.

Or "It's okay to do this, but you better avoid that" and then "When you should stop paying to protect your credit and what to do next," so somewhat of an alarming statement. Then end with something positive: "Plus, you'll also learn how much you'll save as your score moves up for mortgages, credit cards, and auto loans. You'll be surprised with these numbers." You're setting an

expectation. You're making them anticipate the event. You're doing some negative, some positive, and you're ending on an upbeat. Very important.

Step number four: Choose. Now, this one could seem very simple and it can be, so don't get in your own way. Choose what kind of event you're going to hold. Choose your technology platform. What are you going to do? Are you going to do a teleseminar or you're going to do a webinar? If you're going to do a webinar, you can look at something like GoToWebinar, AnyMeeting, Join.Me, ClickWebinar. You can do a Google Hangout and record it and have a video of you talking and you can do it that way. It all depends on what it is you want to do for your event. If you just want to start easy, just do a teleseminar and that simply means that you record yourself talking and there's no visual presentation. There's nothing on the screen.

A webinar means you have to have something for the screen, whether you record video or do a PowerPoint or a Prezi like I'm using today. You want to have slides, if you will, or content that you share. You can use Instant Teleseminar or TalkShoe or even GoToMeeting. You can record any meeting you can record, any of those you can record an audio, and you get a file and then you have a link and you can share it after you're done. You invite people in to register and all these platforms can handle registration and from there, you create your event and send out your invitation. First things first, you have to decide which carrier you're going to use. You do need to choose.

Step number five is campaign. Campaign is all about promoting your event and inviting people to register for the virtual event in advance. We want people to have to sign up in advance on your provider that you setup in step number four so that you can capture their name and email address, build your list, and then follow-up with them. Campaigning is about getting the word out, and that comes in many forms. You can record a video and put it out on a YouTube channel, you can send email, you can send text, you can send letters if you want. I wouldn't necessarily recommend that for a virtual event.

You just get the word out across multiple platforms. You're going to share the news across social media, not just your own social media, but you're also going to ask people who are in your target audience, whether they're friends or colleagues or current clients to announce your event with the link and endorsement. You reach out to people who you know are fitting the target

audience who would be willing to help you and you say, "I'm having an event. Will you please help me?"

You want to enlist your current clients to spread the word as well. Send them a special invitation and let them know that you're hosting this event and that they may be familiar with the content since they are clients but you can invite them to come for a refresher or for reinforcement of their plan, but what you really want them to do is to invite their friends. You have a call to action for them in an email that you've sent to them when you reach out. You say, "If you have any friends or family who may find this seminar valuable, please send them this link. I appreciate your help." You want to enlist your advocates who are already there and they understand the value that you bring.

You also want to engage your prospects. These are the people on your list that you already have who are not yet clients, who have joined your list either through a lead capture magnet or freemium you have on your website, through your blog list. They've met with you in the past but haven't converted into a client. They've attended an event of yours in the past. However it is that they made their way on to your prospect list, you want to reach out to them and invite them. These people are going to get a series of emails from you where you're going to invite them in. You don't just email them one time. You want to email them three times. You want to have three different emails that recruits people, tells them about the benefits of the webinar, or the teleseminar, and how to register.

You also want to enlist the help of your partners, of your colleagues. These are your centers of influence. These are people with whom you professionally collaborate. When you have very clearly defined partnerships, you can reach out and say, "I'm holding this event. Can you help me?" People will and you offer in return to help them. This is essentially finding anyone who has the same audience you're trying to attract and asking them to help you.

In fact, it's so important to campaign, you can just hop on your bike and drive around and let people know about your event. I'm being somewhat facetious here but the point being don't overlook any channel to get the word out about your event because this is a very short type promotion period where you're generating interest, you're getting people to sign up and attend the event. You have to speak with them and you have to talk with them frequently to get them

there. Just do whatever you can to get people talking about the event and showing up for the event.

Step six is you actually have to complete the content for the teleseminar or the webinar or the event that you're holding. We've had a title, we've named the learning objectives, now we need to complete the presentation that you will give for the day of the event. Your presentation needs to accomplish three things: One, you need to connect with the audience. Right away, I want you to share what is your why? Why do you do what you do? Why is it important to you? Connect with the audience. I always share that and I love it when I hear it from someone else because I want to know what drives them everyday. Why do they get up and do what they do?

Show that you understand their concerns, their fears, what keeps them up at night. You understand their aspirations. You want to connect on an emotional level early on in your presentation. Next, you have to, have to 100% must educate. Educate, educate. This, yes, you're going to ask someone to take an action. You're going to ask them to follow through and come in for a consultation or to sign up for a workshop. You're going to ask them to take an action, but first, you need to educate and you need to educate on the topic as promised in your write up. You go through and you say, "Okay, I promised the five ways to do Z, Y, and Z," you outline the five ways. You talk in detail.

The most important thing is number three which is give. Give, give, give. Share more detail, share more how-to information than you think you should. I hear this all the time from people. They say, "I don't want to give away too much or someone won't hire me." No, you teach it as if they had to go and do it themselves. Tell them what they need to know. When you do that, you set yourself up well because you've built trust, you've delivered what's in their best interest, and you're ready to move to the next step.

Step number seven is conduct. This is when you hold the actual event. When you host your event, ideally you'll have numerous participants on the line or on the webinar ready to listen in, but no matter how many people show up, you want to act as if it is a full room of people. Granted it's a virtual room, but you're going to present in the same manner that you would if you are presenting to a large group of people. Ultimately, any one listener could be the ideal client you want. If you fear that no one is going to show up, don't worry. If you've had more than a few people register after promoting the vent significantly, there's definitely an

interest. The show up rate is going to vary and you just have to plan to move ahead as scheduled. You can record the session, turn it into another packaged content offer, and leverage the time and energy you spent creating the session.

Immediately following the event, you're going to send the recording out to the people who registered. Don't get stuck on how many people show up because you're going to conduct the event no matter what and when you're conducting the event, it's really important you realize that you're driving to your offer so the offer is that call to action that you've set up. What is it that is available to them only because they participated on this call? You're going to mention this offer not once, not twice, but three times on the call, because you want to maximize that time on call by the participants. If you mention it that many times, they know there's value at the end and they're more likely to stay on the line.

You're going to build the anticipation about the offer and ultimately increase your conversion rate. When do you ask? You mention it first during your setup. You're going to say, "Today is full of valuable information, you won't want to miss a minute." Tell the audience right away that you're going to have a special offer at the end that they're not going to want to miss, but for right now you want to dive in to educate them on topic at hand. About halfway through the content, you're going to have mention number two. You're going to mention quickly that there'll be an offer at the end that they're definitely going to want to hear. You can hint at what it is or even quickly state what it's going to be about or related to. You just want to weave that into your content.

Then in the last five to eight minutes, you'll make your offer. Again, the piece at the end where you make the call to action, you want to make sure you're not rushing through it at the end, but you also want to make sure that it's only taking up about 15% or 20% of the content because the majority of your session should be focused on connection and education and giving. In the last five to eight minutes when you make your offer, you state it clearly and you state why it's an opportunity they have to take advantage of right now. You give a deadline on it. You keep the time frame short. You make it exclusive: "Only available through this webinar for the next 72 hours." Keep it short. Then wrap the event. End with the call to action. Don't end with questions. End with the call to action.

Step number eight is check in. This is critical. This is where you're going to take an okay event and make it a great event. The key to success with these online events, with the virtual events is follow-up. Follow-up is absolutely essential. It is

a must do, a 100% yes, you have to do this. As soon as your event is over, you're going to reach out and contact them. You're going to reiterate your offer. If you miss the call, we have a special offer. You can take advantage of it within this time frame and you want to follow up three times within the time frame of your offer. Reach out and send those emails immediately following the event, three touch points during that time period.

This is really critical. The exciting thing about this is you can set it up in advance so you can have them ready to go. This is part of the machine because all of these emails that are the follow-up and all the emails that invite people in on the front end can all be templates, can all be structured to say, "Okay, here's follow-up 1, here's follow-up 2, here's follow-up 3," and you write the copy. The only thing you change then for your next event is what the free offer is, what the content is of the webinar. These can all be systematized and templated to make your machine that you integrate in so the next time you do it, it's a whole lot easier and the time after that, it's even easier and then easier and easier. You get it down and you get into your rhythm.

Then step nine is capitalize. This is where we want to take a really close look at your recording, about the content, what did you have in there, and how can you cut it up, chop it up, look at it in a different way to repurpose it. How can we repackage what you presented and give it away through another channel. What are all the possibilities you could do with this. You want to reuse, recycle, leverage the content that you create. Do not just use it one and done. Be sure you're using it multiple ways after you're done with the event. This is where the power comes in so that you're not just one and done, gunning out an event and then wondering, "What am I going to do now. I just spent three weeks putting that together." Turn it into a blog post. Turn it into social media. Turn it into anything that you can use again to get more bang for your buck.

This has been a lot of information. That was the 9 steps to create your lead machine. I just want to reiterate here why it's worth your time, money, and energy to get in there and dig deep and create something over the next 30 days. Again, this is something once you create your machine you'll be able to pull it out and use it and we're going to use it proactively as a planned piece of your marketing plan. I'm going to get into that. You're going to hear about that in Videos 2 and Videos 3, but right now, the need to get that jolt in your business, to get that life back in, to get that heart rate going is shown here.

This is what I mean. If you're trailing along with very few clients, low dollar signs, and you need that burst, that jolt, that jump, whether you need it because you've been hobbling along for too long and you really need to make this practice work or you really need the big win to get you going, now, it's time for you to plan the event. Build the machine. Get it out there. Boom! Get some momentum so you can start to head up towards this point up here.

If you're entering this webinar at this level, so you have a good number of clients you're servicing. Things are good, but you've been plateaued or we talked about you have that feeling that there's so much more you could do that you're not up to your potential yet, then what you need to do, you put in the machine. Have your event. Get things going. Get that burst. Get the jolt. Get yourself going up to a higher level. Creating the machine now to get you moving, to get you over the inertia, to get you in the action, to get things revved up again is what we are focused on today.

If you keep doing these events one after another after another after another, eventually, you're going to run out of gas. It takes a lot of energy to create and run an event even as you continue to do it over time. If you were doing this all the time, you wouldn't even have time to service the clients that you had available. You have to get into your marketing rhythm. What is the cadence that you're going to have? You want to have a strategy, a marketing plan where you plan the year ahead proactively, that incorporates your lead machine into the normal cadence of your marketing.

In my next video, I'll teach you how to create a long term lead system. I'm going to teach you my two-prong approach to marketing so that you can get the foundation in place you need to be able to create the marketing plan that will carry you throughout the next year or the next two years. Yes, the 30-day lead machine can get you that jumpstart that you need. It will give us that jolt, that charge, but where do you go from there? That's what we're going to talk about in my next virtual workshop. The email is coming to your inbox in the next few days so be on the lookout for it. I look forward to having you join me there. If you have any questions or comments, please enter them below in the comments section.

I look forward to having you back on for my free virtual workshop in a few days, the "Long-Term Lead System." I'll see you there.

