

15 Proven (Yet Overlooked) Ideas For Filling Your Pipeline Quickly

Presented by Clifton Warren



Today's Objectives

- Maximise opportunities with existing clients
- Nurturing prospective clients
- Developing centres of influences
- Referrals from non-competing professionals
- Allocate your time and resources

Ideas are in four categories



Market contact to appointment ratios

- Direct mail 100:1
- Cold calling 20:1
- COI 10:1
- Seminars 2:1
- Referrals 2:1
- Networking 2:1

Existing Clients

1. LinkedIn referral marketing

What it is

LinkedIn is a powerful social media tool for establishing business connections and marketing

How to implement it

Connect with your top clients on LinkedIn. Review this network connections for ideal client fits.

Sample script

‘Mr Client, Jane Smith is on my marketing list and I noticed you are connected with her on LinkedIn. Would you be comfortable providing me with an introduction?’

2. Letter of introduction marketing

What it is

A letter of introduction takes the chill out of a cold call paving the way for a warm introduction.

How to implement it

Instead of just asking for referrals, ask your client to provide an introduction for you either in person, phone, letter or email

Sample script

'So I don't appear as a stranger would you be so kind to let Bill know that I'll be contacting about_____.'

3. Client advisory board marketing

What it is

This makes your best clients and centres of influencers part of your acquisition process

How to implement it

Identify 5-8 clients and hold a lunch or dinner 3 x per year to obtain the advice and identify opportunities.

Sample script

‘We putting together a team of our best clients whose opinions we respect to use as a sounding board.’

Prospective Clients

4. Periodic Updates marketing

What

A way to stay on a prospective clients radar and cleanse your list.

How

Twice a year send clients, prospects, etc. A single page letter with assorted enclosures to add value to their business and life.

5. Newsletter marketing

What it is

Newsletters electronic or hard copy are valuable marketing tools.

How to implement it

Consistency is important for readership. Monthly, bi-monthly or quarterly are the best intervals.

Sample script

‘Thanks for joining updates from... Here is what you can expect each month, bi-monthly, quarter.’

6. New announcement marketing

What

A wonderful opportunity to contact everyone you know.

How

The announcement may be by hard copy or email.

Sample script

‘We are pleased to announce that we are now offering a (Name of your service).’

7. Email marketing

What

Hand crafted emails written for an individual buyer positions you as a knowledge, professional expert.

How

Compile a list of targets, buyers name and email address. Look for triggering events that signal a need for your services.

Sample script

‘I understand that you are facing.....’

Centres of influence

8. Annual update marketing

What

Arranging an annual individual meeting with your key influencers.

How

Invite your professional network to dinner, provide breakfast or lunch in their office.

9. Quarterly dinner marketing

What

Opportunity for your best influencers to meet your top clients.

How

Quarterly hold a dinner or cocktail function, present a short talk on topic of interest by an influencer who has given referrals or likely to in the future.

10. Lunch and learn

What

Opportunity to obtain referrals without having to ask for them.

How

Invite to a lunch roundtable discussion, tailor the topic and ask each influencer to bring along a non-client guest.

11. Network marketing

What

Helping other professionals obtain new business.

How

- Join a networking club
- Network within an occupation
- Prospect pathing
- Join special interest group
- Build your own network
- Network with new acquaintance

New Opportunities

12. Seminar marketing

What

Many organisations and individuals want an expert to explain and interpret opportunities in the market.

How

Target the following four groups:

- Business clubs
- Service organisations
- Churches
- Adult education programs

13. Special report marketing

What

Packing your knowledge and expertise into reports and articles is an effective way to warm up a cold call.

How

Special reports are intended to establish you as an expert:

- Keep them from 1-5 pages
- Don't be promotional
- Print on high quality paper

14. Trigger event marketing

What

A trigger event is something that takes place in or outside your clients and prospects world that could indicate a need for your services.

How

Use Google Alerts, newspaper, centre of influences and your network to keep abreast of changes. Use this change as the valid reason why you are making contact.

15. Non profit marketing

What

Developing new business through non-profits is a natural approach as many business owners and executives are philanthropic.

How

- Put together a list
- Categorize by size and type
- Offer pro-bono services
- Serve in leadership roles

Implementation Guidelines

- Don't feel you have to try *all* these ideas.
- Try to walk away with just three or four ideas you can implement immediately.
- Keep an open mind.
- Many of the examples are from a wide variety of financial Services.
- Look for the core lesson and idea behind them.

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Clifton Warren is a recognized expert in marketing and selling of financial services. He is the author of the recently released book *Financial Services Sales Handbook: A Professional's Guide to Becoming a Top Producer*. His latest book *Cross-selling Financial Services: A Guide to Driving Organic Growth* will be released later this year.

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