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MASTERY

PRESENTS



STEPHEN OLIVER, MBA, Ph.D GREG MOODY, Ph.D

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STEPHEN OLIVER ([00:00](#)):

We're going to do some more analysis of websites, website development, what your website should look like. And I think it's universal, and by the way, big, big, big, big companies mostly have websites that suck.

Speaker 2 ([00:17](#)):

It's amazing. I mean, it's shocking. It's shocking to us as we look at these that they don't have a better grasp of really helping their planners or financial advisors-

STEPHEN OLIVER ([00:27](#)):

Drive new client traffic.

Speaker 2 ([00:29](#)):

Yeah. I mean, they're getting just a small fraction of what traffic they could get. So there's so much opportunity.

STEPHEN OLIVER ([00:35](#)):

You know what it is? They act like they're Coke or Pepsi.

Speaker 2 ([00:38](#)):

Yeah, exactly.

STEPHEN OLIVER ([00:39](#)):

They act like they're doing brand advertising.

Speaker 2 ([00:41](#)):

Yeah. I think they're hiring the same people as Coke and Pepsi. Now, if you're Coke and Pepsi, what your job is, is to get impressions. So you want people when they're going to the grocery store to go, "Gee, I want some Cola." And you never think about, you want some Cola, you think about, "Oh, I want a Coke, or I want a Pepsi." That's what you think about.

STEPHEN OLIVER ([00:59](#)):

But see, that's the only point of decision.

Speaker 2 ([01:01](#)):

Right.

STEPHEN OLIVER ([01:01](#)):

You and I went to Georgetown last night for dinner. They either have Coke products or Pepsi products.

Speaker 2 ([01:06](#)):

Right, you don't go, "I'd like a Cola. What kind of Cola do you have?"

STEPHEN OLIVER ([01:09](#)):

We ate out in Annapolis the other night. If we were going to get a soft drink, which neither one of us drink much of that, but it would have been one or the other. If you go to a movie theater, they have a contract with Coke or contract with Pepsi. If you go to McDonald's, they have a contract with Coke. If you go to... I forget which other chains have contracts, but the only place you... The only reason they're advertising is so when you walk into a grocery store, meaning a 7/11 up through Costco or regular grocery stores, when you're on the aisle, that you choose them, not the other guys.

Speaker 2 ([01:38](#)):

So, that's impression marketing. They're putting impressions in your head and you hear that a lot, and it's a big mistake for any of you to be thinking that way. You're never going to get enough impressions. And the financial companies, they are big, but you're usually not looking. People don't look for Schwab or for Edward Jones or for those kinds of companies. They're not really [crosstalk 00:02:02]-

STEPHEN OLIVER ([02:02](#)):

Well, another example is fast food. Taco Bell had the dog and whatever else, they have more recently, it's all I remember, and Wendy's, and McDonald's, but really all they want to do is when you take a lunch break and you drive to the intersection, you go, "There's Pizza Hut, there's a KFC, there's a Taco Bell, there's a McDonald's. Where do you want to go?" They want to win that decision while you're looking at them and their competitors. But we're in a completely different industry. What you need is, you need them to contact you, schedule an appointment, you need to get face-to-face, you have to build trust. And you could argue that brand advertising for the big companies, Mass Mutual, Northwest, et cetera, is useful for trust because they're recognized, but it's not useful for driving direct traffic into the individual advisors and-

Speaker 2 ([02:52](#)):

Not into your office.

STEPHEN OLIVER ([02:53](#)):

Yeah. Yeah. As a smaller, independent, you want to make sure that everything that you do, the website you're putting out, everything is designed to capture a new lead and designed to convert them into an appointment as rapidly as possible. But let's look at our slides. In a different segment we were looking at this site a little bit and see, from my standpoint, pretty much every advisor that I've talked to would probably look at this and go, "Wow, that's a pretty site. Those are pretty graphics. And that's a handsome picture of good looking people standing in an interesting area and their logo's kind of nice."

Speaker 2 ([03:33](#)):

And by the way, I think if they hired a mini website companies-

STEPHEN OLIVER ([03:38](#)):

Most.

Speaker 2 ([03:39](#)):

... and mini marketing companies, they would build this kind of site. They'd say, "Oh, we want to put your logo up top and we want to brand you, and we want to make you look good, and all that." But if you looked at our last segment, this probably converts terribly.

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STEPHEN OLIVER ([03:57](#)):

Yeah.

Speaker 2 ([03:58](#)):

They have a... And that's what you care about, what we call conversion.

STEPHEN OLIVER ([04:04](#)):

It converts for people who are out looking for them, they got directly referred, who are-

Speaker 2 ([04:10](#)):

Who are already home runs. They're already slammed dunks. People that were already referred to them, yeah, sure. They're going to come in here and they're going to hit the contact us page and they'll dig around for their phone number and call them. But that's not... Those guys were already going to call. It's no big deal. What you care about is for people that were looking for one of these things... In this case, they're specializing in these products. And some kind of... I'm not actually sure, because this is not really clear what they do or what their product line is. So, if somebody landed on this site, because we did a search on financial advisor to get to them, and we dug around-

STEPHEN OLIVER ([04:47](#)):

Financial Advisor Annapolis.

Speaker 2 ([04:48](#)):

Annapolis, right. Maryland or Annapolis, or Baltimore or Annapolis. I'm not sure which, but anyway, we found them-

STEPHEN OLIVER ([04:55](#)):

They're in Indianapolis.

Speaker 2 ([04:57](#)):

Okay. [crosstalk 00:04:58] So these guys were in Annapolis because that's where we are. We're at the Naval Academy doing some training for our high level members. But anyway, if we were looking for them, I wouldn't quite know what to do. I wouldn't-

STEPHEN OLIVER ([05:12](#)):

Let's look at that other site.

Speaker 2 ([05:13](#)):

Yeah, we'll show you another site that maybe have some other characteristics, because you can see them-

STEPHEN OLIVER ([05:17](#)):

Rather than beat them up too much.

Speaker 2 ([05:18](#)):

Our analysis before. So this is a different one. It's not the world's greatest, but we'll give you some other feedback. For one thing-

STEPHEN OLIVER ([05:24](#)):

But it's better than the other one.

Speaker 2 ([05:25](#)):

It's better than the other one. For one thing, look, if I was referred to them, at least up here in the top, you can see their phone number. So you could find them. And then, if we resized this to a mobile device, it's not great, but at least their phone number shows up, and 80% of searches are mobile. So, that's really critical. It's not really well done on mobile, but at least you could find their phone number.

STEPHEN OLIVER ([05:53](#)):

Well, and let's talk about a couple of things. They have top right-hand corner where people would be already trained to look, there's the phone number. That's a good thing. You have a direct link to their Facebook page or LinkedIn. And what's the other one there?

Speaker 2 ([06:06](#)):

I'm not sure what that one is.

STEPHEN OLIVER ([06:08](#)):

Yeah. Okay. And we're both technical or we're not sure what that one is. Do you want the first contact somebody has with you to be by email? I'd rather them reach out to me by email than nothing else, but really I want to drive them to call me, if at all possible. And if they are ready to make an appointment, they have a schedule an appointment link. I mean, if it were me, I would have that right there underneath the phone number. Right?

Speaker 2 ([06:35](#)):

Yeah. That'd be much better than an email. And the social media, that's a small point, but that should be at the bottom, not at the top because what you don't want to do is drive them off your page to Facebook or LinkedIn.

STEPHEN OLIVER ([06:48](#)):

Yeah. Well, and anchor that one in. The goal of Facebook and LinkedIn is to get them to your website. The goal of your website is not to get them to LinkedIn and Facebook.

Speaker 2 ([06:56](#)):

Yeah. So that's a bad error there.

STEPHEN OLIVER ([06:58](#)):

Yeah. But something that we both like, we looked at this just a second before starting here... We're working without a wire again.

Speaker 2 ([07:06](#)):

Yeah. We're randomly pulling sites up, so we're not picking these out to-

STEPHEN OLIVER ([07:09](#)):

To pick on or to... But we like the fact that they have a schedule, a webinar. Now it doesn't ever say free here. I would make sure it says free, but they have a bi-monthly Tuesdays at 4:30 Eastern to schedule a webinar. Now that's a good start because it's a low barrier to entry.

Speaker 2 ([07:30](#)):

Yeah.

STEPHEN OLIVER ([07:31](#)):

Now-

Speaker 2 ([07:32](#)):

If I could add onto that. So again, the low barrier entry idea is rather than have somebody schedule a meeting... So this could be schedule a consultation. The problem with that is it's too severe. It's too big of a commitment for a lot of people.

STEPHEN OLIVER ([07:45](#)):

Jumping too far ahead.

Speaker 2 ([07:47](#)):

Yeah, and in our example, it's like going on your first date and asking somebody to marry you. Like you said-

STEPHEN OLIVER ([07:52](#)):

Showing up at all first dates with an engagement ring.

Speaker 2 ([07:53](#)):

With an engagement ring, yeah. That's too severe. You need something in between like a free report. And this is a pretty good example of that. There's some things that we don't like about that particular type of offer.

STEPHEN OLIVER ([08:05](#)):

Yeah.

Speaker 2 ([08:05](#)):

I mean, one of them is, I just noticed this one now, it's bi-monthly so now there's no urgency. I could do it now, I could do it later, I could do it... If I don't like Tuesdays, then I'm [crosstalk 00:08:20]-

STEPHEN OLIVER ([08:19](#)):

Well, bi-monthly, when's the next one?

Speaker 2 ([08:23](#)):

Yeah. I don't know. Well, it's the next Tuesday, I guess.

STEPHEN OLIVER ([08:27](#)):

Was it last Tuesday or is it next week?

Speaker 2 ([08:30](#)):

Yeah. I don't know. That's very confusing.

STEPHEN OLIVER ([08:32](#)):

Yeah. Well, I mean, they're making a nice stab at it. Think in terms of all advertising, again, always wants a headline. Always wants an emotionally compelling headline. Once a headline that answers the question in their mind, and if somebody is showing up on search and doesn't know you, isn't directly a warm, referred lead. They are looking to solve a problem. Now they're not looking necessarily for an educational webinar. They're looking for information on whatever problem is in their mind that they're trying to solve. So market happy hour, what the hell is that?

Speaker 2 ([09:13](#)):

Yeah. I don't know what it is.

STEPHEN OLIVER ([09:14](#)):

Yeah, yeah. I mean, they have an idea in mind of what that means. And probably in reality, what they do is they get together and they discuss what's happening in the market and what you should be concerned about, and new tax laws or one thing or another. Fine. But I would come up with a much more compelling headline for that, and I would be much clearer on here. Now, what happens if we hit register?

Speaker 2 ([09:40](#)):

Yeah. Let me ask just one thing. I mean, these guys could be well-known in their industry, but to the general civilian, they wouldn't know. Now if this was, I don't know Steve Jobs and Bill Gates... [inaudible 00:09:55] still alive, Bill Gates and Elon Musk. And every bimonthly they had something, then recapping what they thought about important market trends, this would have been a big-

STEPHEN OLIVER ([10:06](#)):

[crosstalk 00:10:06] site care.

Speaker 2 ([10:06](#)):

Yeah. This would be a big seller, but these dudes, for the average civilian-

STEPHEN OLIVER ([10:13](#)):

Well, who's a celebrity in this industry?

Speaker 2 ([10:16](#)):

Well, Fisher was-

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STEPHEN OLIVER ([10:19](#)):

Yeah, well, I mean, that's a... Well, he's back.

Speaker 2 ([10:22](#)):

He's back.

STEPHEN OLIVER ([10:23](#)):

The unbenched him.

Speaker 2 ([10:24](#)):

Yeah.

STEPHEN OLIVER ([10:25](#)):

But really, I mean, that's about as good as you get, and the general public doesn't know who that is.

Speaker 2 ([10:30](#)):

Right. The general public is more like Dave Ramsey or... That would be somebody, but still they're marketing... You're still marketing [crosstalk 00:10:41]-

STEPHEN OLIVER ([10:41](#)):

It's like in martial arts, everybody thinks that they're a celebrity, but I would always say there's Chuck and Bruce, and other than that, forget it. They don't know who you are. Right?

Speaker 2 ([10:51](#)):

Right.

STEPHEN OLIVER ([10:53](#)):

Let's go down the page a little bit.

Speaker 2 ([10:54](#)):

Well, you wanted to look at the register. Let's say somebody registered and generally you'd want to have just registered, not linked, or more. But let's say we went to a register. This content isn't very compelling.

STEPHEN OLIVER ([11:07](#)):

Compelling in any way at all.

Speaker 2 ([11:09](#)):

It's a bimonthly, so apparently that means every other month instead of twice a month, I guess. I apply as every other month, I'm not sure how to do dates, but tune in for discussion with our veteran research team to learn what we're observing and thinking. And then, I don't know how compelling that is for you. Maybe a lot of you guys on the-

STEPHEN OLIVER ([11:32](#)):

[crosstalk 00:11:32] Well, and frankly, that's an awful long time gap is somebody who if somebody was actively researching.

Speaker 2 ([11:41](#)):

Yeah. It's not as-

STEPHEN OLIVER ([11:41](#)):

So every-

Speaker 2 ([11:42](#)):

Yeah, our idea is that we want to give somebody that's a prospect, get them in to our business and get them to respond. That's a long... They're probably not going to respond, plus it doesn't look like there's any limits to how many people can do it. So, I think, "Well, September 21st, that sounds okay. I'll wait until September 22nd or 20th and register. Or maybe I'll do the November 16th but I'll come back to the website on November 15th.

STEPHEN OLIVER ([12:13](#)):

And I've got to guess, again, we don't know them. Haven't looked at their numbers if they're keeping them; probably are. But I would have to guess that most of the people who show up for their market insights are already clients. From this standpoint, it's a great client service situation to keep them engaged. Not great from a standpoint of, I got a live prospect who's looking at my site to move them to the next stage, especially with the timing. Now, if I wanted to move live prospects, I could have what we would call a fake webinar. Right?

STEPHEN OLIVER ([12:48](#)):

I could have the twice a week, we have a special current insights on what's going on and then make it as evergreen as possible. And I could have the call to action, even if I wanted it to be, Option A make an appointment, Option B, get our, real time market updates delivered daily. So they're opting into your email followup among other things. See that could be a call to action. Get our daily updates. But again, it was a good idea, fairly poorly implemented from a standpoint of prospective clients, probably useful for existing clients.

Speaker 2 ([13:30](#)):

Want to go on to another site, maybe?

STEPHEN OLIVER ([13:32](#)):

That's all we got?

Speaker 2 ([13:33](#)):

Yeah. That's it down there.

STEPHEN OLIVER ([13:36](#)):

Okay. Are they doing any SEO stuff?

Speaker 2 ([13:40](#)):

Doesn't-

STEPHEN OLIVER ([13:45](#)):

Doesn't look like it.

Speaker 2 ([13:45](#)):

Yeah. Doesn't look like it. So what we're talking about with SEO would be a blog, a podcast. In fact, if they're doing this happy hour every other month, they should be videoing it, recording it, turning it into a podcast, transcribing it, turning it into a blog to add more contact back in their site. They're not.

STEPHEN OLIVER ([14:02](#)):

Posting it on their YouTube channel. And they might be doing that and they're just not feeding any of it from the website.

Speaker 2 ([14:10](#)):

Yeah.

STEPHEN OLIVER ([14:10](#)):

Okay. So here's another site. And by the way, I sound like a broken record. All ads need a headline, and above the fold on your website is where the headline goes. And what you want is you want to get inside the conversation already going on in their mind. And if it's an existing client, that's a different category. But if it's a new prospect, that's showing up at your site, they're looking to solve a problem for themselves. And they really don't care about your team. They don't care about you. They're not trying to-

Speaker 2 ([14:44](#)):

Dedicated to serving your needs is like, it could be hospital, that could be-

STEPHEN OLIVER ([14:48](#)):

Yeah, they're not trying to show up because they're trying to make new friends... Long-term, that's important, but where's the headline? What's the compelling activity that they do? So again, we've got their name up here, their name here, the only thing compelling that they're trying to make compelling to get you to do something on the first page is learn about our team. And by the way, you scroll down and guess what you're doing? You're learning about their team.

Speaker 2 ([15:20](#)):

Yeah. And there might be... I mean, they're a multi-location area, so they may need to have a location dropdown and something, but they still could have an offer. They still could have a headline.

STEPHEN OLIVER ([15:34](#)):

And by the way, if we went through LinkedIn right now and looked at... And again, well-dressed, attractive people. But if we went through LinkedIn right now, went through a thousand profiles, every headshot will look just like these.

Speaker 2 ([15:50](#)):

Exactly.

STEPHEN OLIVER ([15:51](#)):

Right. There's nothing that makes any individual unique, there's no personality involved. They all are against the same background or against the same fake background. We don't know. So, even that misfires.

Speaker 2 ([16:07](#)):

Yeah. There's nothing here to make... If I was looking for help with one of the things that they help with, what do I do next? Now I might hit contact and then there's a little tiny phone number... And maybe they fill the form out. For what reason? What am I interested in? In fact, since they're multi-location, wouldn't it be nice for them to have something about what location that they're interested -

STEPHEN OLIVER ([16:37](#)):

What area geographically [crosstalk 00:16:39] -

Speaker 2 ([16:38](#)):

Yeah, who's going to call them back? I mean, the three, one, twos, I'm not sure what area code that is and I'm not sure what state that's in.

STEPHEN OLIVER ([16:45](#)):

Go to another one.

Speaker 2 ([16:46](#)):

Yeah. This one's pretty bad. Yeah. So, if I was... And this is clearly a larger company, so they could invest some money in this and it could 10 times their results from their online traffic. At least. Maybe a hundred times. I mean, so here's one, this was pretty highly ranked. They've got their phone number at least on top, but here's a good example of what we see a lot of times where the first... There is an offer right here. So, that's good. But it goes right to the engagement ring.

STEPHEN OLIVER ([17:16](#)):

Yeah.

Speaker 2 ([17:16](#)):

It's talk with a financial engines planner today. So they're asking you to set an appointment. There's a problem, some technical things here, and these are nitpicks, but they have too many fields on their form. Now they're probably asking for a zip code because they want to get them to the right location. Yeah. But if they reduce the number of fields, they'll get a better conversion rate. They're looking for investible assets to prequalify them.

STEPHEN OLIVER ([17:47](#)):

Or two-step it, right?

Speaker 2 ([17:49](#)):

Yeah.

STEPHEN OLIVER ([17:49](#)):

So a lot of times what we do is we'll get name, email, phone number, take him to a different page, with an offer of, "We'd like to send you our free book. We'd like to send you our free packet of information." Then we capture a mailing address, investible assets, other information that we would need to know what the value of the prospects,

Speaker 2 ([18:09](#)):

This might lower their conversion rate 50% because they're asking for too much stuff, I'd rather get less stuff, get the conversion rate up. And then on the second page, ask for more information. And then usually you don't have any drop in conversion rate, but you'll improve your overall performance. Yeah. But that's a little complicated for now, but anyway, this is an appointment. So again, if this was a free report. And again, it could have a scheduling link instead of that.

STEPHEN OLIVER ([18:33](#)):

Yeah.

Speaker 2 ([18:33](#)):

Right? And so far, there's no free report on this, free book on this, join us for a free webinar. Here's a free video about that. And again, it says 150 locations managed 260 million assets. [crosstalk 00:19:01] Yeah, they ought to be able to have a good webpage.

STEPHEN OLIVER ([19:04](#)):

Yeah, kind of like these. But the problem here is again, planners, I mean, it's kind of like who drives the flashiest car? They like to talk about how much assets under management, all that kind of stuff, but that's not talking to the individual's needs. That's like, "Oh, look how big we are."

Speaker 2 ([19:25](#)):

Right.

STEPHEN OLIVER ([19:25](#)):

Right.

Speaker 2 ([19:26](#)):

Yeah. Does that make me want to work with them, because they manage a lot of assets?

STEPHEN OLIVER ([19:30](#)):

Yeah. Maybe it means I'm going to get lost in the shuffle and you're not going to know who I am and, oh my goodness I'm only a school teacher, or I only have 600,000 and maybe I'm going to get lost in the shuffle. You want to be careful with that kind of stuff. I mean, there's some usefulness in the right time and place. But if you really want it to take this one and drive traffic for your advisors, you would be... See everything [crosstalk 00:20:04] -

Speaker 2 ([20:03](#)):

This should just take us to the get started whatever that is.

STEPHEN OLIVER ([20:07](#)):

Yeah. I would have a free offer. For grins, go to Fisher and let's see what it looks like. I haven't looked at... I've looked at a lot of their landing pages. There's the official company website. Okay. And to be fair, they start with let's talk too. What we offer, calculators, investing guys. Let's take on a few of those to see where it takes us.

Speaker 2 ([20:42](#)):

Yeah. So this gives you something to do.

STEPHEN OLIVER ([20:45](#)):

Yeah.

Speaker 2 ([20:51](#)):

And some options like these.

STEPHEN OLIVER ([20:55](#)):

And what happens if I go to knowledge center? Daily... Okay. Let's see. Let's see. What was the menu dropdown? Okay. Coronavirus, annuities, daily commentary of what we're reading, subscribe, market cycles. Okay.

Speaker 2 ([21:19](#)):

So this daily commentary is probably important cause they're putting out daily content at a high level. So this is very good.

STEPHEN OLIVER ([21:27](#)):

Yeah. Yeah. Yeah. Filtered articles by topic year. Most recent, they always have a direct... There's a download new market outlook. What happens if you say read more on the new stock market outlook?

Speaker 2 ([21:51](#)):

[crosstalk 00:21:51] click it again. It should be just click once.

STEPHEN OLIVER ([21:54](#)):

Yeah, it should. But that we haven't-

Speaker 2 ([21:56](#)):

It's still pretty good.

STEPHEN OLIVER ([21:57](#)):

Yeah. Now we have an opt-in page. You're clicking this in order to receive something for free. So, they are asking for more information, going back to what you were saying a minute ago, however, they're more likely to get it because there's a reason to opt in. I'm getting in this gates, their stock market outlook, and they have a bunch of these things. I keep sharing with our clients, their different ads.

Speaker 2 ([22:21](#)):

And what I'd also say is everywhere you go, for the most part, they should have an offer option here. This is the only place I'd criticize them. They only have the phone number. There should be a way to get the offer in these areas as well. But when we were looking back... Let me go back to the... Like in the calculator section, if I'm doing the annuity calculator... Where did I see it? Maybe it was a 401k calculator, but anyway, in a lot of these places, there's a way to... It looked to me, yeah, under here, if you go to the bottom, you can find a location or connect... Yeah. They should have a quicker way to maybe get an appointment other than the phone number. They maybe should have find a location up here. Other than that, I don't have a lot of criticism of them.

STEPHEN OLIVER ([23:15](#)):

Yeah, yeah.

Speaker 2 ([23:15](#)):

This is pretty good because you can get to... If you decide at any point, yeah, I want to work with these guys, you can call somebody. You can call the 800 number. I imagine at that point, and I don't know if you called that number, but you probably put in a zip code and then it'll route you to the closest location. Or they have a team of operators that will then-

STEPHEN OLIVER ([23:37](#)):

Call center.

Speaker 2 ([23:37](#)):

Call center that... They could do it either way. Either way would work really well and they get your information, and then they would then an advisor to call you directly.

STEPHEN OLIVER ([23:47](#)):

I was at a meeting recently with Dan Kennedy and Ken Fisher, and Ken Fisher made a really interesting comment. He said, "Early on when he was growing and when he was still relatively small, all of the direct response marketing he was doing, was doing so well. We see it all the time. Full page ads in the Wall Street Journal now, and direct response, TV spots, direct response, Facebook, direct response, as everywhere. He said it was working so well that he was terrified that the big guys were going to knock him off. And so, what he did is he started looking for an investor for a partner who would inject capital in the company, so he would have enough capital to ramp it up, roll it out quickly so that the big guys wouldn't be able to blow him out of the water once they figured out what was working.

STEPHEN OLIVER ([24:39](#)):

In the process of trying to do that, he talked over and over to people, many of them in the existing big companies. And they all said the same thing. He said, "Oh, we've tried advertising, that doesn't work. We'll try direct response marketing and that doesn't work. All over [inaudible 00:24:52] that doesn't work. Well, it works great. It's just that they weren't working in the right way. Right? So whole bunch of people who didn't know what they were doing, that's why like Ogilvy's, he was really the first real advertising agency on Madison Avenue who understood direct response. He would say the direct mail guys are the only ones who really know what's going on because they track their numbers. where

everybody else, he was the inspiration for the TV show, Mad Men among others. But in fact, Ogilvy advertises one of those must read books.

STEPHEN OLIVER ([25:25](#)):

But it's an interesting contrast. And again, I'm pretty sure they're testing everything on here, but at first glance I would beat it up a little bit.

Speaker 2 ([25:37](#)):

Yeah, if you go to talk with us, it does ask for their information, and proceed to step two. So I'm sure they're gathering your investment information.

STEPHEN OLIVER ([25:46](#)):

Oh, and I was talking to somebody recently, he said, "Well, they don't do direct mail anymore." Oh my God. Sure they do. In fact, I just pulled the control piece. The piece that's working the best for them; for Fisher. They're doing that. I get stuff from them all the time. So yeah, they're doing a lot of direct mail as well as email and phone calls.

Speaker 2 ([26:07](#)):

Yeah. If you fill out the letter... And by the way, we recommend that you do this, we recommend that you fill this out content.

STEPHEN OLIVER ([26:13](#)):

Play prospect.

Speaker 2 ([26:14](#)):

Yeah. Act like you're a prospect. Fill that out, fill all that information out and then hit, proceed, and then fill the rest of it out. And so what if somebody calls you? That's fine. You don't have to invest with them, but it's okay. See what they do. And you'll learn something from the way that they contact you and the way that they talk to you. It's

STEPHEN OLIVER ([26:33](#)):

Go to investing guides. Yeah. See, this is what I'm talking about. See these different guides, every one of which is baked for you to give them information and for them to be able to then nurture and follow up.

Speaker 2 ([26:53](#)):

In all of this content that's written about the guide is to get more content out on the internet so that when somebody searches for, help me with my annuity, then their website will come up.

STEPHEN OLIVER ([27:06](#)):

Yeah. Yeah. But each of these guys... Why don't you click there? You're going to come into a lead page. You're going to come into an opt-in form. And then yeah.

Speaker 2 ([27:19](#)):

You're going to fail here and then there, and then this'll be for the annuity guide.

STEPHEN OLIVER ([27:29](#)):

Yeah. And they even have an assumption there that you may be using a financial advisor already, or that you have... You think you have a plan put together and they have a little check box on each one of them. Would you like to talk to a financial advisor? It never hurts to have a second opinion.

Speaker 2 ([27:47](#)):

Yeah. Right. And you got to understand, sometimes we talk to people and they go, "Well, I don't want to give all that information out because why do they need me?" Maybe they'll just invest on their own. Well, maybe they could, that'd be fine. Then maybe one day when they don't want to do that, they'll come to you. But they're supposed to be their advisor. So if they end up using your website to get a lot of good information, would it be more likely that they'd come to you? The danger of that is very, very low. Giving your information away and having them know more about you and having them start trusting you is really the foundation of them wanting to work with you.

STEPHEN OLIVER ([28:21](#)):

And the studies actually showed the opposite of what people think, right? Is the more you educate them. The more one they trust that you're the expert. And number two, the more they realize that they want somebody to do it for them. They don't want to do it themselves. And that's the primary reaction. And by the way, the higher they move up on the income... And this is contrary to what people think. They think, "Oh, people who aren't knowledgeable my want us to do it. People who are really knowledgeable might not." Right. Well, it works the opposite. People who are CEO of a Fortune 500 or anywhere in that direction, they know the value of their time. They know that how scattered their ability to focus on a one thing is based upon all of the demands on their time.

STEPHEN OLIVER ([29:04](#)):

And they know that maybe they feel like they could do it as well as you could, but they're not going to take the time and effort that you'll do on their behalf for compensation. So they'd rather have somebody do it for them. I mean, that's what you and I operate, right? Is... One of my staff got me a key chain one time, it says, "So many things to do, so few people that do it for me."

Speaker 2 ([29:27](#)):

Right.

STEPHEN OLIVER ([29:29](#)):

But that's the way the higher they are on the asset scale, the higher they are on the income scale, the higher they are managerially or owning their own business. That's the way they think about the world.

Speaker 2 ([29:38](#)):

Yeah. And those are the kinds of clients you want to have anyway. Those are the ones you want to have that are going to be useful for you to work with.

STEPHEN OLIVER ([29:44](#)):

Yeah. So anything else on this one?

Speaker 2 ([29:47](#)):

I don't think so. I mean, this is a really good... I mean, this is much more enormous than you'd probably produce for yourself. At the same time, this is a good model to follow. This is a good model of follow for conceptually, what you're trying to do. But this is the only big company we've seen that does even a moderately good job. The rest of them are horrible. We could show you a good example. Look up any-

STEPHEN OLIVER ([30:12](#)):

I would still argue, it needs a powerful headline. It needs a more direct call to action.

Speaker 2 ([30:16](#)):

Yeah. It's at least vaguely there and at least you can go directly to talking to somebody. At least there's a phone number, at least there's a podcast.

STEPHEN OLIVER ([30:27](#)):

[crosstalk 00:30:27] Yeah. There we go.

Speaker 2 ([30:28](#)):

Yeah, there's a podcast. There's content that's daily. They're doing a lot of really good things and compared to the crap that we see to, be frank, if it compares to the rest of the industry, it's a 10. If it compares to what should happen, it's a-

STEPHEN OLIVER ([30:46](#)):

Eight and a half, nine.

Speaker 2 ([30:47](#)):

Yeah, pretty good.

STEPHEN OLIVER ([30:48](#)):

Yeah.

Speaker 2 ([30:48](#)):

But yeah, we could make them a lot more money if we gave them some advice about fixing him and got some other things done. And that's without looking at the tactical scores, which might reveal some other things as well.

STEPHEN OLIVER ([31:00](#)):

Probably pretty good, I would think.

Speaker 2 ([31:01](#)):

Yeah.

STEPHEN OLIVER ([31:02](#)):

I mean, they're smart.

Speaker 2 ([31:03](#)):

Yeah. But for your site, if you looked at what we showed you before and what we see with almost everybody's individual... For individual advisors and for smaller companies, you've got a lot of work to do to fix these things. When you fix them, your results... We're not exaggerating, 10 to a hundred times more because the conversions are just so anemic without fixing these types of issues. So it's-

STEPHEN OLIVER ([31:29](#)):

Most people don't even... You throw out those numbers. Most people don't know what their site's producing. Right?

Speaker 2 ([31:36](#)):

Well, that's right.

STEPHEN OLIVER ([31:36](#)):

Yeah. They'll say, "Well, where do most of your clients come from?" And they'll say, Referrals, or they say, well, they went to our website, but usually the ones that got to their website were somebody's aunt is already posted.

Speaker 2 ([31:49](#)):

Yeah. They're already the slam dunks. They were going to find you anyway. And so just because you got found on your website, just because you maybe even do a search on financial advisors and you're ranked, that doesn't mean that you're actually getting the traffic that you need to get, because Google knows what you're searching for. So when you search for financial advisor and you pop up, that doesn't mean that you really pop up for everybody else.

STEPHEN OLIVER ([32:13](#)):

Yeah.

Speaker 2 ([32:14](#)):

That's a really important thing to remember. And you may sleep comfortably thinking that that's all working right. It's probably not, unless you get it really looked at clearly. And that's one thing we do. That's probably one of the first things we do with our clients is take a look at this stuff. And it's small investment of time to make for really big returns. Yeah.

STEPHEN OLIVER ([32:32](#)):

Super high priority though, is to know what your numbers are, right? It's always track stats. And with the website you're tracking, I mean, Google analytics is free, for goodness sakes, is what you want to know is, at the very least, how many unique visitors get there? Where did they come from? There's a lot of apps that we use behind the scenes. They're kind of pricey, but we can track, where you're ranked on all the different keywords, we can rank on how much traffic you're getting per keyword, what specific keywords they searched for when they got there, all that kind of stuff. But what you definitely want to know is how many unique visitors you're getting, what's your bounce rate is. So that means they got to your main page and they looked at it and said, "No, this is not for me. And either that's, you're showing up, they're looking for what would be an example. They're looking for a payday loan and they come up with a financial advisor

Speaker 2 ([33:26](#)):

And they might've gone to your site,

STEPHEN OLIVER ([33:28](#)):

Or you don't have a compelling headline. And in their mind, it's like, "I don't want to meet your damn team. I'm trying to answer this question." Right?

Speaker 2 ([33:36](#)):

Right.

STEPHEN OLIVER ([33:37](#)):

And then you want to look at unique visitor to opt in. So of people who show up at your page, how many of them fill out your form? And then of the people who fill out the form. and if there's a two-step form, how many fill out the second step of the form? How many of those end up making an appointment immediately? So you want to know what that ratio is. And then ultimately, how many of them end up making an appointment within a period of time? Let's say 90 days, right? And this is again, we say it often, but it sounds kind of schizophrenia, but there's two things you want to accomplish. Make an appointment immediately and get everybody who's not ready to make an appointment immediately, so you can educate them and get them to make an appointment eventually.

Speaker 2 ([34:19](#)):

And have followup sequences to make sure we call them texts and email. And that was in another sector-

STEPHEN OLIVER ([34:24](#)):

Direct mail.

Speaker 2 ([34:25](#)):

And Direct Mail. Lots of exciting... Yeah. A whole bunch of different media that we'd hit them with. But, if that glosses your eyes over when Steve's talking about the different, the different stats that you keep, you need it to know... I would also add phone calls. We need to track phone calls and opt-ins from the website and unique visitors. So we don't how that converts. And if that's not good, then we need to get into the details of-

STEPHEN OLIVER ([34:51](#)):

And by the way, that's all in the software. It's all automated.

Speaker 2 ([34:53](#)):

It's all automated. And anybody that's working with you on your website... This should all be outsourced. If you're going to build in this stuff yourself, and you're using Wix or Squarespace or one of those things-

STEPHEN OLIVER ([35:05](#)):

Oh God no.

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Speaker 2 ([35:05](#)):

Automatically, you're doing it wrong. So, I mean, we don't have to do any analysis. We don't have to work with you automatically. Those are going to be poorly ranked. It's not going to work. Any of those free types of deals, it's not going to work, and you're going to get a fraction of the business that you need. So, unless... Yeah, unless we've already gone through this with you and you're meeting these kinds of things so that this is a big area, it's really job one, because it's a big area. You can get a 10 times, a hundred times a bump in your business. I mean, it really makes a big difference.

STEPHEN OLIVER ([35:36](#)):

And we could do another five hours on this, but we probably should wrap up.

Speaker 2 ([35:39](#)):

Well, and this can give you enough information so you can make smart decisions about it. And that's what we really want to accomplish today. So, that's really it that I had.

STEPHEN OLIVER ([35:47](#)):

Yep. And we'll see you on a different segment. Thank you.

Speaker 2 ([35:50](#)):

See you next time.