

THE AUTOMATION AUTHORITY

# How BRANDON STUERKE'S Revolutionary Approach to Marketing is Transforming the Way Advisors Build Their Practices



In this Q&A, founder of Automated Advisor, Brandon Stuerke shares how he brought marketing automation to the financial services industry and why it's a must for advisors wanting to build profitable practices.

#### How did you get involved with marketing automation?

I've been an advisor since 2001 and struggled early on like we all do building our businesses. I was drawn to the idea of marketing automation because I saw how it was working in other industries to save entrepreneurs substantial time, money and energy, while getting them in front of more qualified clients.

I struggled initially though, thinking marketing automation was all about the software – platforms like Salesforce, Infusionsoft, Marketo, etc. At first I was just like most who purchase these tools, only leveraging 5-10% of their capabilities.

### So what exactly is marketing automation, if it's not the software itself?

While the software is an important piece, what really makes marketing automation effective is your *strategy* and how you use the software. Learning how to truly leverage marketing automation took me years of intense focus. I sought out, hired and mentored with the best automation marketers in the country. I then worked diligently applying all that I'd learned to the financial services industry.

When launching Automated Advisor, I drew upon my twelve years of experience as an advisor as well as the collective experience of dozens of the most successful advisors in the country. Together we mapped out the opportunities for advisors to leverage automation. We designed funnels and campaigns to help advisors reach more prospects, capture more leads, nurture those opportunities and finally, increase client retention and referrals.

## How do you help advisors develop the funnels to guide prospects down the path to conversion?

We start by mapping all of the potential paths a prospect might take. We then work with the advisor to develop custom educational tracks and predetermined campaigns and follow-up sequences to develop the opportunity. The result is a funnel that produces qualified appointments with prospects who are pre-educated, pre-qualified and predisposed to doing business with you. We've effectively automated the first 60% of the sales process.

## How is Automated Advisor different from other automated marketing services?

One thing is how long we've been focused on automation. It takes years to really learn to create effective MAPs (marketing automation plans), not to mention the time it takes to test and refine those strategies based upon real world results.

"If you're not implementing automation now, then over the next 2-3 years you're going to get crushed by the advisors who are."

Another differentiator is our "done for you" business model. We don't just help advisors MAP strategies for their businesses, but we bring the team to the table to help them implement those strategies as well, so they aren't bogged down with having to learn or hire new skill sets. Also, because we're not an IMO or broker dealer, we're able to stay laser focused on what we do better than anyone else: helping advisors escape the trap of living from one sale to the next and instead build scalable, efficient businesses.

### What do you see for the future of marketing automation?

It's going to be huge. Just follow the dollars. The companies that provide marketing automation software have been growing fast, and large investment firms are pouring resources into these companies. InfusionSoft for example secured \$109 Million in funding from Goldman Sachs, and Bain Capital from 2013-2014 alone. To me, this speaks volumes. These investment firms know that mass adoption is right around the corner and that marketing automation is set to explode onto the scene in a big way.

The truth is, if you're not implementing automation now, then over the next 2-3 years you're going to get crushed by the advisors who are. But for those with vision, who do begin implementing automation now, by the time your competitors catch on you'll be too far ahead to even compete with.

## You sound like you have a lot of enthusiasm for this industry and marketing automation. Where does your passion come from?

I know intimately the pain and struggle of striving to solve all of the challenges that we face as advisors. It's tough being an entrepreneur; in fact, it's the hardest thing I've ever done. We work so hard to get to where we want to be and it's easy to become frustrated with the process along the way. So when an advisor comes to me with their unique challenges and goals, I feel an instant entrepreneurial bond with them. It's exciting to look with them at their business, see the opportunities and then use the skills I've developed to create a unique strategy to help them grow. To me there's nothing more professionally rewarding.

Discover the power of marketing automation and how you can use it to transform your business – download Brandon Stuerke's FREE report, "Introduction to Automation: How Financial Advisors are Combining Strategic Marketing with Automation Technology for Explosive Growth" at www.AutomateMyPractice.com.

