
Perfecting Your Prospecting

A guide for independent financial advisors to connect
with highly engaged prospects in their market.

BETTER LEADS, BETTER RESULTS

Our goal at FMT is to help independent financial advisors maximize their Return on Time. There are only so many hours in a day, and for advisors, a large share of those hours are spent on efforts to grow their client base. By using FMT's educational marketing platform to execute a more efficient and effective client acquisition process, advisors are able to drive improved results while reclaiming their most valuable resource - their time.

A key aspect of driving improved Return on Time is a focus on lead quality over quantity. If traditional seminar marketing is looking for needles in haystacks, we're doing our best to hand you a complete sewing kit. Working with FMT connects advisors directly with the highest-potential leads in their markets - leads that match their firm's target audience, in an active decision-making mindset, eager to learn from an expert instructor. Our instructors aren't packing bored banquet rooms - they're making direct connections and establishing trust relationships with prospects that have already started down the path to client conversion.

Our client advisors consistently see follow-up rates over 70% - and it all comes down to getting the right people in the classroom and working to establish trust with them.

To drive this level of success, we consider six keys to identifying and engaging the highest-potential prospects in a market: These keys drive understanding of the needs of your firm, of your marketing audience, of an engaged student, and of a successful educator.

Over the following pages, we'll explore how each of these keys form the foundation to success in educational marketing and drive increased Return on Time.

KEYS TO IDENTIFYING AND NURTURING YOUR IDEAL AUDIENCE

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- The right people
 - The right approach
 - The right motivators
 - The right environment
 - The right curriculum
 - The right expertise

THE RIGHT PEOPLE

Understanding your ideal audience starts with understanding the strengths of your firm

Do you deal primarily with adults approaching the end of their careers? Do you focus on helping retirees maximize their lifetimes of savings? Do you specialize in helping small business owners transition to their next life stage? Your firm's ideal audience is defined by more than their age, location, and assets. Think about traits like education, family status, spending habits, and health. Draw comprehensive pictures of clients your firm serves best or segments your practice wants to grow, and tailor your marketing campaigns to capitalize on those opportunities.

Emerging data modeling technology has enabled campaign targeting to move beyond an age-and-assets-based spray-and-pray approach. Data from hundreds of sources can be analyzed to identify high-potential audiences that align more closely to your firm's ideal customer profile. Don't waste time pitching to a room of unqualified prospects, and don't waste your money marketing to them in the first place.

THE RIGHT APPROACH

When you've identified the right audiences for your educational marketing campaigns, it's important to engage them in an effective manner. This is where educational marketing - true educational marketing - really shines, accelerating trust development, lowering time-to-close, and building the foundations for more profitable long-term client relationships.

*Want to learn more about becoming a trusted advisor
through educational marketing?*

[Click here](#) to download our piece on Accelerating Trust Development

When large volumes of complex information are readily available, people become skeptical about what is true, how much they understand, and who to trust. Dedicating time to education allows you to demonstrate your expertise, engage in thoughtful conversations, and tailor the shared time to the needs of your students. It's the optimal way to establish trust both as a subject matter expert and as a person who understands the needs and concerns of others.

THE RIGHT MOTIVATORS

Motivation is the key to an engaged audience

A free steak dinner might get people in a room, but it doesn't demand attention, communicate expertise, or engender trust. Prospects need to be personally invested in achieving a meaningful outcome from their time, and the value exchange that our platform provides drives that personal investment.

Attending an FMT-driven course requires meaningful commitments from prospects. We ask for six hours of a family's time over two different class sessions, and attendees are charged a tuition fee. In return, they receive access to course content and materials, but more meaningfully, access to our expert instructors. People spending time and money to attend a class are going to be intrinsically motivated, engaged learners, and eager to look to instructors for guidance.

THE RIGHT ENVIRONMENT

Venue and classroom setting are fundamental to both setting expectations and facilitating an effective learning experience.

Hosting courses in a well-known, established educational venue such as a local university or community college will deliver credibility to prospects before the sessions even start. Using these venues also ensures a space well-suited to exchange of information, access to learning aids, and free from distraction.

Many of our most successful instructors have developed long-term relationships with their

preferred venues, and have established seasonal cadences of regularly-occurring courses. This recurrence helps establish the instructor as a part of the institution's community, as well as providing more opportunities for lead conversion: if a prospect can't attend the fall sessions, there's always the winter term around the corner.

THE RIGHT CURRICULUM

One size does not fit all in education.

It's important to align your course content with your expertise and target audience, and bring flexibility to the classroom to address specific needs. Resist the urge to skim the surface and “save the good stuff” for after conversion. Share real-world stories and give attendees the meaningful knowledge they seek to improve their financial lives.

Combining FMT's life stage-aligned curriculum with relevant insights and stories from your experience positions you as a credible subject matter expert and a likely “first call” when prospect families need more personal guidance. No matter how much great information and advice you deliver in the classroom, clients will always need more.

THE RIGHT EXPERTISE

Teaching is difficult. To be good, and to drive connection with the prospects in your classes, you must embrace the role.

You're not there simply to deliver the information in the slides and workbooks, you're there to establish yourself as a trusted advisor with your attendees. The more you're able to demonstrate the value of your knowledge, the more trust you'll build with course attendees.

Let your attendees know who you are and how you got there. Don't recite a resume - give your audience a point of connection to understand

why you've chosen to become an advisor and a financial educator. Take advantage of opportunities to share stories or work through exercises that demonstrate your experience with people with similar questions and challenges to those that arise in class. FMT's multi-session class format provides plenty of opportunity to follow the story of each class - take advantage of the time to become a trusted resource!

BETTER LEADS, BETTER RESULTS WITH FMT

FMT's educational marketing platform provides the tools your firm needs to boost its Return on Time.

- FMT helps find **the right people** by using decades of data and emerging targeting tools to identify the highest-potential prospects in your market.
- FMT embraces **the right approach** by delivering a true educational experience for those prospects.
- FMT ensures **the right motivation**, using a real value exchange to place intrinsically-motivated leads in the classroom.
- FMT creates **the right environment** by engaging local educational institutions and facilitating long-term community relationships.
- And, most importantly, FMT enables you to demonstrate **the right expertise** - in the right way, to the right people, in the right place, for the right reasons - to accelerate trust development and create a more efficient and effective client acquisition practice.

If you're ready to learn more about how FMT can help you connect with your best prospects, call or email us today.



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Let's start growing better, together



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