

CASE STUDY

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Financial Advisor



CLIENT'S SITUATION & CHALLENGE

- Wants a credibility boost being seen as a younger advisor who's competing with an average age of 55 among his competition
- Wanted a better way to educate people
- Wants more ideal clients, people who get what he does, and how he works
- Wants to spend less time selling (reduced sales cycle) and more time planning and building relationships
- Wants more efficient marketing re his time and digital marketing's efficacy
- More targeted approach to marketing - zone in on specific audiences to build business
- Communication system to allow their clients to access their advice 24/7
- Want a strategy that will build momentum year over year and won't require the to re-invest their marketing every 90-180 days

INFLUENCE ACCELERATOR APPROACH

- Market like an expert
- Create core expertise for credibility using podcast
- Scale credibility by leveraging content for frequent sharing - content multiplication
- Consistently share multiplied content in a way it can be easily consumed and shared - social media and blog posts
- Proactively grow digital network and/or content exposure
- Targeted exposure through campaigns, podcasts, blog posts, and other resources
- Help influence and close leads from other sources
- Improve other existing marketing campaigns

MEASURABLE OUTCOMES

12 months into his Influence Accelerator System he has experienced the following outcomes:

- Used podcast as persuasion and inspiration for referrals
- After first 3 episodes, new prospect listened to podcast and said "that's exactly what I want" and became client without JK having to "sell"
- This client was a fan too, and immediately referred others, and guess what, they too became fans and referred quickly attracting \$2.7 MM in AUM
- Improved closing of leads from Smart Asset - JK is getting all the business - leads aren't even meeting the other advisors
- Multiple opportunities pending from those referrals and large companies JK has infiltrated thorough referrals
- Made doing business during COVID much easier and successful

BE YOUR OWN LOUD