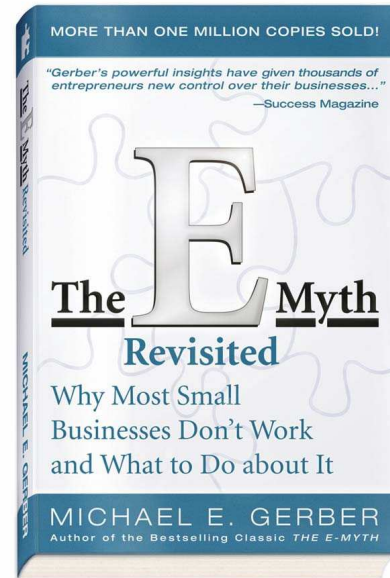


## Lead Generation Made Easy Workbook

### Introduction:

Our business philosophy is based on the E-Myth Revisited:

- Build your business to serve you.
- Think about **SYSTEMS** instead of people.
- Act as if you are going to replicate your business multiple times.



### **Seven Centers of Management Attention**

- We believe in looking at the whole business.
- One of the key functions of your business is **Lead Generation**.
- Must be integrated with the other business functions.
- Lead Generation is a **process** not an event.

## Lead Generation Made Easy Workbook

List your current lead generation activities:

 _____	 _____
 _____	 _____
 _____	 _____

What are your Lead Generation frustrations?

 _____	 _____
 _____	 _____
 _____	 _____

### Quick Definitions:

**Marketing** – \_\_\_\_\_ which focuses on your clients and target markets.

**Lead Generation** – \_\_\_\_\_ you use to attract the right clients to your business.

or

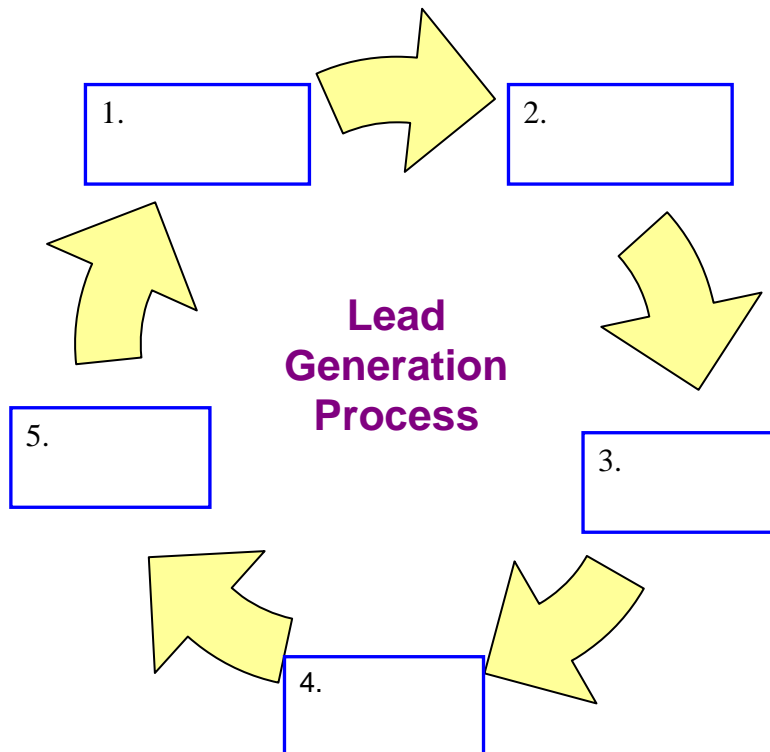
*The things you do to **PROMOTE** your business.*

## Lead Generation Made Easy Workbook

### ▶ What are the 3 Objectives of Lead Generation?

1. Short Term Leads
2. \_\_\_\_\_
3. \_\_\_\_\_

### ▶ Key components to a lead generation process.



## Lead Generation Made Easy Workbook

*First \_\_\_\_\_, then what.*

### 1. Choose a Target Market

Do you have a target market?

■ \_\_\_\_\_

### 2. Niche within your Target Market

Narrow your focus

▶ Characteristics of a high potential niche:

■ Posses required characteristics      ■ \_\_\_\_\_

■ \_\_\_\_\_      ■ \_\_\_\_\_

■ \_\_\_\_\_      ■ \_\_\_\_\_

### 3. Positioning

▶ Your value proposition:

■ How is your client better off by working with you?

■ Your \_\_\_\_\_

## Lead Generation Made Easy Workbook

### 4. Promotion

 **Core promotional strategies and tactics that work for advisors**

<b>Mass Marketing</b>	_____	_____
<b>a.</b> Direct Marketing	<b>a.</b>	<b>a.</b>
<b>b.</b> Advertising	<b>b.</b>	<b>b.</b>
<b>c.</b> Website Search Optimization	<b>c.</b>	<b>c.</b>

 **Best Practice of Elite Advisors**

- Niche Specialization

\_\_\_\_\_
- Client Referrals

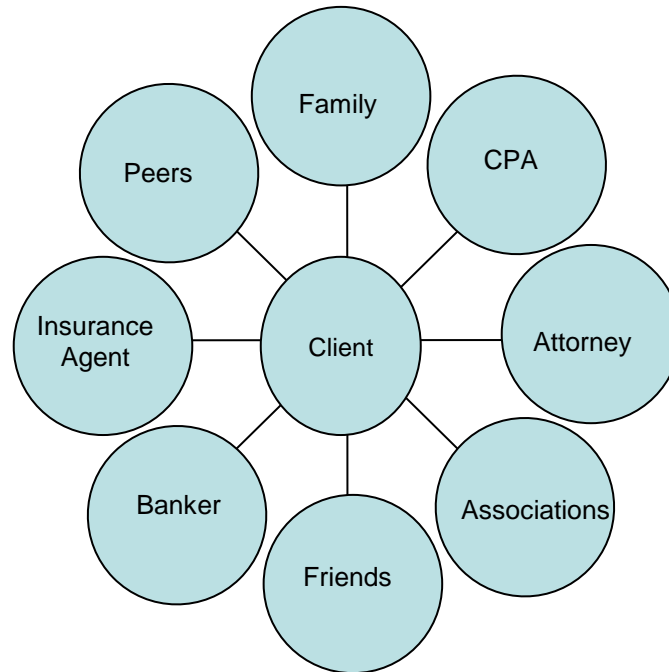
\_\_\_\_\_
- \_\_\_\_\_

\_\_\_\_\_

## Lead Generation Made Easy Workbook

▶ **Develop some referral tools.**

Referral Wheel



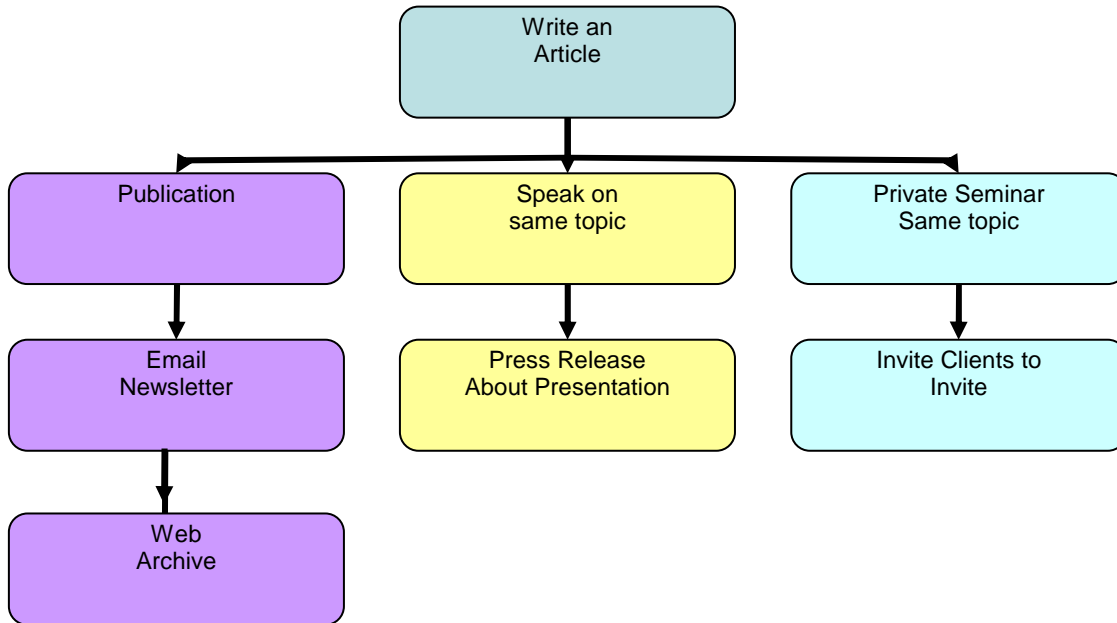
▶ **Referral Kit Contents**

- |   |  |
|---|--|
| <p><span style="color: green;">■</span> Introductory Letter</p> | <p><span style="color: green;">■</span> _____</p>  |
| <p><span style="color: orange;">■</span> List of Services</p>   | <p><span style="color: orange;">■</span> _____</p> |
| <p><span style="color: red;">■</span> _____</p>                 | <p><span style="color: red;">■</span> _____</p>    |

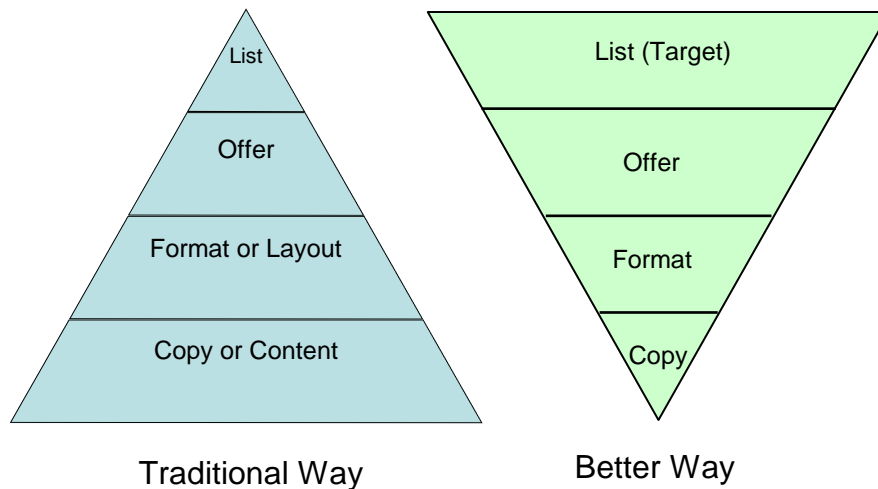


## Lead Generation Made Easy Workbook

### ► Think Integration and Leverage



### ► Remember: First WHO, then what.



## Lead Generation Made Easy Workbook

### Pull it all together - Example

Strategic Components

- ▶ **Target:** Medical Professionals
- ▶ **Niche:** Plastic Surgeons who own firms
- ▶ **Position:** Expert at providing consultative financial advice to plastic surgeons who own their own firm.
- ▶ **Promotion Strategy:** Writing → Speak at professional association → COI referral → Client referrals.

Tactical Components

- ▶ **Plan and Actions:**
  - Write an article published in trade journal
  - Speak at association meeting; same topic
  - Press release about speaking
  - Send article and press release to target COI
  - Partner with CPA who works with Plastic Surgeon firm owners
  - Article on website
  - Ask for referrals

### Your Take-Aways

- ▶ Lead Generation is a process, not an event.
- ▶ Develop your lead generation system.
- ▶ Always start with WHO.
- ▶ Have fun.

## Lead Generation Made Easy Workbook

### Renaissance Results™ Business Development Program

**The Renaissance Results™ Program** produces businesses that work, and owners who have more freedom. It is a one-of-a-kind business development system for developing a profitable, competitive, and growing business through practical application and implementation.

#### **WHO is a candidate for Renaissance Results?**

Small Business Owners who:

- Want to build a business that will work for them rather than because of them
- Work too hard for too little results
- Want to have more balance in their lives
- Know they need outside expertise to help them

#### **HOW does it work?**

Working with your certified and licensed Renaissance Consultant over the telephone, you will meet two or three times per month, covering twenty-one business development modules across these **Seven Centers of Management Attention:**



Leadership



Marketing



Money



Management



Lead Generation



Lead Conversion



Client  
Fulfillment

#### **WHY does it work?**

- Focuses on the fundamentals that make a business successful and profitable
- Provides insights and information through a collaborative relationship
- Enables tailored solutions, rather than just supplying cookie-cutter approaches
- Focuses on getting RESULTS, not just doing more work
- Advances your entrepreneurial thinking and personal growth
- Focuses on ideas that have strategic importance to your success

#### **WHAT are the benefits?**

- More quality free time to spend as you choose
- Increased profits and personal income
- Eliminate people problems
- More consistent business results