Asset Management Firms: 9 Steps to Generating High Quality Leads

Struggling to find new clients in today's remote work environment?

It doesn't have to be that way. INK's data-driven, digital lead generation system can help you micro-target your ideal clients, fill your pipeline with highly, qualified leads, and engage prospects faster and more cost-effectively than ever before.

Our model is proven to drive seven- and eight-figure results for financial services organizations, and it can help you fill your pipeline with new advisers and retail investors in 90 days or less.

Here's how it works:

1 Identify your most compelling offer

Lead gen campaigns work best when they're focused on a single offering. Start by identifying the product or service most likely to catch a financial advisor's or investor's immediate attention.

2 Create loads of content

Once you've decided on a focus, start creating a variety of useful and persuasive content assets around that offering. Don't limit yourself to one format, either. The more ways you can explain your offering, the better.

3 Build your list

Even if you have an email list already, tools exist today that allow you to target your ideal buyer with pinpoint accuracy and quickly augment your existing list with thousands of new prospects. With INK, you get access to millions of highly motivated prospects that have signed up to receive offers just like yours.

4 Deploy an automated email sequence

Use a multi-step, automated email drip sequence to deliver your core message and entice your target audience to download/consume the content you've created. Email is still the best way to build trust, establish authority in your space, and nurture new relationships with potential clients. INK's team of content creators, graphic designers, developers, and marketing strategists have created and deployed highly effective email campaigns for hundreds of clients.

5 Collect user data

Use A/B testing, click tracking, heat mapping, and other user behavior tracking tools to gain valuable insights into your core buyer's needs, wants, and preferences. Working with INK, you'll have 24/7 access to this data via an intuitive and detailed analytics dashboard, custom-built for your campaign.

6 Adjust the campaign as you go

Optimize your campaign (including content assets, email messaging/subject lines, landing pages, branding, and imaging) based on A/B testing results and user behavior metrics so that the campaign becomes more effective the longer it runs like yours.

7 Score your leads

Landing pages and other user-submitted forms allow you to gather basic information about your target audience (like job titles and organization type for advisors; or accreditation status and investment experience for individual investors). This information can then be used to score leads based on how valuable they are likely to be to your business, so you can prioritize who your sales team contacts first.

8 Retarget through multichannel ads

Leverage the wealth of advertising options on mobile web browsers and social media platforms to retarget prospects, allowing you to reinforce your message and stay top-of-mind.

9 Sharpen your brand and shorten your sales cycle

You now have a sizable cache of key content assets, optimized via testing and user behavior tracking, that can be deployed in future marketing initiatives for years to come. You also have heaps of invaluable data about your core buyer that can be used to sharpen your message, guide your sales process, and shorten the sales cycle.

Contact INK today to get started

INK uses its proprietary lead gen system to help financial services firms broaden their reach and attract new clients faster and in larger numbers than they ever thought possible. Contact us today to find out how you can start getting new clients in a matter of weeks.