

# ROADMAPPING

*Come with a goal. Leave with a plan to surpass it.*

MM RIA MARKETING  
GROWTH SOLUTIONS  
FOR ADVISORS



## WHAT IS IT?

Roadmapping is our unique strategic planning process for independent financial advisors and RIAs. The end result is a comprehensive marketing plan customized to reach your unique goals.

## OUTCOMES

If you were driving from NY to LA, you wouldn't just drive west and risk your time, energy & money. And without mapping your route first, there's no assurance that you'll reach your destination. The same applies here. Roadmapping ensures that you not only reach your goals but that you do so in the most efficient manner.

- ✓ **Clear Path**  
Turn confusion into coordination with a clear & direct path to success.
- ✓ **Saves Time & Money**  
Avoid wasteful spending from trial & error marketing. Do it right the first time.
- ✓ **Higher ROI**  
Produces the most efficient and effective strategy to reach your goals.
- ✓ **Protects Investment**  
Reduce your risk and confidently invest in just the strategies that will yield the best results.
- ✓ **Steady Growth**  
Implement strategies that continually get results and never worry where your next client will come from again.
- ✓ **Eliminates Guesswork**  
Stop trying to figure it out on your own and get the steps to success handed to you.

## WE DROP YOU OFF AT THE FINISH LINE



You want to get more clients but don't know where to start. Or maybe you're spending a lot of time and money on marketing with little return. Do you feel stuck?

**Imagine how much easier your life would be if someone handed you a game-plan for success. One that included the exact steps you needed to take in order to get more clients and accelerate growth.**

That's exactly what you get with Roadmapping. We do the legwork and drop you off at the finish line.

## A SMALL INVESTMENT NOW LEADS TO GREATER RETURNS IN THE FUTURE

Marketing is always a smart investment if it's done right. The problem is that a great deal of Independent RIAs thinks that they're saving money by doing it themselves. While it may feel this way initially, in the long-term you're actually wasting even more time and money on "trial & error" marketing than if you had invested in a Roadmap to begin with. This is because our marketing plans ensure your resources are invested efficiently and effectively so that **returns are maximized and missed opportunities are minimized.**

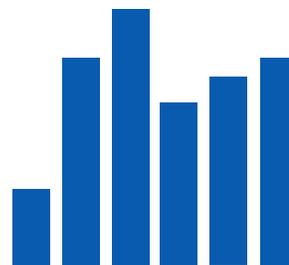
Avg. Amt. Per Month	DIY	With Roadmap	Difference
Hours	40	4	Saved 36 hrs/month
Dollars	\$3,000	\$1,500	Saved \$1,500 /month
ROI	\$2,340 (78%)	\$7,920 (528%)	Earned \$5,580 more/month (\$67K /year!)

*How much would your life improve if you made an additional \$5,580 per month?  
What would you do with an extra 36 hrs/month?*

↑ **238%**  
increase in monthly **ROI**

↓ **90%**  
decrease in **hours** spent per month on marketing

↓ **50%**  
decrease in **dollars** spent per month on marketing



# Case Study: Opt-in Texts

## Opportunity

Pamela is an independent advisor who gets quite a bit of recognition and exposure. She's frequently interviewed, regularly appears in Barron's and has multiple speaking engagements a year. While this results in a lot of new clients, the problem is that she was only hearing from people who were already motivated to take action and immediately set an appointment.

What about all those prospects who read her interview or viewed her presentation but didn't immediately take action? By the time they were ready to move forward, she wasn't top of mind anymore.

There was a lot of missed opportunity for lead generation. To address this, she needed a to capture those "warm" leads and continue to engage them.

## Solution

During her interviews or speaking engagements, Pamela would offer the audience something valuable or helpful, like a retirement planning checklist or a copy of her presentation slides. To receive it, they needed to text a number and then give their email address.

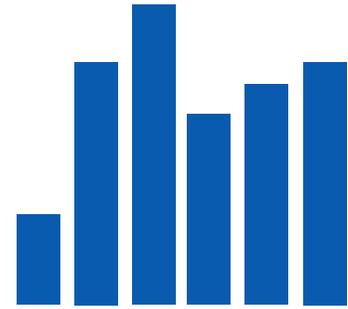
For example, "Text 'LMCHECKLIST' to 33444 to get my list of retirement must-haves"

Once they enter their email address, the freebie is auto-delivered and the prospect is added to an email list, where they subsequently begin receiving a relationship-nurturing email sequence.

## Results

Previously, Pam was getting about 1-2 leads per month from all her speeches, guest appearances, and interviews. This generated about \$45K/year in new client revenue.

After adding opt-in texts, she's now averaging **6 qualified leads per month** and **\$225,000/year more in new client revenue**.



↑ **\$225k/year**  
increase in *new client revenue*

↑ **400%**  
increase in *qualified leads*

↑ **500%**  
increase in *new client acquisition*

# Case Study: Email Nurture

## Opportunity

Linda is an RIA who wanted to generate more leads. During our roadmapping session, we discovered that her lead-generation strategy was very effective, and she had built an email list of over 500 qualified leads.

However, even after multiple follow-up emails, her **conversion-to-appointment rate was only 2%**. She reasoned that since such a small amount were taking action, she needed more leads to get more clients.

"Linda," I said, "you don't need more leads, you just need a higher conversion rate." Instead of developing additional strategies to get leads, we needed to make what she was already doing more effective by improving her follow-up.

Like many other financial advisors, Linda's emails were focused on sales and getting leads to make an appointment.

Therefore, her emails provided little to no value. She inadvertently trained her subscribers to ignore them.

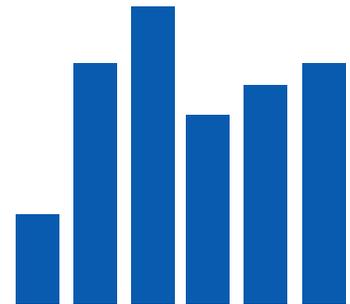
## Solution

We sent a five-email sequence that focused on being helpful instead of aggressively asking for anything in return.

This allowed her to establish credibility, pose herself as a valuable resource and build a trusting relationship.

## Results

Almost immediately, she saw a boost in results. Her conversion rate jumped from a puny 2% to **a whopping 25% in a month!**



↑ **2% to 25%**  
*increase in conversions to appointments*

↑ **4 to 16**  
*increase in yearly new clients acquisition*

↑ **\$90,000**  
*increase in annual revenue*

# Case Study: 3x Clients in One Year

## Opportunity

To help Richard, a CFP & financial advisor who was struggling to get traction with his digital marketing efforts.

During our roadmapping session we learned:

- He held a lot of educational seminars that generated leads & clients but took a lot of time and energy.
- His biggest source of leads were referrals but he didn't have an efficient process in place to consistently request referrals, thus, he didn't get nearly as many referrals as he could have.
- He got a lot of website traffic but little to no leads from it.

## Solution

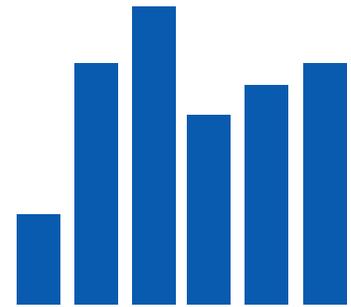
a. To leverage Richard's successful seminars, we converted them into webinars. This way, he was able to record a seminar once, then scale his efforts. He generated just as many leads and new clients from the webinars, but **saved at least 20-25 hours per month of his time**.

b. To maximize referrals, we set up an efficient process to effectively request referrals. He now gets **4-5x more referrals per month**.

c. During the audit portion of Roadmapping, we discovered he did not have any lead capture opportunities on his website. He had a contact us form but this only works for "hot" leads. In order to capture "warm" leads and then nurture them into making an appointment, we added a free "risk" calculator to his site and asked for an email address in exchange. **This boosted leads by 6x**.

## Results

Overall, Roadmapping increased Richards **leads 10x**, saved him about **36 hours per month of his time**, and **tripled his new client acquisitions within a year**.



↑ **900%**  
increase in *qualified leads*

↑ **36 hours**  
increase in *monthly time savings*

↑ **300%**  
increase in *annual new client acquisition*

# TESTIMONIALS

*"The Roadmap we created with MMRIA is making this Digital Marketing thing easy and efficient. Above all, we spend less time and money and **get 10x the results**. Thank you!"*

-Steve B., Independent RIA

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*"I received an \$8K/month marketing proposal from another agency. Through Roadmapping, MM RIA determined that I didn't actually need everything the other agency was proposing and **created a plan that was less than half the cost AND produced better results**. Feel like I dodged a bullet!"*

-Jim K., Independent RIA

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*"MMRIA is the best when it comes to helping you come up with a plan of action that gets results. The Roadmap we created together helped me accelerate my lead generation from 1 or 2 qualified leads per month to about **1 or 2 per day!**"*

-Kimberli G., Independent RIA



[CLICK HERE TO SCHEDULE YOUR COMPLIMENTARY CONSULTATION](#)

# HOW IT WORKS

## STEP 01

### DISCOVER

We shape your digital marketing plan based on your unique goals and needs.

## STEP 02

### DESIGN

Move from goals and needs to an actionable step-by-step plan to reach and surpass your goals.

## STEP 03

### DELIVER & IMPLEMENT

Take action, implement the easy-to-follow plan, quickly and efficiently get more clients.

## ROADMAPPING

# FAQS

*"A man without a plan for the day is lost before he starts."*

*Lewis K. Bendele*

### HOW MUCH DOES THIS COST AND IS IT WORTH IT?

Everyone has unique needs and situations therefore the investment for Roadmapping varies by case. They range from \$1,500 up to \$10,000.

And yes, it is worth every penny! In fact, we think it's a steal. It's a small price to pay for something that will save you a ton of time and money in the long run and protect your investment.

### HOW IS THIS VALUABLE WHEN I COULD GET A FREE PROPOSAL FROM SOMEONE ELSE?

**• They're going to rush it:**

I don't care what anyone tells you, if someone is creating a proposal for you, for free, they've rushed it. They haven't explored all the options, and while their concept may be standard for them, it's not necessarily the best solution for your business.

Roadmapping lets us explore all the possible solutions to find one that solves the problem while advancing your overall business goals.

**• De-risks your investment:**

Have you tried marketing before and it didn't work? Have you been burned in the past by another agency? That's probably because the proposal was shoddy and rushed.

Roadmapping makes sure that once we have the project roadmap and estimate, they're both accurate. It's a

safeguard against wasting money on strategies that won't get the best results.

**• It's not grounded in business value:**

Anyone can give you an estimate, but what's important is finding a solution that advances your business goals. Roadmapping gives us a chance to step back, look at the project in the context of your overall business, and figure out the best way to achieve your goals.

### I ALREADY KNOW WHAT I WANT, CAN'T YOU JUST SEND ME A PROPOSAL?

Are you sure that's the best, most cost/time efficient solution for you? Not all marketing solutions will generate the same results for every business.

The trick is knowing the recipe that will work for your business. And roadmapping is how we will create the perfect recipe for growing.

Basically it comes down to this: we can't, in good faith, start a project with anyone on the assumption that that's the best solution for them.

### WHAT DO I DO AFTER I GET MY ROADMAP?

With each Roadmap we will include our proposed cost and time frame for implementing the plan for you. You can choose to work with us, implement our solutions by yourself, or bring your roadmap to another agency.

### HOW LONG UNTIL I START SEEING RESULTS?

We've seen clients get 300-500% more qualified clients in as little as 2-3 weeks. Every advisory firm is in a different stage, so it really depends on your unique situation. However, you can reasonably expect to see tangible results in about 4-5 weeks.

### ARE YOUR SERVICES COMPLIANT WITH SEC REGULATIONS?

Absolutely. Members of our team are former financial advisors and fully understand the critical importance of compliance. We created an efficient, but strict approval process for everything that the public will see. Nothing will see the light of day until you and your compliance department have approved it.

### WHAT MAKES MM RIA DIFFERENT FROM OTHER AGENCIES?

For one, members of our team are former financial advisors who transitioned into marketing. So, we have unique insights into what your business needs to flourish. Add that to our decades of marketing experience and we can make any business a success. So you can rest assured we've got the skill set but what's a business without a mission?

Our mission is to build an authentic, trusting relationship with each and every one of our clients. We take the time to get to know you, listen to your struggles, and create the most suitable plan based on your individual needs and goals. Collaboration, attention to detail, innovation, accountability and knowing our clients well are what make us different.

### THIS SOUNDS AWESOME. HOW DO I GET STARTED?

Great! We're excited to help you get more of the right clients and quickly achieve your goals!

To get started, click the button below to schedule a complimentary consultation and talk about next steps.

[START HERE](#)