

Introduction

The purpose of this Facebook Ads Blueprint for Financial Services is to walk you through exactly how we generate leads, appointments and sales for the Financial Services sector.

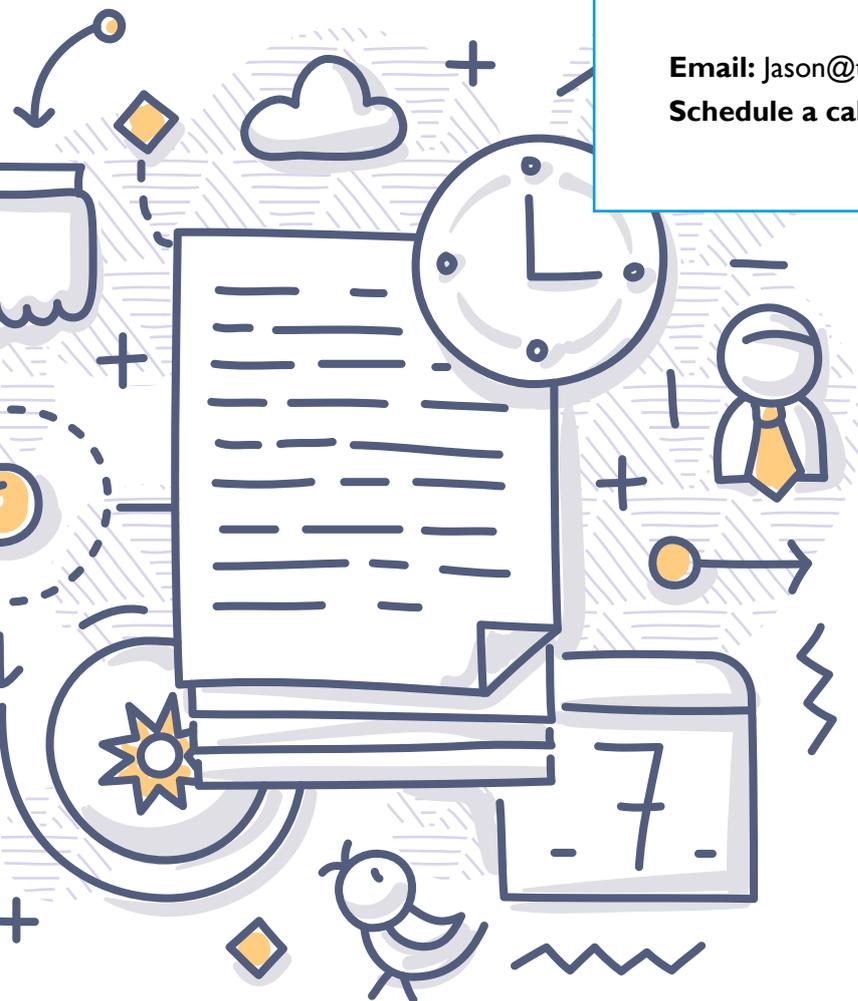
I'm sure you'll have lots of questions therefore please do not hesitate to contact me.

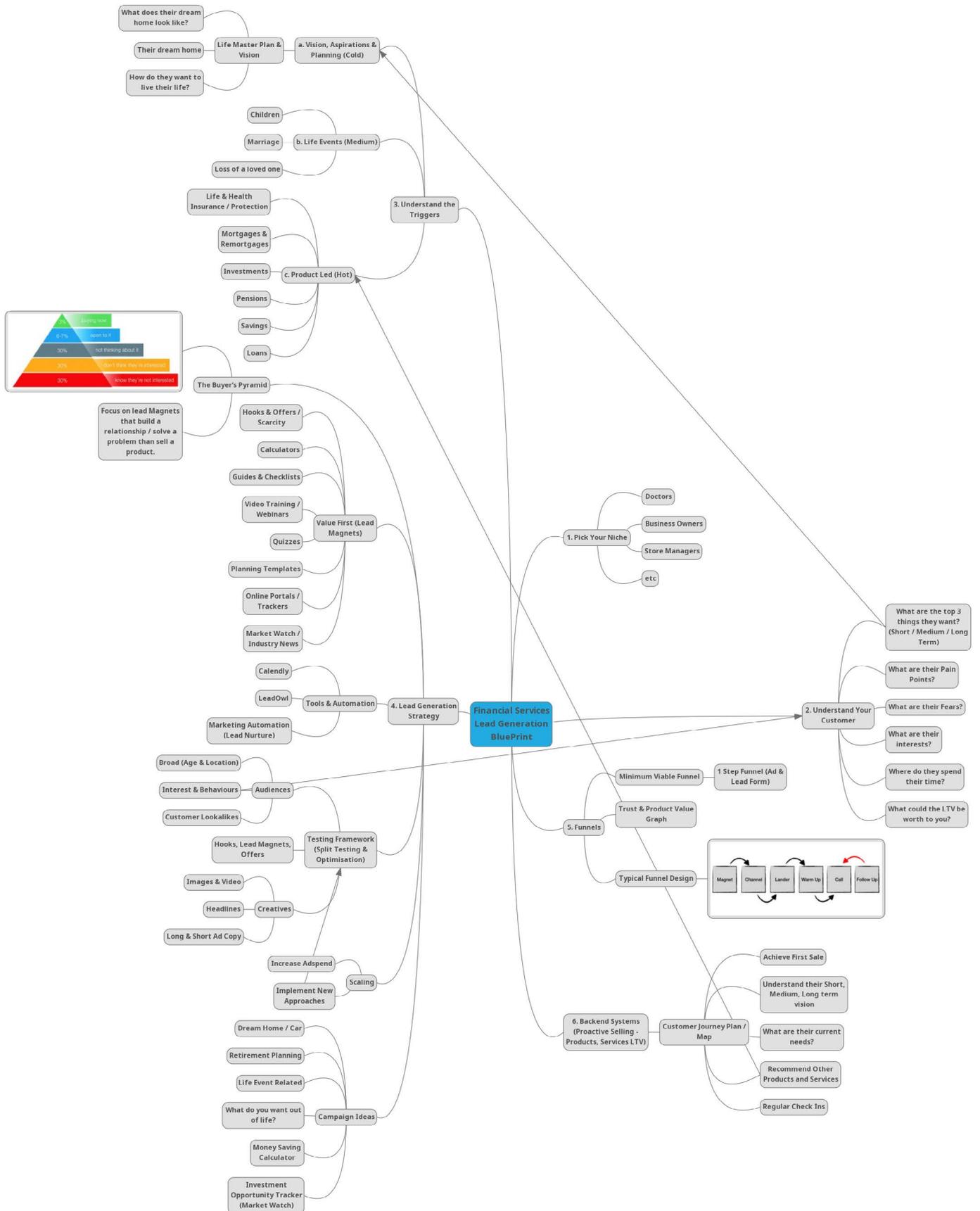
Yours Sincerely,

Jason Cooper

Email: jason@theleadswrangler.com

Schedule a call: <https://LeadsWrangler.as.me/>





STEP 1:

Pick Your Niche

THE FIRST STEP IS PICK YOUR NICHE.

Rather than going after every man and his dog, think about who your ideal customer would be. When running Facebook Ad campaigns they prefer it if you can be as targeted as possible. You'll also be able to be more specific with your offer to attract people in.

Whether it's Doctors, Business Owners or Senior Managers - pick one and ensure you understand as much as possible about them.

FIND OUT:

- What are the top 3 things they want (short / medium / long term)
- What are their pain points?
- What are their fears?
- What are they interested in?
- Where do they spend their time?
- What could the Lifetime Value (LTV) be worth to you?



DO YOUR RESEARCH.

Even interview people to find out as much as information as possible.

This information will be pivotal to your Facebook Ad campaigns. This is how you'll be able to enter into a conversation with them and start to build a relationship.

STEP 2:

Understand The Triggers

Here are the Triggers when someone may need help from a Financial Advisor.

WE'VE SPLIT THEM INTO 3 CATEGORIES:



**VISION,
ASPIRATION &
PLANNING**
(Cold lead)



LIFE EVENTS
(Medium lead)



PRODUCT LED
(Hot lead)

VISION, ASPIRATION & PLANNING (COLD LEAD)

These are leads where people are not really in the market for anything currently - but it's getting them to think about what they do want out of their life. Whether it's the next 5, 10, or 20 years.

Especially if someone was to tell exactly what they wanted; their dream home, lifestyle and what they want their retirement to look like.

These types of leads are generally colder and cheaper to obtain on Facebook Ads as they are not in a position to buy at this stage, however if you start the conversation it could open many doors for you in the future. It's all about relationship building and then being top of mind for one of the other triggers mentioned below.

LIFE EVENTS (MEDIUM LEAD)

This trigger is when a significant life event has occurred. For example:

- Marriage
- Children
- Loss of a loved one
- Think of buying their first house

When these events occur, people tend to seek out advice on future financial planning. With the right hook or offer these leads could be good potential customers.



PRODUCT LED (HOT LEAD)

These are the people who are already in the market for a certain product or service. Whether it be Life Insurance, Mortgages, Investments, Pensions etc - they will most likely have done some research and are ready to buy sooner rather than later.

Facebook's targeting options are very good however they won't tell you who is ready to buy now. Using demographics, interests & behaviour targeting along with a compelling offer or hook within the ad copy will help draw these people out.

STEP 3:

Lead Generation Strategy

YOUR FACEBOOK LEAD GENERATION STRATEGY IS GOING TO START TO PIECE EVERYTHING TOGETHER.

Too often when businesses use Facebook Ads they focus too much on trying to sell Top of Funnel.

Unless you have an amazing offer and a well known product it will be hard to sell with a typical buy now ad (However it can be done).

Remember people don't go onto Facebook to buy anything, they go on there to socialize and see what their friends and family are up to.

Therefore it's important to start focusing on building a relationship with them. Having done your customer persona research, what could you offer them that will solve a small problem that they are having?

A lead magnet is where you offer something of value in exchange for some basic contact details such as name, email address and even a phone number.

A LEAD MAGNET COULD BE ANY OF THE FOLLOWING:

- Ebook or guide
- Savings calculator
- Video training Free
- consultation
- Templates

Once you've provided some initial value you'll be able to build upon this and nurture them further. Within the financial services industry it's all about getting that booked appointment (rather than just generating the lead). You'll be able to achieve this with short and longer funnels - depending on the product or service you are selling.



STEP 4:

Funnels & Campaign Ideas

A LEAD MAGNET IS TYPICALLY THE START OF A FUNNEL.

A Funnel will take a prospect from a cold lead into a warm lead through a series of touch points. Funnels come in all shapes and sizes including email, videos, podcasts and more.

Some funnels can be very long (Depending on the product or service you are trying to sell). Typically if the product requires more investment then more trust will need to be built. You can therefore do this by building a longer funnel which educates people further.

The best way to design a funnel is to look at your existing sales process. Map out the steps and typical questions, answers and objections and use this as a starting point.

The length a funnel will vary but I don't believe in building big funnels for the sake of it. They will require testing. A good start point is to create a minimum viable funnel and then build it out from there.

A MINIMUM VIABLE FUNNEL WILL TYPICALLY INCLUDE THE FOLLOWING STEPS:

- 1. Facebook Ad**
- 2. Lead Form or Landing Page**
(To provide the lead magnet)
- 3. Thank You Page**
(With online booking).

Once you have tested this initial funnel out you'll be able to see if it needs to be made longer. You could drip feed more information via email for example before asking them to book a call with you.

In terms of examples. Anyone selling Life Insurance could get away with a very short funnel. With Life Insurance people typically go online and sign up or have a conversation with a broker.

YOUR FACEBOOK LEAD GENERATION STRATEGY IS GOING TO START TO PIECE EVERYTHING TOGETHER.

Where as if they were to take out a Mortgage there will be a lot more steps and touch points involved before they make a decision.

Here are some example Campaign ideas that can be used with long and short funnels:

- What does your dream home look like?
- What would you like to do in your retirement?
- Life event related (Child, Marriage)
- Money saving calculator
- Investment opportunity tracker



STEP 5:

Facebook Ads Framework

NOW THIS IS WHERE IT GETS EXCITING.

We now want to implement everything we've gone through in the guide to date.

We've worked with a lot of Financial Advisors & Business Owners and those that have tried Facebook Ads previously have not given it long enough for it to work or gone about it the wrong way.

One thing to note. It's important to know the following information before starting any Facebook Ads campaign.

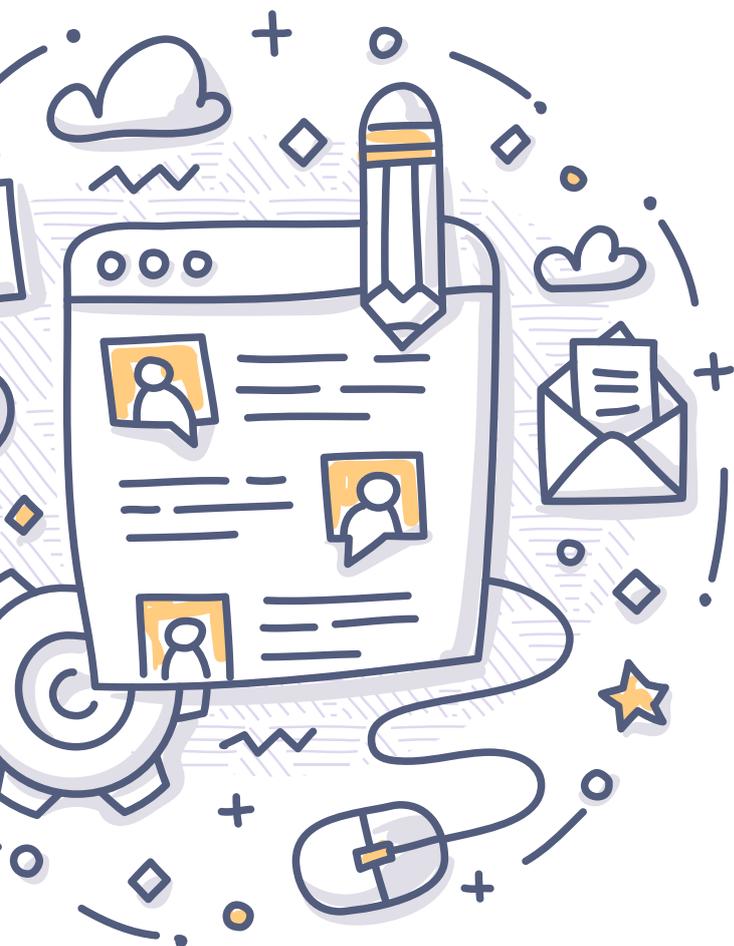
- Average order value
- Customer Lifetime value Sales
- conversion rate.

This information will help you determine what you should be paying per lead in order to remain profitable.

When you're just starting out budget might be limited and there is a lot of emphasis on getting the cheapest lead possible. Whilst I agree with that in testing - it should come down to the quality and conversion rates. A cheaper lead isn't always a better quality lead.

Also anyone starting out on Facebook Ads needs to give it 3 months to test a number of approaches before they really can scale their campaign.

Facebook provides us with many different targeting options and it won't be clear initially which one will work the best without testing.





STEP 6:

Backend Systems & Proactive Selling

ONCE YOU'VE ACHIEVED YOUR FIRST SALE IT'S IMPORTANT TO ENSURE YOU HAVE SYSTEMS IN PLACE TO SEE WHAT OTHER PRODUCTS AND SERVICES YOU CAN OFFER TO YOUR CLIENT.

I advise to try and create a Customer Journey Plan / Map. This is basically a list of products or services a customer might need depending on where they are in their life.

You already know what you can offer. You should focus your attention on understanding your customer as much as possible and then take a proactive approach to what they might need in the short, medium and long term.

For example someone who has just purchased their first house, what else will they need to think about in the near future? What products and services could you offer them?

It is important to focus on value. Let your value do the selling. You'll find that this approach will win all the time and your customers will be coming back to you.

Luckily with technology at our disposal you can automate a lot of the heavy lifting. It's all about identifying those warmer leads, getting them on a call and adding as much value as possible.

Don't miss the opportunity by stopping at the first sale.

I HOPE YOU HAVE FOUND THE FACEBOOK ADS BLUEPRINT FOR FINANCIAL SERVICES USEFUL.

At Leads Wrangler we focus on building profitable lead generation systems for Financial Advisors and Business Owners.

Our aim is to get you as many qualified appointments that you can handle by putting in key systems and processes that will do the heavy lifting for you.

I'd like to invite you to a FREE discovery call where I'd like to personally answer any questions you have on the Facebook Ads Blueprint for Financial Services and how it could be used for your firm.

This call is strictly focused on value and providing you with more insight.

Click the following link below to get access to my calendar and availability:

[Book a Strategy Call with Jason](#)