



6 Top Strategies That Maximize Qualified Appointments, Create More Clients, and Close More Index Annuity Sales for Virtual Advisors

How Advisors Are Making a Switch to Virtual and Thriving in the Age of the Coronavirus Pandemic

6 Top Strategies That Maximize Appointments, Create New Clients, and Close More FIA Sales for Virtual Advisors

The coronavirus pandemic has completely disrupted our industry in ways we've never seen. And that's in just mere weeks. Between the rising health risks and uncertainty of what's ahead, many advisors are readapting and taking their firms 100% online.

If you're looking at or will be doing virtual workshops, use these 6 must-know strategies for creating clients and selling more FIAs as a virtual advisor.

These tips are courtesy of our team, who has 70+ years of combined industry experience with working with advisors across the country, and of our Inc. 500 Marketing company partner. For 30+ years, our Inc. 500 partner has helped small businesses, just like you, expand and reach tens of millions of dollars in new business.

Be sure to incorporate these strategies as you plan out your digital workshops, so you can get the most bang for your buck and drive more results.

And when you're finished reading this, call us to ask how our support, expertise, and partner's business scale will start transitioning you to a virtual firm *immediately*.

1. Understand the difference between face-to-face workshops and presentations online.

We run hundreds of online webinars each year for different purposes. It's a completely different ballgame from when you present in person.

Among consumer audiences, people go online for two reasons: to learn or to be entertained. Their attention spans are also much shorter online than they would be in a physical setting.

In a face-to-face workshop, your audience will follow certain niceties, like not leaving until it's finished. But if your presentation isn't on point or maintaining their interest, they'll quickly drop off.

It's a given, but ensure your presentation is fully attuned to this so you can make the most of every opportunity.



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2. Targeting matters more than ever.

The retirement investors whom you aim for, and how you target them for your virtual events, sets the stage. They determine whether or not you'll have the right prospects from the start.

Many IMOs and marketing companies are pushing this. But targeting prospective clients via Facebook and other social media advertising **isn't the end-all, be-all** of keeping your marketing costs low and your results effective.



A strategic mix of digital marketing & other strategies is MUCH more effective. Why?

Because social media has changed dramatically. Back in October 2018, Facebook stopped letting advertisers target prospects based on crucial marketing demographics, including financials and residence. This was due to government lawsuits and other liability risks that Facebook simply decided to unload. Steadily, other social media platforms have been following suit.

A combination of digital marketing that still targets relevant demographics, and other marketing strategies that don't exclude these important details, goes a much longer way toward maximizing your dollars and generating sales.

If you're starting virtual workshops, make sure your targeting is on point from the start. Otherwise you're wasting money!

3. Don't neglect your credibility online, a *must-have*.

Think about it. Instead of an in-person event, you're inviting people to join you for a virtual presentation.

While they're already researching you online, your focus on building relationships in a digital environment makes it much more likely they will scour the Internet for your credentials, your credibility, and the experiences of other investors.



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This is what marketers mean when they refer to your “digital presence.” That covers many online resources: your website, your LinkedIn profile and Facebook business page, your other social media pages, your appearances or quotes in online articles, what clients say – good and bad – about their experiences with you, and how you position your services as well as insurance solutions.

If your digital presence doesn't match up with the professionalism and knowledge that you show in your virtual workshops, you'll miss out on client relationships and on more FIA sales. We've worked with hundreds of advisors, and this happens even when your clients aren't giving you negative feedback about what they found online about you. Why miss out?

Now, what do you think your clients would say if you were an independent advisor, but you were still part of a national financial brand that's been on U.S. News Money, CNBC, MarketWatch, Fox Business Network, and many other outlets that are household names to your clients?

That could change impressions quickly. One immediate upshoot of our program is you'll associate with a brand that gives you that amazing third-party credibility starting on Day 1.

4. When conducting virtual workshops, have a clear purpose for your presentation & clear calls to action.

When retirees and pre-retirees attend your virtual workshops, it's an investment of time on their parts. They chose to come hear from you instead of spending time they'll never get back on other important personal matters.

At the beginning of your workshop, state clearly what your prospects will learn. Your attendees will appreciate the clarity. Also, have a clearly defined appointment-setting process, both during the events and in your follow-ups.

At strategic points in your workshop, ask clearly for what you want from your audience: a personal appointment with those who truly need your time and expertise. Don't be afraid to tell unqualified prospects that they shouldn't feel obliged to meet with you.

Your virtual workshop close should also be carefully structured to set appointments, too.



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5. In the workshop, emphasize the pain-points that you are uniquely qualified to solve as an insurance-only advisor or financial advisor offering annuity solutions.

As an agent or financial advisor offering fixed annuity solutions, you can solve a variety of unique problems, including protecting assets and building a guaranteed income stream that clients can't outlive.

This is just as important a point for virtual workshops as it is for in-person seminars. Provide strong value to your audience and show them the pain-points you are uniquely equipped to solve as a financial professional. Demonstrate some of your expertise and knowledge in the virtual workshop, giving your attendees a sense of what they can expect when they commit to a personal appointment with you.

Don't use any bait-and-switches in your workshops, such as product pitches or mentions of overaggressive projections of annuity growth. They'll result in nothing but disappointments for your clients, as it can create false expectations from the start.

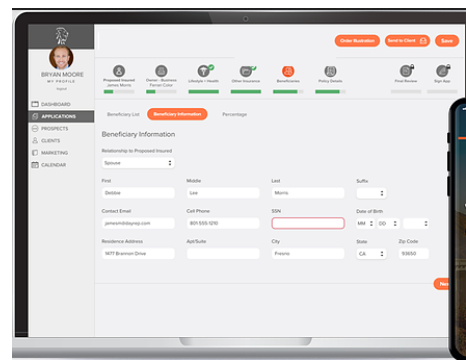
You want to set as strong a foundation as possible. Create an opportunity for your prospects to feel those angsts – and set yourself up to solve them as their trusted advisor.

6. We're in a new age. Make your annuity application process as painless and worry-free as possible.

This is just a small taste of how Safe Money and our Inc. 500 Marketing partner will help you transition to being a virtual advisor quickly, efficiently, and easily. But as you set appointments and start creating sales opportunities, don't forget about the backend.

The actual application process should also be virtual.

We don't know how long the coronavirus pandemic might go on for, and experts vary across the board in their opinions of length. Applications are already painful. This process must be as easy and convenient for your new clients as possible.



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Thankfully, many insurance companies now provide you with the opportunity to submit e-applications. Or in other words, you can complete your entire annuity application with your clients online. You can find the insurance company's e-app process through their respective sales portal.

Take advantage of this resource. That way your clients don't ever have to step into your office in order to work with you, and you can create new relationships as well as write more business from the safety of your home. Your clients will appreciate your consideration for their health as well.

For your convenience, our sister company, Safe Money Resource, has strong relationships with top insurance carriers that have easy e-application processes. Our sister brokerage also has access to exclusive annuity products that less than 2% of all fixed annuity distribution has access to. See what these unique solutions can do for your clients' needs.

When you call, ask us how about our sister company can help you take your business 100% online and simplify this application process for your clients.

About Safe Money Broadcasting

Since 2011, we have helped hundreds of advisors across the U.S. grow their firms and increase their insurance business. Just for you, our team has put together a complete program that lets you take your business 100% online, from prospecting to closed sales and new client relationships.

You'll receive marketing support from a Inc. 500 Marketing partner, where we've negotiated and created everything already on your behalf. What also awaits you in this program?

A completely scripted-out presentation and tools that you can use with virtual workshops quickly. Universal sales tools that let you close sales with ALL your relationships: prospects, lead generation, referrals, and cross-sells with existing clients. Everything you need to be successful in this new, virtual age is here!

Ready to get started? Call us at 305-680-0940, ext. 109, for more information or next steps!

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