

## Case Study: 33 New Appointments within 30-days

### The Problem

Demond is a financial advisor for a large financial services organization, and he was struggling to close new business since he wasn't able to get consistent meetings set on his calendar. He was doing what most other financial representatives do, which was to reach out to his warm market (family & friends), but, as we all know, that market runs out **quickly**, so he had lost a lot of hope in regard to **HOW** he would find new prospects to target. In his words, *"I would close business here and there because I had satisfied clients who would refer me to people, but that was my only means of doing business."*

He literally had essentially **zero** "new" prospects in his pipeline, with one average meeting per week (at most), and he constantly felt the frustration of knowing that he was barely keeping himself afloat. Demond knew he needed a change, so he made the decision to become a Done-With-You service client to finally build out a strong pipeline of **qualified** prospects & leads.

### The Solution

After only three months of working together, Demond has received literally **617 responses** from target prospects on LinkedIn, made 823 new 1st-Degree connections, and this has led to him having over 250 qualified leads now within his pipeline. These numbers have led Demond to having months like August 2021 where he has booked **33+ meetings** that all came from LinkedIn conversations, and the momentum is only growing.



617 responses

He is now seeing the effects of compound interest in regard to his prospecting, and he knows this is only the beginning. Demond also understood that online prospecting goes in 3 stages:

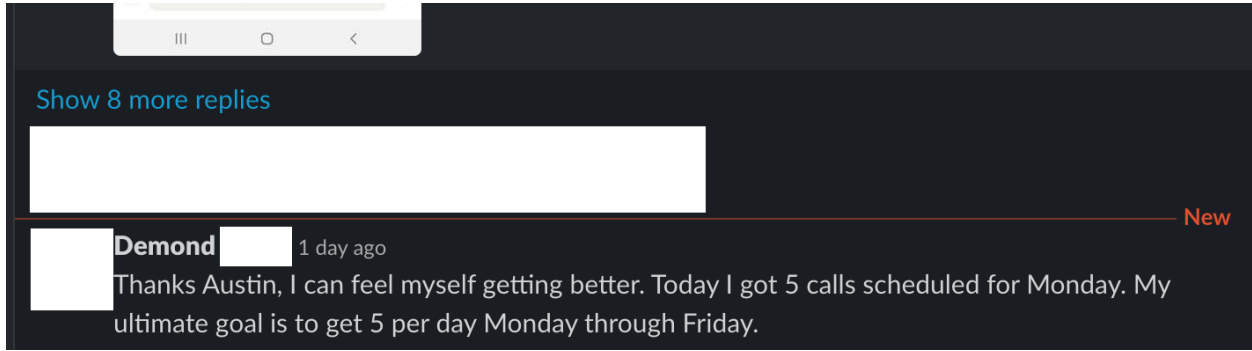
1. Start sending out weekly Connection Requests and Messages on LinkedIn which create many conversations on the platform.
2. Set up weekly meetings with prospects from LinkedIn to become familiar with getting outside of your warm market.
3. Begin closing business from these prospects on LinkedIn.
  - i) Do not expect to close business immediately. It takes some time to build rapport & trust online, but if you stay consistent & develop from month-to-month, results will come.

As Demond said, *"I didn't know how to respond to people over social media even though I had no issue communicating with people face-to-face. I had to make a total paradigm shift in my thinking. The Done-With-You service taught me that you must have a systematic approach in the social media realm."*

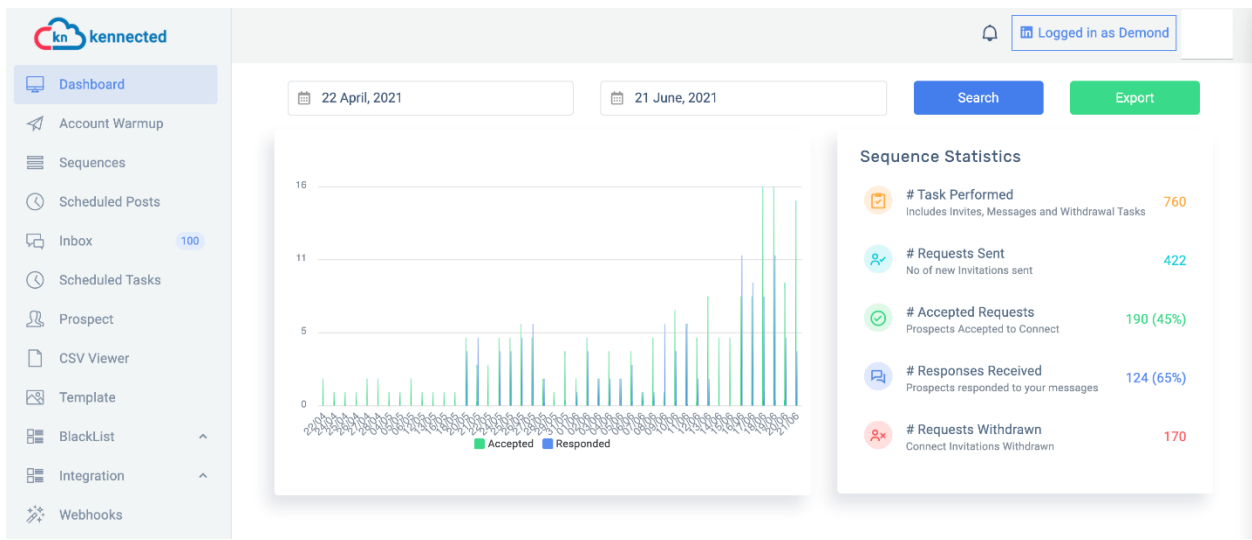
If you're ready to start building your own pipeline of qualified leads, [click here](#) to get started!

**Client Results Screenshots:**

**5 meetings set in a day for Demand**

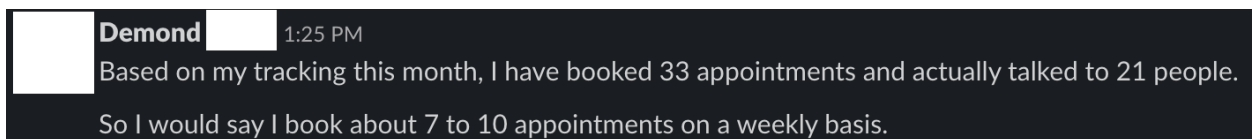


**Demand's prospecting performance**



1-2 accepted LinkedIn connection requests per day and 0 new responses on LinkedIn, on average vs. 5-6 accepted LinkedIn connection request per day and 4-5 new responses per day, on average

**33 new appointments for the month of August 2021**



## The Process

1. We first got a better understanding of Demond's Target Market. Since he is a Military Veteran, and understands other Veteran's needs, as well as the industry jargon (terms, language, etc.), we decided that this would be a good Target Market for him to prospect on LinkedIn.
2. Next, we updated & refined his LinkedIn profile to make sure that his entire profile (Headline statement, Banner image, About section, etc.) all reflected **HOW** he could be of value to any Veterans that he comes across on LinkedIn, as well as to establish his professional brand.
3. Third, we set him up with his own lead generation software account so that, rather than manually sending LinkedIn Connection Requests one-by-one (which is boring & time-consuming), he could automatically send out daily Connection Requests to his Target Market without lifting a finger.
4. Fourth, we put together messaging scripts to use for his LinkedIn outreach, and started his lead generation account sequences to immediately get him in front of prospects on a daily & weekly basis.
5. Fifth, we set him up with a free Customer Relationship Management (CRM) tool (Hubspot) and integrated it with his lead generation software account so that **ALL** of the contact information from his LinkedIn prospects was automatically added into his CRM tool.
  - i. Plus, we taught him how to create a follow-up reminder for each qualified prospect so that **NONE** of his prospects "slipped" through the cracks to end up being completely forgotten about going forward.
6. After all onboarding (steps 1-5), he attended our bi-weekly Financial Advisor Community group training sessions, asked for weekday support over Slack (a messaging app) on how to respond to prospects when he was unsure what to say, as well as we had at least one monthly call with Demond to get feedback on which messaging scripts on LinkedIn he needed to change to better connect with his Target Market of Military Veterans. Our team also monitored his lead generation account performance on a weekly basis to notify Demond of any adjustments that needed to be made in his lead generation account to get him optimal results.

## The ONE Attribute We NEED From All Clients

Ultimately, Demond knew this service would create results for him and he had the **ONE** key ingredient that we require of all clients: **patience**. When it comes to online prospecting, building momentum takes a bit more time since you cannot rush building rapport with prospects.

If you're willing to commit to the process for 2-3 months, you can absolutely start seeing consistent results. To summarize, if you expect immediate results, this service is **NOT** for you.