



# **6 High-Value Clients in 6 Months Case Study**

**LEADGOALSACCELERATOR.COM**

## Background

Brian transitioned out of the military via SkillBridge and has been a financial advisor for 2 years before joining us. The military gave him a tenacious work ethic. We just needed to identify the areas in his business that warrants his attention.

## Challenge

Brian wanted to build a steady stream of qualified leads outside of his existing client base. The goal is to set 5 additional meetings per week and 1 high value client per month, while only committing 1-2 hours/day to achieve this.

## Solution

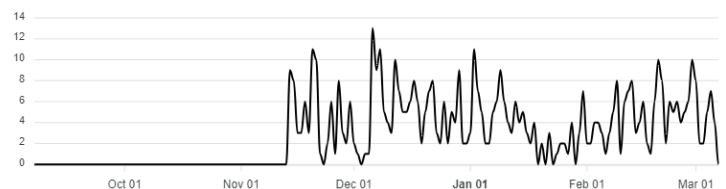
- Create marketing plan and refine targeting criteria
- Build an integrated outbound system to only reach his desired demographic
- Devote Brian's time only with engaged conversations in his target demographic

## Net Effect

- **Focused Outreach:** Only connect with the ideal client profiles (ICPs)
- **Time-bound:** Daily work that drive the business forward contained to 1-2 hours per day
- **Scalable solution:** Automated and integrated system that can scale with the business

## Numbers

- ✓ 2290 connection requests sent
- ✓ 1961 LinkedIn messages sent
- ✓ 1166 accepted invites
- ✓ 514 responses generated
- ✓ 5 additional meetings scheduled per month (ongoing)
- ✓ 6 new clients acquired



## **In Brian's Words**

**1. What was the business challenge you were looking to solve when we first started speaking?**

**Brian:** I was trying to have a stream of prospects acquired through passive means. I was hoping to generate leads outside of prospecting with my clients. I was also seeking to target a particular population that I have experience working with.

**2. Why was it important?**

**Brian:** It was important for me to schedule about five additional meetings per month outside of my normal business activities to increase my production and revenue.

**3. After working together for 3-6 months, what were some results that either solved or are accelerating towards solving that business challenge?**

**Brian:** After ramp up, I'm starting to schedule roughly 5 additional meetings per month and gained a total of 6 new clients. As momentum has been building, it seems this will be a steady state that I can rely on moving forward. Using this system has gotten me in front of people I never would have met and has also led to additional prospects from my new clients.

**4. In a few sentences, how would you summarize your experience working with us?**

**Brian:** Working with Mike and his team has been extremely easy. If I have any questions or issues, they respond promptly and always take care of me. They have helped me elevate my business to a new level without putting in additional work, helping my practice become more efficient and more profitable.

**Reach out to set up your own client acquisition system**

**Info@LeadGoalsAccelerator.com**