

## **A good way to get more appointments**

My experience with most advisors is that they have too few appointments. They're bored. Their energy level drops off. Their day goes long. And they're just not having the quality of life in their job that they could be having. We want to find out what's the sweet spot for you and then build a marketing engine that's going to make sure that you're getting the right number of appointments for you. And they're going to come from lots of different sources.

A certain number of them, obviously, are going to come from your bankers. Many of them are going to come from your book. And, a lot of them are going to come just from normal routine calls that you are making going out to people, or maybe different things that you are doing in the community. I'm a big fan of direct mail. Direct mail has got a lot of advantages. First, and foremost, it's cheap. In fact, in a lot of bank programs, the way the mail is handled-- it doesn't cost anything to stick a bundle of letters into the mail. They just run them out, run them through the meter, and off they go. So, in some places, it doesn't cost you anything other than the time to write up the letter. The second thing that I like about that is, it's a great way to blast everybody on your list. And the third thing is, if you're using a coupon for your call to action or some other lead generation magnet, in other words, something that they're going to raise their hand and say that, "I'm interested in following up with you," it's a great way to get to those people who are interested in doing something now.

The problem with most advisors, if you've got a book that's got two or three or four or five hundred different accounts in that book, it could take you months to get all the way through and contact those people, and you may not have the opportunity to find out that they're even interested in anything by the time you finally get to them. The need may have passed. But if you've got a steady campaign of marketing materials locked and loaded, and that's what we're going to talk about in the calendar, and ready to go out every single month, several things are going to happen.

Number one, you're going to be talking to your clients a whole lot more, communicating with them a whole lot more. That's going to increase the frequency that they're going to want to do business with you. It's going to make them feel closer to you, make them feel like you're taking better care of them. Number two, you're not going to have to guess when they're ready. They're going to fill out one of those coupons, see something that they're interested in, send it back, and, all of a sudden, you've got these little coupons coming back that are appointment requests. No better way to brighten your day to come back from four or five appointments out of the office, and see a mailbox full of coupons of people who have raised their hand and say, "Hey man, I'm interested in sitting down and talking to you." The other thing is, it creates leverage in your practice. No quicker way to get out to a lot of people in a hurry, and do it very inexpensively, or, depending on your program, sometimes free.