

# LIMITLESS Coaching Call Transcript

AUGUST 22<sup>ND</sup>, 2023  
SUMMER GROWTH RETREAT  
WEBSITE LIVE REVIEWS

0:00:00 Sure, is making these massive bullets you're saying? Right. So so this section right here, implementing something similar to this. I'd love to brainstorm specific bullet points with you, but I need to ask you a couple questions.

0:00:32 Just a good rule of thumb is the The things that tend to convert the best are cheat sheets, checklists, quick start guides.

0:00:42 If you could save somebody time and energy, letting them know what's included in the checklist on the page is really, really helpful for conversion.

0:00:55 Because you got to think people are like, oh, I don't know this thing. What is this going to do for me?

0:00:59 I don't know. Do I even, is it even worth putting my email in? Right. So that's one thing. Another is I'd make it easier to find your lead man on your site.

0:01:16 Well, so then I guess it kind of goes back to, yes, John, before, what are you trying to get people to, I mean, really trying to get people to schedule a call, right?

0:01:27 But if it's, you know, I suppose they may not be ready. And I guess, but I don't really have a spot where they would sign up for the lead man on here.

0:01:37 I think at the bottom, I think they can sign up for the newsletter or something. Yeah, the newsletter sign up call to action is really low converting like doing like a tool kit or a better.

0:01:52 Because it tells me a little bit more about what it is than just a newsletter to stay updated. Okay, so you could if you wanted to do a newsletter, I wouldn't say to newsletter, I'd say sign up for our quick start toolkit and get access to our VIP list where we share information with you that you won't

0:02:08 find anywhere on the site. Just makes it more exciting. So there are three great locations to put your lead magnet.

0:02:17 The first is you could do above the fold in the top menu. Another is insert it in a section on your top level pages.

0:02:28 And then third is on your blog. See where's the blog resources. I think it's insights. We don't have a sidebar.

0:02:41 But also if you had a sidebar putting it in your sidebar or at the bottom of your posts, in addition to inserting calls to action in the content of the blog article to recommend people sign up.

0:02:53 So you said last part again, put it in the content of the article. Including calls to action in your blog article content, encouraging people to sign up.

0:03:05 Was that was that helpful? Yeah, those benefit bullets on the lead magnet are tough and if you want that's something that I'd be glad to brainstorm one on one of the key more if you're interested in that.

0:03:16 I said it for 10 tomorrow morning. Cool. Awesome. All right. Let's do Sarah. Sarah here. Oh, that's not good. Oh, I was looking forward to her too.

0:03:36 She has a real estate real estate wealth planning. That's a good niche. Okay, let's go to the next one. Christian.

0:03:45 Yes, you'll have to settle with me. So I posted on the chat actually just because that website we're doing a whole rebranding.

0:03:55 So we've got a rough skeleton of a draft one going. So I'm wondering if I could just share my screen and go through that because this paid really just has our profiles and not really a whole lot else to it.

0:04:07 Okay, so just so I'm clear you want to you're in the process of redesigning your site and you want me to look at that.

0:04:13 Yeah, just some initial feedback. I mean, it's really rough because this, to be perfectly honest, this tool, their day tool is very painful to use.

0:04:21 And it's not very user friendly, but we need to use it in order to pick up the like SEO domain traffic of the RBD's website with the Estante, all of that traffic, it's supposed to help us rank and insert, so we're sticking with it.

0:04:38 Okay. All right, yeah, we can definitely go through it. But one of the things that I found with specific tools like this is a lot of the recommendations that I have will not a lot, but sometimes the recommendations, the tool doesn't let you do, because you're kind of limited by the tool.

0:04:53 So just take that into consideration. Yeah. Yeah, I'm glad to, if you wanted to share your screen, give you some feedback.

0:05:02 Yeah, it's not letting me share my screen, so is anyone able to, there we go. All right, so the homepage really the main part that's been done is just really this above the fold.



0:05:18 I need to fix the banner image because the text doesn't really read very well, but this is the starting point.

0:05:24 Well, it's already an improvement financial planning for retirees. What's knowledge based business owners mean? So it's really it's businesses where the primary service they offer is some sort of coaching consulting.

0:05:38 It's a process to system. It's intellectual property. That's really no, it's kind of similar to service based business. But a lot of the clients I work with are coaches consultants in that kind of space.

0:05:52 Okay. So this is the. My partner focuses on retirees and I. I have the business owner and you sure that's where there's a bit of a split.

0:06:05 So I did actually guys over the break. I kind of took some of your comments and split this up a little bit more.

0:06:13 Okay, cool. I like it. So see how I had to ask what knowledge based means. Because people are doing that too when they first visit, so that's just something to consider.

0:06:26 You might do like financial planning, and I'm being super nitpicky here, you might just do financial planning for retirees and business owners, and then as you scroll down the page, maybe include like coaches or some of the other ones that you mentioned, just something that they can identify with, or

0:06:41 if like if you launched a coaching practice in the last five years and you want help doing X, Y, Z.

0:06:49 We're here. Anyway, go ahead, scroll down and let's leave. Yeah, so this is all kind of pre-cans stuff from our BD.

0:06:57 So we haven't haven't changed much here. OK. But this is the next step is, again, to get an update and actually write better content for here.

0:07:07 OK. There's not a whole lot really. Again, I haven't just having gotten away yet. The really the big thing, I guess, would be this call action.

0:07:15 This gets started. So with this whole redirect is kind of the to the next step, which again, I can't figure out how to put buttons in this tool.

0:07:23 So I just put a little locks, but what the idea would be the journey is you click that, you know, this redirects you to one of the fields.

0:07:32 You pick one of those and again see it's all the links are kind of broken, but it would then bring you to one of these tabs, depending on which one you fall into.

0:07:42 Okay, so I like this a lot better than the current version of the site because you've gotten more specific. I think one of the challenges is going to be as you really want the right client to visit the site and be like, oh yeah, that's me, where do I go next.

0:07:57 So I'd probably recommend on your homepage including a section that had a headline like who we serve and then on the left business owners and then on the right retirees and then maybe just a little just a short sentence about the main benefits of working with you or a sentence that identifies who those

0:08:20 people are. So like business, we work with business owners who are coaches, consultants, anybody in a knowledge-based business. And then that would go to your, what was the next page you want them to go to?

0:08:31 So then again, it's broken. So I'll share that just the word version of it. So then the business owner one would have these profiles.

0:08:39 So they would have two client profiles that talk about, you know, essentially, kind of before they met us, How we help them and state client test client profiles based on natural clients and then at the bottom you would have what this is where we'd have the bios we'd have your specialist so for mine

0:09:00 it would be have my profile for my partners who'd have retiree profiles and then his information. A little bit. I had it up about 20 minutes ago.

0:09:12 I'm not sure what happened, but when I try to click on it, it just says a 404 error. Yeah, no worries.

0:09:18 It's technology. It changes on its own. Do me a favor and scroll up really quick. Okay. So these are case studies, right?

0:09:29 Yeah. So these would be case studies in two situations. The one on the left is more older set of clients who run their business and are looking to transition and how we help them through the transition both financially as well as, you know, passing the business onto their daughter and all the complexities

0:09:45 that come with that. And then the right is more a younger consultant to whose business is really just starting to grow and grow quickly and kind of how they, how we restructure the business, how we protected the business for their family, if something happened to her, the best of protecting the value

0:10:01 and then get how she were able to get some money out of the business and some tax planning and things we did around that.

0:10:08 Okay. Are you planning to do just these two case studies? You're going to do three or these? I was debating on adding a third just for new so for consultants or coaches who just recently incorporated, but I think right now this is kind of the two main situations we deal with.

0:10:26 And again, like growing business with a young family and transitioning out potentially selling the business and then your future. So that's kind of the two niches, but kind of the two core areas we serve.

0:10:40 Okay, I'm definitely future links. I'm sorry, go ahead. I was just going to say within within the business on our side, that's my partner will have his own kind of that his page will build on his own how he wants.

0:10:52 But this is just for the business side. Okay, so you also have case studies for the retirees. Yeah, that's



something he's going to put together, but we just haven't gotten there yet or he hasn't at least.

0:11:04 Okay. Yeah, I definitely either feature these case studies on your home page or on your retirees or business owners landing pages.

0:11:13 Yeah, that's where these would be. This would be on the business on our landing pages. Also consider adding calls to action to these.

0:11:27 So remember the benefit of case studies is that you want people to read it and see themselves in that story.

0:11:34 And then remember to give them a place to go next. So I definitely had a call to action into these or at the bottom.

0:11:43 So something like, what was their name, the Smiths, if the Smiths story resonates with you, we can help click here to learn more and take the next step or something like that.

0:11:56 Because remember, the purpose of your site is it's a marketing tool to create qualified sales conversations. So every page needs to facilitate or support that purpose.

0:12:07 If it doesn't, then it's not effective. So remember, you want, what's the action that you want people to take as a result of reading these case studies?

0:12:17 It's probably a schedule to call. Yeah, so the next step we have a call page, which again, it's just a really rough breakdown.

0:12:26 Okay, so I got to rebuild it again, but the idea is it'd be, there'd be a button here that says, click here to book a call.

0:12:35 And then I've got to restructure all this kind of move this to the homepage like you were talking about and then we've got a little bit about our process that we go through.

0:12:45 Yeah, the info that we talked about in the websites that works workshop is really going to give you the most leverage.

0:12:54 I think that you're going to have a problem with is structuring and separating the business owners from the retirees. So you're going to want to have a really clear flow about where you direct that traffic.

0:13:06 But separating the landing pages is going to be key. So I think that you're on the right track. So I feel good about that.

0:13:13 Would you recommend just putting separate contact us pages that have kind of this, these kind of we work with? Or would you recommend kind of separating everything?

0:13:23 Because the one I guess is a question I have, especially with this page. I can imagine this page is going to get pretty long.

0:13:30 So I don't know if I want to put too much content on one page with a lot of it just getting varied at the bottom.

0:13:40 Like if I have this and then I have the you know call contact us and those call actions at the bottom is that going to be too much information on one page where everything at the bottom will just kind of get lost.

0:13:53 I don't know if on the website I put your information on the case studies page. Okay, so get rid of this.

0:14:04 I, well, this is just, this is just a theory, right? But remember, remember the intent behind people wanting to visit and read these case studies is they want to know how you can help them.

0:14:20 So it's likely that they'll have visited the about page already, which is where this information is. And anything that takes away or distracts from the next action you want them to take, which is scheduling a call, could be detrimental to the effectiveness of the site.

0:14:34 Just something to consider. I don't want to tell you what to do, but just something to consider. Was that helpful?

0:14:43 Yeah, that was really helpful. The only other tweak I'm trying to make is move this call action here. Contact us if I move this over.

0:14:53 This last button here is automatically highlighted blue. So I want to make this our call to action, not the link to the client portal.

0:15:01 Yeah. Figure out how to do that. Yeah. So log into your account. That's an important thing that people visit your site for a lot.

0:15:11 We've experimented with removing it from the top menu to be in the footer, because it can really distract from the calls to action for the conversion.

0:15:24 Goals of the site. So instead of it being a button, could you just have it be underlined or something like that?

0:15:30 Yeah, we're also just the main, there's another way to get to this website so most clients just go to our BDs website and there's a client login link at the top there.

0:15:41 So we don't have a lot of clients that actually go to our website to get onto their account. So that's why that would tell me that that's valuable real estate that you probably want to include a log into your account button at the top or just something to think about.

0:15:59 Yeah, because remember it's a it's a marketing asset. You want it to be optimized for conversion. And if once people become clients, you're telling me that they don't really visit your site to log in, then you want to make sure that the calls to action at the top are to schedule a call, not just 50.

0:16:17 Okay, thank you. Log into your account. Yeah, all right. Perfect. Makes sense. Yeah, that's been really



helpful. Awesome. Okay, so I'm told we have 50 minutes and I want to move right along.

0:16:31 We're doing good, though. We're doing good. Okay, Christine. Christine here. I'm here. Awesome. Okay, so you're on Squarespace. Yeah. Oh yeah, thank you.

0:16:49 You are on Squarespace. You rated your site a seven out of here? Oh, I was looking at this before. Okay, so I'm looking forward to looking at this.

0:17:10 So you rated to seven out of 10. Why is that? Well, like, because it's less than two years old. Yeah, I don't know.

0:17:21 I mean, I think it's probably a huge improvement over what I had before. So, but other than that, I don't know, I'm just kind of realizing now and I want to hear a last session that there's a lot more that can be done here.

0:17:40 So, on a scale of one to 10, you're rated it as a seven. What do you feel it would need to do in order to make it a 10?

0:17:51 Yeah, so I think probably just convert better and like clearing be really clear and concise and also So we don't have anything on like the case study side.

0:18:04 So and also that. And then also we just added a lead magnet. So I'm really looking for kind of some help there, because I know we're not like leveraging it in the right way.

0:18:16 Yeah. So just being kind of really clear and concise with who we serve optimizing the lead magnet and trying to somehow integrate case studies are really like the big big things I think for me.

0:18:27 Okay, cool. Yeah, that makes sense. So I have a couple of thoughts, but I like to ask a couple questions first.

0:18:37 The reason I always start with the above the folds because remember has the highest leverage. So help me understand a little bit more about who your ideal client is.

0:18:47 So financial planning for equity compensation. What does what does that mean? Yeah, I'm so much of our clients are in tech and have like RSUs, ISOs, some type of equity comp.

0:19:04 Okay, so there are because of the industry are there things that are available to them that might not be available to other industries as far as like investments or retirement planning or savings or something like that.

0:19:25 I don't know if I understand like, what do you mean like a type of like well sometimes. So sometimes different industries are niches have because of the nature of the niche.

0:19:38 It makes things easier. So for example, like health care or government or. Or what was the, sorry, I had a brain fart really.

0:19:53 What I'm asking is I'm trying to understand if why you're focusing on equity compensation instead of identifying and calling out your ideal client above the fold.

0:20:05 Oh, got it instead of saying like big tech or something like that. Is that what you're getting at? Something like that, yeah.

0:20:12 Okay, because, I mean, and the majority of our clients are in big tech, but we do have some other clients that don't fall into tech, but have equity count.

0:20:25 Okay, so it's a targeting thing. You're worried that if you directly speak to the best, I've been people, yeah, that's a fair.

0:20:35 So this is the thing about niching is that you kinda have to go all in and having a traffic source is really important.

0:20:44 So how are you currently marketing to this niche? Yeah, so a lot of our, so we have a blog, and I think more traffic comes from blog and LinkedIn.

0:20:58 LinkedIn is probably, LinkedIn is a good source for us because they tend to get a lot of referrals like our current clients are further co-workers.

0:21:09 So yeah, and then previously in the past, I'm looking to resume. We also did webinars as well. Okay, were those effective for you?

0:21:21 They were really effective. Okay. Why do you stop doing them? I'm just curious. Budgeting not on our side, like budgeting at the.

0:21:32 Some of the big tech, like what they used to allow. Basically, they're not allowing their employees. We went through weed.

0:21:40 And I realized we can kind of do it on our own, but like we went through HR and so budgets have been cut unfortunately.

0:21:50 Okay. All right. That makes sense. So these, I would call these your, your benefit bullets, right? Okay. I'm just going through seeing.

0:22:08 And you could also put, so this is social proof, these logos, consider putting those above the fold. Okay. Engines, schedule a call, create your plan, achieve your goals.

0:22:23 I'm just going to read through this a little bit. Yeah, so just here's a quick example. So if I'm never mind assessing else, you work in tech making smart money choices can feel overwhelming.

0:22:46 Did you say you had a lead magnet? It? Yeah, it's at the bottom of the page. Okay, do you have a landing page for this or is it just?

0:22:54 No, I just wrote that down when you mentioned that to one of the previous people. Okay, so I think that if I were to give you a couple things that would give you the most return, it would really be getting more specific in the



above the fold so that when your ideal client visits to site, they know that

0:23:16 they're in the right place. Now, if you're worried about the downsides of niching, you could add a section to your home page that said, not in big tech, we can still help you.

0:23:28 We help retirees, click here to schedule a call or learn more about how we can serve you something like that.

0:23:37 So, for your lead magnets, it's, what, see, are you doing Facebook ads or anything like that? No. No, I'm not just haven't honestly like really was doing zero marketing prior to this year.

0:24:01 So haven't done anything like that yet. Okay. Do you have any, where are you leaning towards? Like, if you were to start marketing, what channel do you think you would focus on?

0:24:16 I know you said you had some effect. Try to a couple things that were pretty effective, are you planning on doing that again?

0:24:22 The reason I'm asking you is because this kind of helps frame the best recommendations I could give you. Yeah. So for me, it's definitely like webinars will be what I'm trying to focus on.

0:24:32 Okay. Okay, so the next step after the webinar would be scheduling a call. Mm-hmm. Yeah. Okay, let's look at this really quick.

0:24:41 Working with you. Yeah. So for here, the, did you watch the websites that work? I did. Yes. Okay. I think getting specific about your process.

0:24:58 Okay. Would be helpful, especially there if you start doing webinars. Because one of the things about your brand is simplicity, right?

0:25:05 So when I come to the site, I want things to be simple and clear and specific. So I think that part of that is going to be making sure that you update some of the copy on the site to speak directly to who you work with.

0:25:18 And then very specific about your process and scheduling a call. And then in the future, having a lead magnet. And getting really specific about the benefits of downloading the lead magnet and then set up a dedicated landing page that you can send people to.

0:25:34 I think that one difference on on your conversions. But the above the fold is going to have the most impacts.

0:25:41 Okay. I'd love to brainstorm some possible solutions with you. I don't know if you have one on one time with me or not.

0:25:50 Typically writing above the fold home page copy is the last thing we do because it kind of you kind of do a lot of, you need to do a lot of other things to figure out what that needs to be in the first place.

0:26:01 So it's not to brainstorm headlines with you live now, but I'd love to ask a couple more questions. And I'm sure that I could be more helpful with that, but I think that's going to be the biggest point of leverage for you.

0:26:10 Okay. Awesome. Okay. Cool. Was that helpful? Thank you. Yes. Having the question. No, not right now. I'm just taking taking furious notes.

0:26:22 That's good. All right. Cool. Okay. Rosario. Rosario. I'm sure I'm butchering that Rosario. Thank you. Thank you. Rosario. Are you here?

0:26:38 Okay. Awesome. I should have put that together. Okay, let's pull up your site. You're on Squarespace. I try it. Yes.

0:27:04 Okay, so you're on Squarespace. Your niche is life planning. That's awesome. You rated your site a five out of 10.

0:27:15 Help me understand a little bit more about why you chose five out of 10. We'll make it a. Cause I need to narrow down the niche.

0:27:23 And I have a situation where I'm not sure, because I do work with, I have some female doctors and I have people in tech and other people, families, young families.

0:27:37 So I started with Gen X Y families and that's why I wanted to do the life planning because I want them to start and get into that wealth generation.

0:27:49 And yeah, so that's why I cannot give a high number because I still have to work a lot on this.

0:27:56 But I want to know what's next. Why should I should be working first? Yeah, yeah, no, that's that's great. Okay, so one thing that stands out to me right away, and this is a surface level kind of feedback, but this is kind of hard to see, this getting appointments kind of hard to read.

0:28:19 So that's one thing that I would I would work on. So if you just had it solid like that, say that's much easier to read when you hover.

0:28:28 I'd probably reverse it or just make it so it's solid color without having to hover over it. That would help.

0:28:37 Create, cultivate a healthier relationship with your finances. So I'm going to start asking you some questions that are designed to help me understand a little bit more about the benefit of how you tie life planning together with finances.

0:28:52 Is, how many understand a little bit more about that? I also have training and coaching. So it's more about what impact do you want to create with your money?

0:29:05 And why do you have some barriers or biases about your money, how you grow up thinking of? And that's why one of the big pieces is started talking about like, how do you grow up?

0:29:18 Where are the scripts? And is that helping you? Or have you thought about changing? And how can we



change this and work through that?

0:29:28 Cool, cool. Cultivate a healthier relationship with your finances. So you're gonna hear me repeating a lot of myself here, but that's good because it's important.

0:29:42 But when your ideal work perspective client visits this homepage, your homepage above the fold, what impression do you want to leave them?

0:29:57 What, let's scroll down a little bit. Okay, so one of the things that I would consider doing is adding a section to your site that had who we serve because you have different archetypes and different types of clients.

0:30:28 So I would create a box for each one of those clients profiles and then I would link that to a landing page that kind of explained who those people are.

0:30:41 Some of the questions that they have are the problems that they're struggling with and then adding a call to action to to schedule a call.

0:30:49 All of those could go to the same schedule a call place, but you want it so that when people visit the site, they can identify with.

0:30:57 With one of those things because they just want to know that they're in the right place to where to go next.

0:31:03 I like your story here. I think that's really good. How about a lead magnet? Do you have like a PDF download or anything like that?

0:31:14 I've been working on it forever. I know. Oh, I know. Lead magnets are, lead magnets are good ones are tough.

0:31:22 Okay. So you're free. Grab my free guide. What is it? Exactly. Do you want to brainstorm really quick? Okay. So I'm assuming that I could download it from here, right?

0:31:41 Right. Okay, so do you want me to download it? Or do you? No, it's not there. Oh, it's not there.

0:31:48 Yeah. Okay, so I couldn't sign up for it right here. Right. Okay. What have you put in your your league magnets so far?

0:31:57 What are your ideas? It is about, and I speak about a lot of behavioral finance and the general wealth and how making changes starting with the cash flow, and how powerful it is to start investing in taxes, right?

0:32:17 So with 401k, Roth IRA, and also the decisions that we make with our families is a family endeavor. So that's the kind of thing.

0:32:27 It's very family oriented. Okay. Remember, the best converting lead magnets are the ones that help people save time, save energy, and can condense a lot of information into one quick and succinct guide.

0:32:47 So what are some of the things that you feel like your prospective clients or ideal fit clients are thinking about or looking for or questions that they have when they're considering their services?

0:33:00 Well, the main clientele I have is they have student loans. A lot of them. And I has become one big piece in my life.

0:33:14 It's not like I was looking for that, but the people that have been looking for help are physicians and people in tech or families that both spouses have student loans.

0:33:26 So I think that that one in my situation that has been the biggest piece and how do they manage that with taxes?

0:33:37 Okay, that's really good. So another great way to think about the best lead magnets is what is the big problem that needs to be solved right now or that they can take a simple action to start solving, which would be signing up for you.

0:33:51 So if paying down student debt is a big pain that you find a lot of your clients are in, maybe doing a lead magnet about five things that you can do to start paying down your student debt that you could start today or something like that might be a good lead magnet.

0:34:12 Something like that. Because you got to think, like, you know, Dave Ramsey, I know we all see you. But one of the reasons why his marketing is so effective is because he's got those baby steps, right?

0:34:21 So what that does is it takes all the stuff that you could be doing and puts it into six simple steps.

0:34:27 So if you could, I'd probably brainstorm like what your steps could be based on what you've done with your clients and your unique perspective on things, adding some of those in there, and then always including a call to action in the content to save.

0:34:42 This is something you'd like help with. I recommend signing up for a free call with me, and I can take you through it, something like that.

0:34:48 I think that would be, I can think of one of my clients, I'm going to go to the open house.

0:34:55 They came because they had so much student loans. They wanted, We clicked, because I have non-profit background and the wife works in non-profit and the husband is a physician.

0:35:11 And they came and said we have so much loans and we don't know what to do with our lives and we don't know if we should start a family.

0:35:19 So they just got a house, it was just a month ago. So that is what opens up. When you speak with somebody, I'm not saying that that was because of me, but just speaking about that and having a strategy, open up for them to have a house.

0:35:32 Yes. And now they're planning on the family because we were able to see the monies available for that.



Right. Yeah throughout a position where there's a lot of options, they feel overwhelmed, they're not sure what to do.

0:35:47 And then just having somebody that they can talk to who can sit them down and help them figure it out.

0:35:51 Just not only what they want, but where they're at and how to start taking action on those things or something that is really valuable to a lot of people.

0:35:59 So I would, I'd probably start there. And then I'd think about your, your above the fold, it's really hard for me to brainstorm good headlines like in an environment like this.

0:36:12 I need to ask you more questions and more about your clients. So if you wanted to have a one-on-one with me, perhaps sometime this week, I'd be glad to to brainstorm more with you.

0:36:22 Thank you. Yeah, absolutely. Okay. Michelle. Hi, Michelle. Michelle. Hi. How are you? Good. I am excited. I'm excited too. Yeah.

0:36:35 I'm ready to learn. Okay. So we were talking a little bit earlier. And you were telling me that you were not techy at all.

0:36:48 All right. So let's go, let's go through this. Help me understand a little bit more about your nation who you're speaking to right here.

0:36:57 So Lubrizol is a company that's headquartered in Cleveland. They're found throughout the country. They have different offices throughout the country, but they're headquartered in Cleveland.

0:37:07 It's a chemical company. Okay. And you specialize in serving employees who work there. Retire from that company. Yeah. Oh, that's a very specific niche.

0:37:16 Yes. Okay. So how's your website been doing? It's not. It's not. How are you getting in front of your niche right now?

0:37:27 The only thing that I've been doing for marketing is LinkedIn. Okay. So I write on LinkedIn. Oh, and I've done two webinars.

0:37:35 I plan to do more ideally. I'm going to do them monthly. But all I've done thus far is LinkedIn and webinars.

0:37:43 Okay. How have those been going for you? I think they've been going well. But. I've had a couple people on LinkedIn reach out to me from my niche and schedule appointments.

0:37:58 I had two or three two webinars. I had five people or four people even between the two webinars. One of which has booked an appointment.

0:38:10 We held it and he's booked another appointment. Okay. But that's been it for what eight months now. Okay. So it sounds like it's kind of like a new thing for you.

0:38:24 Yes, since our last a limitless retreat. That's when I decided on the Lubrizol employees. I went all in on that.

0:38:32 The LinkedIn, I just started in January, maybe even late first quarter of this year. So it's all very new. Okay, so I have two thoughts.

0:38:45 The first is you have a unique opportunity in that But do you live close to this, yeah, so you could really leverage local SEO to get more visibility on your stuff?

0:39:04 I think that local SEO is something that's often overlooked for people who are like, I need to be online and get everybody, right?

0:39:15 The problem with that is your sphere competition is just huge, but the benefits of things like niching and local SEO is your spirit competition shrinks from being like national to local and specific to your niche.

0:39:31 That's why I recommend local SEO. I think that'd be a good thing for you to look into. What is local SEO?

0:39:38 It makes it so that when people are looking for an advisor near them, that you show up. So it's optimizing your site for local SEO.

0:39:50 I don't think that I'm going to get somebody just. Because loopers all employees are very close to you, right? So they're going to pick up the loopers all employee that's making that work.

0:40:07 So you could target your marketing to loopers all employee, which is what we're talking about. But remember, so just like you diversify your investments, you can diversify your marketing strategies.

0:40:19 And local SEO is just one. So it increases the likelihood that somebody who was an ideal fit client would find you if they started searching for you.

0:40:26 Whereas that might be a little bit difficult now because you don't have any local SEO going for you. So it would be anybody to keep it possible.

0:40:37 Right, it would, but because of the location that you're in, it's highly likely that that would also be a Lubrizol employee because you're close to them locally.

0:40:49 That's the place that I would start. Also doing like local workshops for Lubrizol employees and then referring them to sign up for your cheat sheet or lead your schedule of calls where I would start.

0:41:04 So here, this is your, this is your lead magnet download page, right? And I think you told me that you hadn't really gotten much, many leads from that.

0:41:13 No, I've gotten one. Okay. So as you push this a little bit more because I think that's, let's do, I'm just going to give an example here.

0:41:25 Like the paper doesn't save time or save energy at those edges. Okay. There's nothing wrong with that. So what are the benefits though of a liaison employee reading or downloading the lead magnet?

0:41:40 What do they where they get from that? Well, they don't know this right because it's not listed there, but I



know that I talk about their 401k match contributions to their HSA.

0:41:54 A couple of other things that are specific to their benefits, but it's not listed there. So like in that sheet, you show like if you're Exxon or if you were a Chevron, and then you looked in what do you call a benefit bullet?

0:42:09 Benefit bullets, yeah. I would go through and think about one of the benefits to a loser's own employee for downloading your lead magnet, like three to five, because the benefits are, it's specific, there are unique benefits for being employed there and you're going to show them how to make the most

0:42:29 of those. Or in some cases, make them aware of it in the first place so that they can take advantage of all the things that they need, even though they had, access to.

0:42:39 And that's a very compelling thing for them. Okay. Does that make sense? Yeah, I kind of, my hope, my hope was that they would see that nine things every employee needs to know and they think, God, I need that, but apparently only one person's needed it.

0:42:59 Well, there are a lot of people who need it, they just go ahead, right? So that's part of your job would be to make sure that they know the things that the benefits to downloading are.

0:43:13 Okay. I think you've got a great base there to build on. You've got a specific niche and a good location so getting your conversion components in place is this is a great place to start.

0:43:33 Was that helpful? Yeah. Can you go back to the top? I don't know. Home page? Yes, thank you. And if you scroll down a little bit, do you like this?

0:43:51 Do you look at this and think, yes, I have respect them? Yeah. What are the questions that you typically get from your prospective clients when they come to you?

0:44:05 Am I okay and I retire? Do we have enough? And then I don't know how to take advantage of it.

0:44:21 So I need to add that one. Okay. That's great. Is there, I would be exploring ways that you could get more specific with the language to target your niche.

0:44:34 So like adding things like, when can I retire from Lou Brazil? Am I pronouncing that right? Yeah. Okay. What are the options that are available to me that I'm missing out on?

0:44:50 The more specific that you can get with language the less generic it is and the more people when they visit it they're like oh yeah this is Spain this is exactly what I'm looking for.

0:44:58 Okay so that's what I would probably start with. These are a great place to start with but think about how you could I would be looking for ways to relate these questions and reframe them and rewrite them in a way that directly speaks to somebody who would be your ideal client in your niche.

0:45:16 Okay so then my ideal client talking about the services should that be more tailored to my client to the loop is all employees.

0:45:33 I didn't use any specific language. It's very generic, I don't think I guess. Yeah, so I would you have a really great base, but it needs to be filtered through the lens of your niche.

0:45:55 So I would go if I were to be doing this, I would be going through the I beat first of all I talked to your clients and then I would look for ways to include specific language inserting it into what you got here so that it's specific to so that if a loopers all employee visited your site or looked at

0:46:13 in your marketing material, they would be like oh yeah, this is this is exactly what I'm looking for. Okay. Is the first page, what do you call it, the above the line or whatever?

0:46:24 Above the fold? Yes, above the fold. I mean, if you were a Lubrizal employee, do you look at that and think, yeah, I want some of that?

0:46:34 I think it's definitely in the right direction, because it's specific about it's the results there and who you serve is there.

0:46:41 Okay. Like I said, above the fold lines are the hardest to get right. Okay, I'd be down to brainstorm some, I have a one on one with you.

0:46:50 Okay, great. Super excited. Okay. Thanks. Yeah. My pleasure. Yes. Okay. Cool. Who was, who was next, Sarah's next stream? Was hoping Laura was next.

0:47:12 Yeah. Sorry. Okay. Cool. Oh. This was another interesting one that I that I visited. Okay. All right. So, hi, Laura.

0:47:28 Nice to talk to you. Nice to talk to you, Greg. Awesome. So, first of all, you rated your site six out of 10.

0:47:39 Can you tell me a little bit more about that? I'm still trying to work. I've changed the above the fold language so many times.

0:47:47 I'm still trying to identify who I am really called to serve like whom I niche is. And more specifically, I guess, I had quite a long career on Wall Street and left it with the intention to make a lot less money because I realized that I was basically spending my time to make money.

0:48:10 And I'd rather use my money to, you know, enhance my time. And so looking to work with other people like that, and it was spiritual practices, mindfulness, illness, et cetera, that helped me get the balls to make my life change, that life change.

0:48:26 But now if I look at who I work with, it's not that many people like that. That is. Any thoughts?

0:48:36 I said, why do you think that is, any thoughts? Well, I think I, you know, just, I work with people I like and that come to me for help.



0:48:46 I guess it's not quite fair. I mean, more and more recently, I have people who, you know, who've left positions or thinking about leaving positions to do something that resonates with them more, but that's not solely who I'm happy to work with.

0:49:07 Okay. So how has your site, let's see, how do I want to ask this? What has your site been doing for you up to this point?

0:49:20 Do you feel like it's effective in helping you get the clients that you want or something's missing? Like, help me understand a little bit more about where it is and where you want to take it so that I can be more specific about some the feedback.

0:49:36 Any thoughts there? I guess if I think about it, it's serving more as a business card that when people learn about me and how did they learn?

0:49:44 I have a podcast though, I'm not really, that's only since January and I'm not really sure that it's a pipeline.

0:49:52 I post on LinkedIn, I have an email newsletter, I do a lot of networking. So I think once people hear of me, then they will go on the website and it either does or doesn't resonate with them and I'm more than happy if it doesn't resonate with them that if they don't continue.

0:50:11 So it's not really converting basically. Right it's not yeah. Okay, so you got a podcast that's great. Are you currently referring or sending people to the podcast from the episodes?

0:50:25 Do you invite people to visit your podcast or visit that you're scheduled a call page or download a lead magnet?

0:50:34 Only in the show notes, so not in the actual wording of the podcast. Okay, okay, great. So I'm, all right, sent you, all right, let me do one more thing.

0:50:50 Where is your lead magnet? So your email sign up called to actions. Is it just the newsletter? Do you have like a PDF or?

0:50:58 I do have a PDF. It's a good question, Greg. I think it might be in who I work with. I know it's at the bottom of one of these stages.

0:51:06 It's basically a lead magnet that snappy Kraken had. I don't know if it's at the bottom of here. I have some case studies.

0:51:16 Subscribe to learn right. Yeah. Download to break through your barriers to financial empowerment? Is that the lead magnet? Yes. Okay, so if it's this hard for us to find, imagine how hard it is for somebody to find who's never visited your site before.

0:51:40 So that's probably where I would put energy or effort into, if the goal is to increase conversions, it would be around your lead magnet, making it easier to find on your site, More compelling adding to the landing page and adding calls to action into your podcast the directs traffic to sign up for the

0:51:59 lead magnet. Is that sitting okay with you? Yeah, so I do have a landing page for that lead magnet and also for scheduling a call.

0:52:10 I did notice as I'm going through this that I that it is geared towards women and I've actually started to take the language, you know, I had a lovely couple reach out to me say what wasn't sure if you're speaking to couples because They saw a lot about women, so I've changed some of the language, but

0:52:26 this is geared towards women. And I think it was on the first page, and I was told to just really have scheduled a call more prominent on the first page.

0:52:39 So, you know, it's hard to, Yeah, so we're some testing. The reason why I'm talking most about the lead magnet is because if people aren't ready to schedule a call yet, that's going to be an effective tool for you.

0:52:56 And it's a little harder to find. So I would test adding a call to action to your homepage that was to sign up for your lead magnet.

0:53:06 I'd also consider adding a call to action and to your top menu to sign up for it. And then on your blog articles, if you have a sidebar, including a call to action and a sidebar, do you have an idea about what you would say in your podcast to send people to your workbook landing page?

0:53:30 No, I could think about it though. Yeah. Okay. So something around like unlock your money blocks around mindset and things like that.

0:53:42 Okay. Is that I'm asking is that? I don't know. It's actually since my my podcast is really about transitions. It's interviewing women who've been through a big life transition.

0:53:54 So maybe I should think about having a lead magnet about, you know, thinking about making a change or change or something.

0:54:06 Yeah, so aligning the messaging and the conversion asset to the content and topics of the podcast is always really important, especially for conversion because remember context makes a big difference.

0:54:20 So are there like four, five, maybe common transition points that you find your clients are typically and when they come to you?

0:54:28 I mean the largest ones and so that's it's just one people are thinking of transitioning towards retirement or people are thinking of leaving their current jobs and how much money do I need to earn from another one can I stop working now those are common.

0:54:48 Okay. You're fine people who are like maybe in the middle of a divorce or recently widowed or anything



like that.

0:54:56 I have not had those now I've had people after divorce, women who come several years after going through a divorce.

0:55:05 Is there anything that you typically talk about related to those transitions when you're having conversation with conversations with clients or when you're doing podcasts interviews?

0:55:19 That question makes sense. I'm not a hundred percent, but I do an echoing, I believe for name Rosaria, I start my podcast off always with what was money like in your family growing up and I talk a lot about money stories with my clients as well as values.

0:55:42 Yeah, so what I'm fishing for is I'm looking for something to explain. To help explain and look for opportunities to refer people to sign up for a lead magnet based on content or topics that you have frequently with clients or that come up in your.

0:56:00 Okay, thank you in your podcast episodes because as you grow your podcast that's going to be effective lead generation tool for you.

0:56:09 So that's why I felt like talking about your conversion assets was a good use of the time. Okay, I'll think about that.

0:56:21 Remember in the for call to action and podcast to be effective, it's important to relate the information that you're talking about to the lead magnet.

0:56:31 So like if you're saying something like, well, we're talking about transitions, if you're in a transition right now, are five steps to whatever ebook is a great next step for you in it you'll learn how to x, y and z go to my website.com forward slash workbook to download it.

0:56:54 That's a great idea. Okay. Yeah and you want to do some experimentation but the point is like your podcast you could put a lot of work of working with that And it can be an effectively generation tool for you.

0:57:09 And starting to develop the habits and having just the calls to action in place first will help you avoid a lot of pain in the future because you feel like I'm putting so much in my podcast and it's not doing anything for me.

0:57:21 That's not a good feeling. But if you have something in place early, it can really be valuable asset to you.

0:57:31 OK, great. So I hope that helps. That is helpful. I've been just agonizing over the above the fold, but maybe I should agonize less about that.

0:57:43 It just feels a little bit too bland, like it could be Marilyn's saying the same thing, though I'm told the picture is warm, so.

0:57:52 I love the picture. I do think that you had a pop-up, it's not showing now, but I think you used app sumo to do a pop.

0:58:01 I recommend actually taking that down because when it popped up, I didn't know how to exit out of it. Okay.

0:58:08 So I'd consider, I'd consider removing that. Okay. Anyway, I hope that was helpful. Thank you. Yes sir. How do you balance schedule look all with?

0:58:32 Yeah, that's a great question. Yeah, he was, his question was related to how do you balance? If you're wanting to feature schedule a call and sign up for lead magnet.

0:58:46 How do you balance between those calls to action? Yeah. So there's no wish I could give you something like fancy marketing formula that is, you know, I typically recommend only having one call to action above the fold.

0:59:09 So either schedule a call or sign up for an email list, putting your schedule a call or sign up for your email list in your top menu is a good thing to do in addition to so what I would do is I'd pick one for the above the fold and then I'd test a different one in the top menu so let's say you're doing

0:59:34 schedule a call I would put whatever your your lead nine it is what is what's your lead magnet you have one okay Okay, so if it was a cheat sheet or a checklist or something like that you could put a call to action for free that says free checklist or free cheat sheet up in the top menu, that would

0:59:59 be that would go to your your email list. Also, on your homepage, your top-level pages, I would balance different calls to action between scheduling a call, and then signing up for your lead magnet.

1:00:19 So, typically, what we'll do is say something like, all right, if you're not ready to schedule a call yet, download our workbook on dot, dot, dot, dot.

1:00:30 So, that's typically what we would do. Absolutely. Okay, all right. So Chris is next, building towards wealth. Yep. Hey, man.

1:00:52 How you doing? Good. All right, let's pull this up. Okay, cool. So you're you rated six out of 10. Well, it's 6 out of 12 from the earlier website self-evaluation.

1:01:10 Oh, okay. Very good. All right. Yeah. Thanks. Okay, so help me understand a little bit more about kind of what you're, yeah, so I'm helping Gen X and Gen Y business owners make smart, make smarter financial decisions, right?

1:01:23 Would they all want to make sure that they they are able to to spend more time to have more time to themselves spend less than taxes have less stress?

1:01:30 We're going to help them with all three. Okay, cool. How do you feel? How are you feeling about your current site?



1:01:37 What's working? What's not working? So when I put the site together probably about three years ago, it was just that you know to have a site, right?

1:01:45 Like so I started a newsletter that went well. I had the website and then you know as we've done this You know, like it wasn't really good for me, but it's really sort of a you know proof that you know I'm who I say I am.

1:01:55 I have a real website So we do we run a blog through this. You know, we do the newsletter we do a lot of posting on LinkedIn and so a lot of like our content is held on the website that we're putting on to LinkedIn.

1:02:10 Now we're also just posting it natively to LinkedIn to boost the algorithm. We do have a couple of lead magnets that we've used on here but we like we really, it's not really necessarily like generating a lot of leads even when we run the lead magnets.

1:02:24 We did Facebook ads a year and a half ago, blew a couple thousand dollars and got a bunch of other advisors that ended up asking for lead magnets.

1:02:33 And in people that weren't really like the perfect fit and like the cost per lead was, yeah, pay traffic's tough.

1:02:40 It was like two and a half times what I was told to expect. I'm getting it. So that didn't work.

1:02:47 You know, so most of what we're doing is like is really COI generated, right? But like it's face to face stuff, which is really what LinkedIn is driving for us, but I need to develop a better strategy to also just actually drive clients, it's not just the clients, the prospects I'm getting from the

1:03:02 COS, but actually driving actual clients to the website and wanting to schedule call. So what is on your current site?

1:03:13 I think we were talking a little bit before. You feel like it's some parts of it just are out of date.

1:03:19 Yeah, I mean, so we put together three years ago and then we've added and rearranged a couple things and probably not like to, like I probably need to sit down and what makes sure all the pieces are all pointing in the same direction.

1:03:32 So sort of like we help with clients, you know, they have a 401k and now I did my insurance and now I did my estate plan, but are they all pointing at the same direction?

1:03:38 Yeah. So what are the things that you feel like are out of date? The upside down about page was, was where, you know, so the, you know, so like that you Yeah, yeah, so that was that's not what you know what What necessarily like I didn't think that that was necessarily good and then the the schedule

1:04:00 will call But like doing the schedule the call page right okay, so do you feel like these currently reflect? Some of them do there's like a couple probably that that we could that we could edit out to it right But I don't think like we'd really like the the call pushing people to the the call to action

1:04:17 , right? Say free guy so that site's not converting. What's the free guide? What's it all about? So we have like so there's a business owner financial planning guide there is we out like so that's the business owners financial planning guide that we have on there.

1:04:41 We also have one that's like the seven to seven steps for long-term wealth for business owners and five problems every business owner has, which is I believe Magnus that we've tried.

1:04:51 Okay. So if I'm a business owner visiting site, I'm looking for reasons to sign up for one of these things.

1:05:10 A business owner's planning guide. That's serum going with it. It's not very specific. Like what are the benefits of signing up for this thing?

1:05:21 Do you have the I don't know what they are right now. I love the pictures, by the way. I wouldn't change the pictures of you and your kid are great.

1:05:35 What's this view all? So that's where it could normally what I think. So that's going to take you to the blog.

1:05:43 Actually, that's going to take to the blog carousel, which is OK. And this is your archive for all your posts.

1:05:53 I definitely think about what I think about the benefits of the business owner signing up for your guides. Like, what does it do for them?

1:06:01 Like, what are they going to learn about? How's it going to help them? Right. So that's the first place that I would start is be more specific and in the call to action on your homepage and in the call to action to sign up for the planning guide on your site.

1:06:16 It needs to be a little juicier, right? I just need to know as a business owner, why would I want to sign up for this thing?

1:06:22 What am I going to get? That's the first thing thing I do. And then I'd feature it in your homepage, excuse me, your top menu, in your sidebar, and then make sure that you had calls to action on all your top level pages for that guide.

1:06:39 That's the first thing that I would do. Are you adding calls to action into your content to download the guide?

1:06:45 We are actually, we're trying to make it bolder in those to make it a little bit more more obvious. So that's actually something that we just started doing in the last week or two.

1:06:55 And then in our newsletter, it's now very obvious the call to action at the end of the newsletter. Okay, okay, good.

1:07:03 Let's see. Custom Facebook feed, yeah. I guess at the end. Probably fix that. See, one of the things about part of people visiting your website is they want to find a reason to justify not working with you.



1:07:27 So they're looking for excuses to validate their fears that this guy is not, he's, I shouldn't call him. And there's nothing wrong with that.

1:07:35 Like we're all overloaded every day, we need kind of like shortcuts in place to help us make decisions. So stuff like this gives them a reason to think that this guy doesn't keep his side up to date.

1:07:48 Right? Okay. Just, you know, that's just the way it is, right? Like I do the same thing. I'm sure you probably do.

1:07:55 You're like, thanks, man. That's not very helpful. It's just some of the psychology you psychological reasons.

Do you have what's your what's your schedule of call pays?

1:08:07 Is it just a book, a book of call? Yeah, so we have we have it broken out too for like one that's like people that already know they want to work with those and then people like that had questions, right, that like they're like, is this right for us?

1:08:19 Yeah, let me read this for a second. I consider putting, how do I know if I, if I'm a good fit, I consider putting that above the steps because I think it's like a relevance of reading the information.

1:08:42 It's not worth reading the steps if they're not a good fit in the first place. I like having the benefits of working with you below the steps.

1:08:52 That makes sense, kind of like an FAQs almost. And then choose option below the schedule, call that's fine. Yeah, I just put the, how do I know if I'm a good fit?

1:09:02 I'd put that at the top. But also consider, instead of interested in a conversation, so you have interested in conversation, interested in working together, those are kind of the same things.

1:09:11 So I might consider condensing that into a title or a name for your process and just saying, like it's a 45 minute conversation to figure out if we're a good fit together or whatever it is, just be really specific about that intention.

1:09:28 Let's see, is there anything specific that you want me to look at? Yeah, I think the biggest thing is that, so part of the frustration I have for with marketing is that a lot of people look at stuff and they're like, oh yeah, you're doing pretty good stuff.

1:09:46 And I'm like, it's not working. It's not working. It's good. I mean, and understanding, it's a long thing, but I've had, most people look at the LinkedIn content, and we've been doing it for 20 months, and we've gotten two prospects out of that.

1:10:00 It was better than nothing. Thing, right? But what we've gotten feedback, I do get feedback from other business owners or COIs that I network with.

1:10:11 And so that's part of the reason. We've changed the tone a little bit of that and what we're focused on and trying to provide content that our COIs can actually give forth and just try to their clients.

1:10:23 And our YouTube channel that we do, which is part of the blogs, we started just answering questions now. So we went and asked our CPA, the CPAs that we know, like, what are the questions that you get that I can answer for you that you could just send out a video for it essentially, right?

1:10:37 And so that's what has been the topics for it. And that's obviously a recent change. I know that that wouldn't necessarily have a big effect.

1:10:44 Yeah, but we've had the newsletter going on and I had the weird thing with newsletter where I got three of my top five clients in the first two months I wrote the newsletter, just like I had all these email addresses.

1:10:55 They all converted really quickly. And then we've got one more client in two and a half years on the newsletter, right?

1:11:02 That tells me that the people who are a good fit, you already scheduled the call right away when you first started sending this stuff.

1:11:11 How are you? What are your plans too? So you do the two videos? Are you have any other marketing plans?

1:11:16 Yeah, I mean, so obviously we're doing the link that we do. We do reach out to LinkedIn business owner to me, even though it's obviously not like the focus on the CI.

1:11:25 We just connect with business owners offer them to open up our network and see if they're interested in talking. That's how we've gotten with a couple of conversations that we have in doing that and then the newsletter.

1:11:36 So that's what we're, that's what our marketing is. Okay. How many subscribers do you have for 1,700? 1,700. And what's your open rates, click rates, 39%.

1:11:47 The open rates, 39%. That's pretty good to what MailChimp tells me. What's your click rate? The click rate is not, like the click rate is not very high.

1:11:59 So what's the action that you want them to take after or reading the newsletter, ideally, if they're prospective clients. Yeah, so we've become a little bit more prominent in our call to action at the end of the newsletter about like to tying it back into whatever the topic is of the newsletter.

1:12:17 If this is something you'd want to have a conversation about, please click here, right? Or if you'd like someone to solve this problem or help you solve this problem, please click here.

1:12:26 Okay. Since you're doing the YouTube videos, Are you directing any traffic to the site or a landing page to sign up for your lead magnet or anything like that?

1:12:52 No, we're not doing that way. Like so not like other than, you know, like within the video saying like, hey,



check out our website building toward 12.com.

1:13:01 Okay, I would consider going to this, creating a specific landing page for the guide and including three to five different bullet points.

1:13:21 That explain or state the benefit of downloading the lead magnet to a business owner. Like, what are they going to get, are they going to figure out how to save on taxes so that they can put more capital to work for them, or are they going to, is it going to help them?

1:13:41 I mean, actually, it's good. It's good. It's good to talk to you. These are some really good benefits that are that we worked out were important to entrepreneurs and business owners.

1:13:54 So save on taxes and book more of the work, more of the wealth created by your business to work. If you could go through your lead magnet and identify anything that might align with any of this stuff and put it as a benefit bullet on the landing page, I think that would make a big difference because

1:14:09 you want to direct traffic to that page from your YouTube channel ideally and recommend that they download the lead magnet.

1:14:14 That way you can get more people on your list because it sounds like the newsletter list, you have a lot of people on it but people aren't taking the next step.

1:14:23 So you need to get some more people on it. It's probably where I'd start. Yeah, so we recently redid the lead magnets with the intention of trying, like doing something different and trying to drive it through LinkedIn is being, because we have a lot of connections on LinkedIn that are not on that email

1:14:37 list that are probably our perfect client, so. Do you have the landing page URL? I do not have it. I don't have it out.

1:14:46 Okay do you have one on one time with me scheduled no, but I can okay, I love to look at that one on one with you I think that would be helpful.

1:14:58 Okay. Okay. All right, Adam. Here we go. All right, so Adam, you're on FMG suite and you rate your site eight out of 10.

1:15:28 So talk to me. What? Like what questions do you have, what kind of for you? You talked to me a little bit beforehand, so I tried to do it. I did.

1:15:41 Greg, I was expecting you to blast my sight to pieces. And then I would have to defend it. So that's, I just wanted you to, you know, I wanted you to give robust criticism of it.

1:15:57 But my own hesitation is about it. I mean, I'll say what I like, right? Why do I give it an eight out of 10?

1:16:02 And I'm pretty much already said that in the former class that what I like about it is that somebody with a creative background is going to get a sense that maybe this is their tribe, right?

1:16:18 That my wife and I got the kind of inspiration from this that we went to an exhibition of an artist called Grant Wood in New York and we really liked his work.

1:16:30 And just with the theme of my story around the name of Wellaika and how I came up with that name and the resonance from my family just kind of resonated.

1:16:41 The grant would work resonated with Wellaika. Again, he's an artist, it's art, and so even though it looks like it could also be like a rest tomb kind of site or name being stretched right there.

1:17:00 So, but other than that, it's like, how can I put it? I know that it's kind of aesthetically pleasing so that my tribe might be attracted to it and realize that I that were different, you know, to other financial advisers and yeah so people tend to like it right but the problem with it is it doesn't

1:17:27 it's certainly although we say we work with people in entertainment or business owners it doesn't scream for instance entertainment right i mean if i was going to redo my brand completely i might change my name my my wife really doesn't want me to change the name but potentially I would change the

1:17:45 name. I would change all the imagery and if I was really going to go all in with the movie business, for the entertainment business, I would put entertainment business imagery up there, right?

1:17:57 Before I came across you and, you know, maybe now it'd be black and white words, right? I mean, that's what I thought you're going to tell me to do.

1:18:04 But if it wasn't going to be that, if I was going to use imagery, you know, have imagery of a film set or something like that.

1:18:10 Yeah, this is a great topic. So the way that you think about images is the images support the content. You want them to convey a certain thing, certain spirit that ideally resonates with your clients and kind of conveys what it's like to work with you.

1:18:35 And you had a really interesting thing that you share with me about your clients is that you said they're weird.

1:18:41 Yeah, I don't think they're weird. By the way, let me clarify, my previous, the office manager and my previous RIA, he described my clients as a way.

1:18:51 We can do eccentric, unique, interesting. The RT, I guess, if you're not RT, RT people can seem weird, and not even that RT, actually.

1:19:01 Yeah, I could see, typically I wouldn't recommend this, but you even shared with me that one of your clients Where's like funny glasses or hats or really eccentric stuff like this cool like in the advertising executive right architects



advertise They were always they don't wear like regular glasses

1:19:20 that generally colored, you know Yeah, I can always tell an architect that generally the ones who wear interesting losses So that's that's my that's kind of like my client.

1:19:29 I would consider Featuring maybe pictures of your clients that do a good job explaining with a picture, here's the type of people that we work with.

1:19:40 I think that sometimes finance can be seen as like, it's totally not, but it can be seen as boring or drab.

1:19:51 And I think being able to relate creativity, a creative approach to finance is a good thing to do, because of your type of people.

1:20:05 So any way that you could illustrate that, show instead of tell, I think is a good thing. What are some of the motivation behind some of the images that you picked?

1:20:14 Because I see like, this is a really cool, it looks like Italy or something. Yeah, it is Italy, you're right.

1:20:21 It wasn't meant to be Italy. The inspiration was this area in England that I come from and that is behind the story of the house.

1:20:31 It's two fence posts. What's that? The two gate posts. Oh, you watched. Yeah, I did. Oh, wow. Yeah. I would say that when I look at the images, it conveys more of like a nature vibe than a creative one.

1:20:55 Yeah. Does that make sense? Oh, I totally agree. Yeah. It's just more than it is. It's not so much it.

1:21:01 It's not that it conveys creative. It's just not off putting. Right. It doesn't look like a traditional financial advisor web, I say maybe to me, it doesn't look like a traditional financial advisor website, and it's seductive in a certain way.

1:21:21 It's this aesthetically pleasing, even if it's not creative, even if it's not like, yeah. Yeah, I need to ask you some more questions, but I feel like because of what you tell me about your clients highlighting the creative approach approach would be a good thing to do typically I wouldn't recommend

1:21:44 that. But any time, I'd be looking for opportunities to relate the creativity of your clients to the creativity that you express to your financial planning and wealth management process, because everybody's unique and everybody's different in your process facilitates that, which is probably one of the

1:22:01 reasons why your clients come to you, right? They feel at home. So that's what I'd be looking to convey on the site.

1:22:08 I think you're doing a good job with that. But it conveys more like nature than creativity with some of the images.

1:22:17 So I'm trying to be really nitpicky here, but those are some of my initial thoughts. Right, and I shared with you the podcast.

1:22:28 Oh, yeah, that's right. The podcast does like a way better job of branding. That's really quick. Yeah. Red carpet retirement.

1:22:38 And you know, I think of I almost think about rebranding as red carpet wealth, but it might just be two on the nose.

1:22:49 Sometimes having a different, so I call this sub-branding, if your podcast brand is different than your firm's brand, that's okay, like Benjamin Brand does this too, Adam does it too.

1:23:01 Sometimes you write it can be on a little two on the nose, and sometimes brands that work for a podcast don't necessarily work for conversion on a site.

1:23:10 How are you referring how are you getting leads from your podcast? Oh how am I getting leads from my my first challenge is to get the listeners.

1:23:22 So one thing at a time. Yeah. So that is you know, and I'm not great at all of this self-promotion kind of stuff.

1:23:31 But I mean, I was really, I was just sharing with Liz hand actually earlier that someone today that had been on my kind of spam blast that you know normally I wouldn't blast things out to everybody but the my podcast I do and this guy like pulled up in the parking lot rolled down his window and

1:23:47 said hey Adam love your podcast you know I just listened to the one on retire on real estate and I listened to the one on long-term care it's really excellent and I'm getting more and more of that kind of feedback that's good so it turns out I I guess the list is growing.

1:24:04 Well, we've been sure of that. And then I'll worry about conversions. Yeah. But our proposal of conversions, you know, you've been talking about websites converting.

1:24:20 I mean, I don't think my website kind of converts anybody and kind of it's all about SEO and I've wondered about PPC.

1:24:31 You know, FMG had a PPC strategy that they I was signed up for, but it went away about 18 months ago, and I've not been able to find another PPC person, even like for just taking my brand, and I was getting people reaching out to me just because they were Google Entertainment Financial Advisor, and

1:24:50 I'm not getting that so much anymore, and I wonder whether it was a PPC, and to what extent is my website, you know, I don't know, maybe they just find me SEO for the website, but I need to look at your analytics to get a better indication of that.

1:25:06 I do have a quick question about your branding on your podcast. This is really great, but I, and this is just an assumption, so it doesn't really tell me anything about the vibe that you shared with me that is unique to you and your



clients.

1:25:32 It feels kind of like more generic even though red carpet retirement, that's pretty catchy. That's kind of cool. But there's nothing that indicates unconventional creativity, uniqueness, individuality here.

1:25:48 And those are all kind of words that kind of come up in my mind when I heard you share with me your client experience and the types of clients you have.

1:25:56 Remember this is all about identity right when people listen to you and people work with you. I want to feel safe.

1:26:04 I want to feel like they're in the right place. So I have never listened to your podcast, but I'm probably I'm going to check it out.

1:26:13 Do you feel like there's alignment on the types of clients that you want and the content and the branding of the site.

1:26:22 The the branding of the book. I mean, I think certainly the imagery, I think they did a great job of the image and and and the name.

1:26:31 So in that sense, I think yes. You know, I think that my challenge is that working with the kind of clients I've talked about, like, you want to make this content entertaining and interesting, like they're phobic about this kind of thing, right?

1:26:49 So how do I connect with those people, with this kind of content. I mean, it's difficult enough with anybody, right, who's not in this world, trying to make them interested and engaged in this stuff.

1:27:02 But even more so with the, potentially with these, with my avatar client, right? Yeah, so that's a struggle, I would say.

1:27:13 So I try to make it entertaining, but I'm also real in the weeds guy. I just can't help but get in the weeds.

1:27:17 Most creative people are in the weeds. Oh, yeah, over the place. So we're going to get into the details, right?

1:27:27 I get in, I get probably too much into financial, like on the podcast, I have to kind of realize I got to stay, you know, whatever it is, 30,000 foot, right?

1:27:37 Rather than going 30,000 foot under the, yeah. So that so people's brains don't freeze. I'll just leave this last bit.

1:27:47 This is typically the first, So your show description is typically the first thing people read to decide they want to podcast.

1:27:57 And I would give them a hint in that description about the experience and let the person who is reading it feel like they're in the right place so creativity, creative people.

1:28:10 People who you feel like would be your ideal clients write that or your existing clients write the description to speak directly to one of your favorite clients.

1:28:19 Right. Well, I'll tell you what I was going for. And I was going for this in my mind, but actually one of my clients who is completely phobic and yet, and she isn't artistic.

1:28:28 And she listened to all of the podcasts. And she said that myself and my co-host, she said, you're like clicking back the tap at brothers for finance.

1:28:38 I don't know if you remember them. If you're old enough to know who they were. But they do you know who they were?

1:28:45 No, no. Okay, click on Clack. Well, it sounds really familiar. So they talked about like motor cars and engines, and I know nothing about that completely.

1:28:55 Yeah, disinterested, but they were so funny in talking about it on the radio that they would like to listen to.

1:29:02 Yeah, they were like the highest rate is radio show. Because everybody listened, even if you weren't interested in engines. And that's what I was kind of going for.

1:29:11 And I'm really surprised. She said that, and I would has a tape put it on there. What you're telling me doesn't convey it in the branding of the broadcast.

1:29:21 So I think that might be worth exploring or just thinking about it. But obviously a lot of people say they are anymore.

1:29:28 Well, that's fair enough. But you want a little bit of the experience of what it's like to listen to the podcast to come through in the branding and the show description.

1:29:37 So I do think that that's probably something worth thinking about. So I'm being really super nitpicky with you, but I hope some of that was helpful.

1:29:47 Yeah, absolutely. I think I got to make some big decisions about what I'm going to do. Well, if you want a brainstorm, glad to do that with you when I want.

1:29:57 Like, look at me like, yeah, I'm going to take you up on that one, man. Okay, cool. So two left.

1:30:03 Melissa is Melissa here. Melissa Joy. Is that you? No. Okay. Okay. I don't see another Melissa on the list. I don't see another Melissa on the list.

1:30:30 The last one, Sarah is Sarah around. I'm on virtual. Great. Okay, cool. Let's pull up your site. Okay. All right, Sarah, you're on WordPress.

1:30:47 You're rated your site seven out of 10. All right, so let's look at this. What can I do for you today?



1:30:59 How can I help you? What questions do you have? Yeah, thanks for taking the time, by the way. My pleasure.

1:31:07 So as you can probably tell, eventually, I work with primarily real estate professionals. I cannot use the word realtor FYI.

1:31:17 Right. Yeah. It's trademarked. And they don't like anybody using it. But I really enjoy working with them. My husband is a realtor.

1:31:30 I have, you know, there's not a lot of us to do, obviously, and I have a lot of inroads into that community, they are, as everybody in this room probably knows, really challenging people to work with, and they don't tend to have a lot of investable assets, which means means that to meet my minimum fee

1:31:55 , which is currently \$7,500, I'd like to increase it to \$10,000, they have to have pretty significant cash flow and be willing to pay that.

1:32:07 I have, in the last few this year, I've gotten several non-realtor referrals from realtors, traditional pre-retirees with, you know, one to five million in investable assets.

1:32:23 And they have been amazing clients, and I really want to dial that up, but without turning off the realtor spigot, quite simply because, I mean, I would like to increase my, I find that I'm able to do the best work with clients that have a net worth of at least two million, and ideally, at least half

1:32:51 of that is investible. And that are, you know, better like getting their tasks done, or lack of a better word.

1:33:03 Yeah, yeah. Yeah. In that really value life planning and that full like, you know, kind of life planning process, my other big strength is investment management.

1:33:16 And my not as big strength is tax planning, but everybody asks me tax planning questions all the time. And so what I really want are the clients that have enough income and assets to be really willing to have a good CPA relationship as well.

1:33:37 A lot of them do just, you know, they're kind of cheaping out on it. And so I want them to have enough, you know, income to feel comfortable paying both my fees and an appropriate CPA fee for their complexity.

1:33:51 Okay. So is your question about how to better target those people on the site, but also make sure you don't alienate potential retirement clients.

1:34:02 Yes, exactly. And I would love to attract more retirement clients. And frankly, I think most of them are going to come from realtors.

1:34:13 Some of the referrals I've gotten are not my clients. Like the realtor is not my client, but they know me from a seminar or whatever.

1:34:21 Okay. Yeah, their referrals are great. So the easiest way to fix that problem is just to include a little, at a little section on tier home page that says, not a real estate professional, we can still help.

1:34:36 And then include a call to action that goes to like, how you work with retirees, your pre-retirees, and that would also double as a landing page that if your clients were referring you retirement clients, then you could have them send you could refer them to that page specifically.

1:34:57 But that's just a really quick, easy way to solve the problem of alienating people without doing a lot of other work to your site.

1:35:06 Did that make sense? Yeah, where would you suggest putting that sort of thing? I would probably put it, let me see.

1:35:22 And I also know that I've got way too much text on here. Let me just see. Okay, so I'd probably put this on a new page.

1:35:31 And then so like all of this stuff right here, I put that on a schedule, a call page, and on the top of that schedule, a call page, I'd make sure you define your ideal client.

1:35:42 So you talk about two and two million investible. What? Make sure you add those. The three qualifiers to the to the page.

1:35:51 And then I would just put that. I've replaced this content with the. Are you not a real real real estate professional?

1:35:58 We still want. Help. We work with. And retirees too. So. And I. So I put that there. So yeah. So put this on its own page.

1:36:09 And then replace it with a section that speaks to retirees. One of the things I like about you is you have a specific, you have a specific niche for you're above the fold if you thought about ways you could be more specific, so I love like you have, you help people find their dream home

1:36:30 , we've helped you find financial freedom. Is it, do you think it'd be worth maybe to be more specific, like we help real estate professionals leverage their skillset to have more time freedom and income or something like that?

1:36:43 Is that something you thought about? What are your thoughts on that? The only thing I really thought about is that I feel like real estate professional is such a long word since I can't use realtor.

1:36:55 But I'm happy to workshop it. Yeah, real estate professional is a long word. Any other words that you could use that would they would identify with or self identify identify with?

1:37:14 So, probably at the very bottom, I don't have this prominent, I have my tagline, which is, don't fizzle your



financial plan.

1:37:24 I think you would be like that. FSBO is first sale by owner. Nice. Or don't fizzle your finances. So what do you mean by this?

1:37:37 So if you're a realtor, you obviously want your clients to use you, the professional, as opposed to, for sale by owner.

1:37:47 Yeah, that makes sense. So I see parallels between people wanting to work with a realtor to sell their house instead of doing it themselves.

1:37:59 I see parallels between people also choosing to work with a financial planner instead of doing it themselves. Right. So that's kind of what you're tapping into here, right?

1:38:09 OK. Do you have any lead magnets or like PDF downloads? I do. It is very old. It's that one. Advice, just reading.

1:38:26 And I don't get that many downloads and they're not typically super high quality. It does, I think it pops up.

1:38:33 I've had some issues with the pop up. Well, I think that if I were you, I'd focus on those things.

1:38:42 So I would create your, sorry, it's been a bit. So my brain's a little fried, but I would put this on its own page, your schedule call page, and I would replace this with a section that said not a real estate professional, we work with retirees too, or some version of that language, and then direct

1:39:09 them to a page that has more information about how you work with retirees. I think that based on what you share with me, that's probably the best input for your time for potential output to solve the problem with the least amount of effort.

