



BUILDING YOUR **MARKETING FUNNEL**



HI, I'M GREG



What we'll do today...

60-minute CORE training

Marketing Funnel
Fundamentals

30-minute Q&A

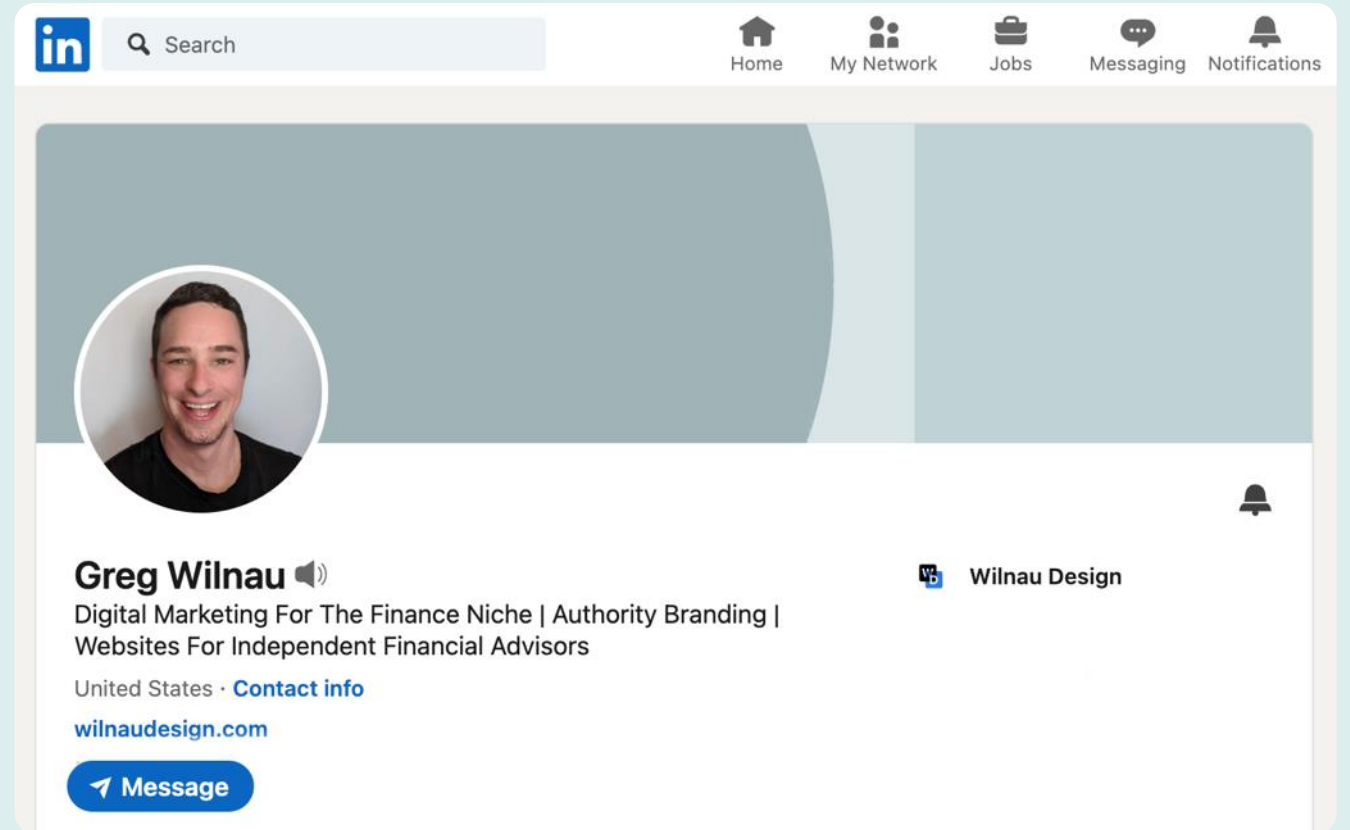
Define Your Ideal Client Avatar
Decide Your Preferred Communication Channel
Brainstorm 3 Lead Magnet Concepts

Next action steps:
Lifestyle Workshop pre-work

When we're finished...



Share your results
and/or questions
with me on LinkedIn
@GregWilnau



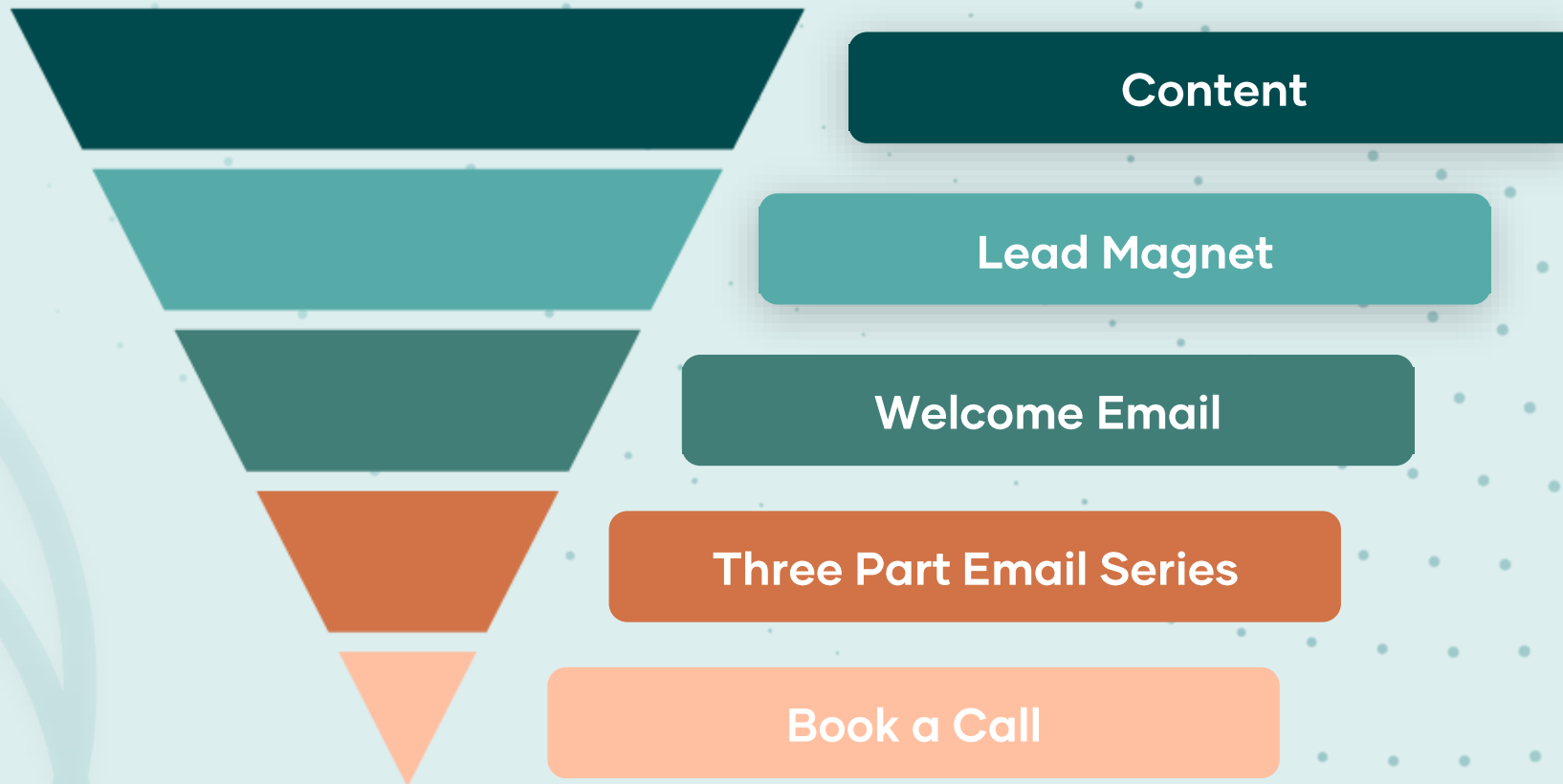
WHAT'S A
"MARKETING
FUNNEL"?



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WHAT'S A "MARKETING FUNNEL"?



TODAY WE'LL TALK ABOUT...



HOW TO GET PEOPLE "IN"



WHAT MAKES A GREAT LEAD MAGNET



MENTAL MODEL (TIPS, TRICKS, OTHER STUFF)

TOP

GET PEOPLE "IN"

Content for your ideal client



TRAFFIC






TOP: GET PEOPLE "IN"




- Get in front of the right people
- Content tailored to ideal prospective clients
- Podcasts, blog articles, live workshops, webinars, social media, etc.
- Content that makes signing up for your lead magnet natural next step

TOP: GET PEOPLE "IN" – CLIENT AVATAR

DEMOGRAPHICS

-  Age 50+
-  1MM+ Investable Assets
-  Low Expenses, Zero Debt

PAIN POINTS

-  Tsunami of RMDs
-  Surviving spouse lacks expertise
-  Time is limited/valuable



Building Your Client Avatar

DEMOGRAPHICS

- Profession (e.g., Optometrist, SLP, Dentist)
- Employer (e.g., Intel, Amazon, Qualcomm)
- Employment Position (e.g., Senior Developer, C-Suite)
- Compensation Type (e.g., W2, RSU's, Contractor)
- Marital/Dependent Status
- Age or generation (e.g., Millennials, Gen X/Y)
- Income
- Tax Bill (e.g., paying \$300,000+ in taxes per year)
- Savings rate or amount (e.g., saving 70% of income, maxing out retirement accounts)
- Business owner (gross revenue, # of employees, Pre IPO)
- Geographic Location

PAIN POINTS

- "Don't know what we don't know"
- Make work optional
- Organize and simplify finances
- Mitigating taxes while working
- Navigating/maximizing/understanding complex comp
- \$\$\$ stuck in business (how to sell a fund retirement)
- Career stagnant
- Starting a business
- Student loan debt
- Cash flow challenges
- Liquidity event, inheritance, death, divorce



How do I decide what content to provide?

Easy way to tailor your content to your ideal prospective client:

- Think about 5 questions your clients typically have
- Create content that answers those questions

TOP: GET PEOPLE "IN" - Templates

Framework to plan and create effective content

- 5 content archetypes
- Ideal content outline, starting point
- SEO steps to save time and avoid mistakes

Want the templates? Email greg@wilnaudesign.com and put "Send me the stuff" in the subject line



TOP: GET PEOPLE "IN" - CTAs

Calls to action (Sick of sky-high real estate taxes? Get our free guide here...)

CTA Tips

- Consider content of CURRENT page as CONTEXT
- State what the lead magnet is (guide, cheat sheet, ebook)
- Give a clear and specific next step
- Use an action verb (Get, Download, Grab, etc...)

Want to slip out of your Golden Handcuffs and plan for financial independence?

It all starts with a conversation.
Book a call with our CEO, Christine

[Book a Simplicity session](#)



Tech Equity Blueprint

Transform Your Equity into Lasting Wealth



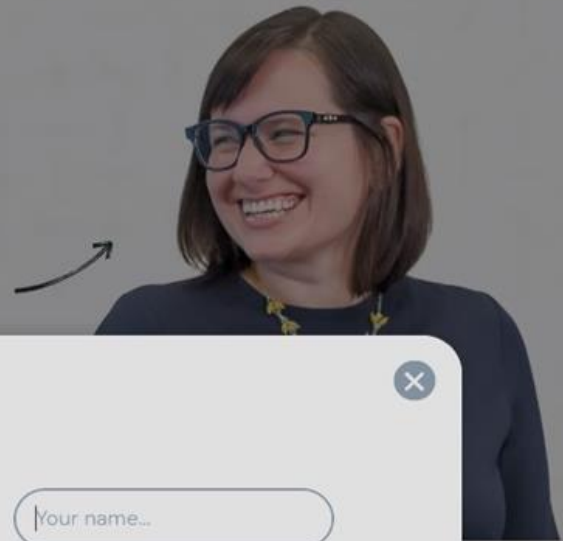
What if I'm not ready to schedule a call?

Download our FREE "Tech Equity Blueprint: Transform Your Equity into Lasting Wealth"

[Get my Free Blueprint](#)

Want to slip out of your Golden Handcuffs and plan for financial independence?

It all starts with a conversation.
Book a call with our CEO, Christine



We've prepared your guide for you...

...Just tell us where to send it

Send me the Blueprint

We respect your privacy and promise to keep your information safe.

Lasting Wealth



Ready to schedule a call?

Download our FREE "Tech Equity Blueprint: Transform Your Equity into Lasting Wealth"

Get my Free Blueprint

TOP: GET PEOPLE "IN" - Summary



CONTENT

Tailored to ideal prospective client



DRAW TRAFFIC

Podcasts, blog articles, live workshops, webinars, social media, etc.



CTAs

Position lead magnet as the natural next step



A GREAT LEAD MAGNET

Turn awareness into leads



A GREAT LEAD MAGNET

- What's a **lead magnet**?
- Qualities of a **great lead magnet**
- How to select a **topic** for your **lead magnet**



A GREAT LEAD MAGNET



What's a **lead magnet**?

- A free thing people exchange for their contact info
- Brings leads into your marketing funnel
- The equivalent of offering free samples at the grocery store

A GREAT LEAD MAGNET

→ Qualities of a **great lead magnet**

- Solves a specific problem with a quick win for immediate value
- Helps them save time and is easy to consume
- Condenses a lot of information into a single place
- Checklists, cheat sheets, templates, toolkits, guides, blueprints...




Not Ready To Schedule A Call Yet? That's Okay!

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90% Complete ✕



Jump-Start Your Retirement With My Ultimate Retire-Ready Toolkit

ENTER YOUR EMAIL ADDRESS TO GRAB YOUR **FREE** GIFT!

First Name

E-mail

SEND ME THE TOOL KIT!

Privacy Policy: We hate SPAM and promise to keep your email address safe

Tech Equity Blueprint

Transform Your Equity into Lasting Wealth



Christine Centeno, CFP®



"Last week, we got **8 leads**
just from our website."

Erik Young, AAMS®
Financial Planner, Valtinson Bruner Financial Planning

"We've **doubled daily sign-ups** to our
email newsletter in the first month since
the new site launched."

ADAM CMEJLA CFP®
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How do I select a topic for my lead magnet?

- 
- Do you have a process that clients find helpful or quickly solves a problem for them?
 - Have you created any tools or templates that you or your clients find helpful?
 - Do you have a unique angle/solution to a common problem?
- 

A GREAT LEAD MAGNET – In a nutshell



A FREE THING

People exchange for their contact info



SOLVES A SPECIFIC PROBLEM

And is easily consumable



THIS CAN INCLUDE

Checklists, cheat sheets, templates, toolkits, guides, blueprints...you get the idea



MENTAL MODEL

Tips, tricks, and
mistakes to avoid



MENTAL MODEL

- Keep it **simple**
- Prepare to be **ignored**
- Marketing online is **not** the **only way**
- Focus on one funnel:
12-month mental commitment
- Review the data so you know
what **isn't** working, and do less of it!

“It is a capital mistake to theorize before one has data.”

- Sherlock Holmes



Completed Tasks from the last 30 days

Parent Name	Task Name	Assignee	Status	Date Done
Milestone 2	<u>Landing Page - Design Review</u>	Dave McG	COMPLETE	3/11/2024
Milestone 3	<u>Local SEO - Citation / Directory Building</u>	Dave McG	COMPLETE	3/22/2024
Local SEO - FAQ drafting	<u>Gather Initial Answers / Interview</u>	Chase	COMPLETE	3/29/2024
Local SEO - FAQ drafting	<u>Draft FAQ</u>	Chase	COMPLETE	3/29/2024
Local SEO - FAQ drafting	<u>Draft Associated FAQ Blog Post</u>	Chase	COMPLETE	4/3/2024
Milestone 3	<u>Local SEO - Develop Content Strategy</u>	Dave McG	COMPLETE	3/15/2024
	<u>Milestone 2</u>	Dave McG	COMPLETE	3/11/2024
Milestone 3	<u>Keyword strategy</u>	Dave McG	COMPLETE	3/15/2024
	<u>Additional Retainer Tasks</u>	Dave McG	COMPLETE	3/11/2024
Maintenance Log - March 24 TC	<u>Create Maintenance Report</u>	Kiahna Vernon	COMPLETE	3/7/2024
Milestone 2	<u>Update GBP</u>	Dave McG	COMPLETE	3/7/2024
Milestone 3	<u>Review and align on Content Strategy</u>	Greg Wilnau, Dave McG, Chase	COMPLETE	4/1/2024
Milestone 3	<u>Landing Page - Build new Framework</u>	Dave McG	COMPLETE	3/28/2024
Milestone 3	<u>Landing Page - Draft updated Copy</u>	Chase	COMPLETE	4/3/2024

KPIs

GBP		Core Metrics		
Reviews	Interactions*	Backlinks	Organic Keywords	Appointments
2 (~)	42 (+9)	144 (-11)	96 (-5)	0

Position Tracking

MENTAL MODEL - Templates



Get the content template, funnel metrics tracker, and level 10 templates

Email greg@wilnaudesign.com and put "Send me the stuff" in the subject line

MENTAL MODEL – In a nutshell

- Keep it **simple**
- Be open to **experimentation**
- Marketing online is **not** the **only way**
- Focus on one funnel:
12-month mental commitment
- Review the data so you know
what **isn't** working, and do less of it!

NEXT STEPS: Lifestyle Workshop Pre-work

- 1 Define Your Ideal Client Profile
- 2 Decide Your Preferred Communication Channel
- 3 Brainstorm 1-3 Lead Magnet Concepts

NEXT STEPS: Lifestyle Workshop Pre-work

1

Define Your Ideal Client Profile



Include details such as demographics, psychographics, and key challenges they face



What are the top 5 most common questions your clients and prospective clients ask?

Define Your Ideal Client Profile (sample)

Use this to describe your ideal client profile. If you have multiple, repeat the exercise for each. While one profile is ideal, growing firms may need several.

MY IDEAL CLIENT
Use the space below to craft a short description of your ideal client profile.

PERSONAL (Age, Marital Status, Education...)

INTERESTS, HOBBIES & PASSIONS

PERSONA (Personality, relationship to money, etc.)

CHALLENGES, PAIN POINTS & FEARS

FINANCIAL (Income, investable assets, etc.)

GOALS & DESIRED OUTCOMES

CAREER & PROFESSION

OTHER

WHY THEY WANT TO WORK WITH OUR FIRM

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NEXT STEPS: Lifestyle Workshop Pre-work

2

Decide Your Preferred Communication Channel

- If you don't like being on camera, don't force yourself to do video
- If you don't like writing, don't feel pressured to blog
- If interviews and conversations aren't your thing, skip the podcast
- Choose a content medium you enjoy to set yourself up for success



NEXT STEPS: Lifestyle Workshop Pre-work

2

Decide Your Preferred Communication Channel

- Be open to trying new things and experimenting
- Focus on what you're good at and what you'll enjoy
- Which content channels do you prefer and feel most comfortable with (articles, videos, social media, etc.)
- Do you already have an audience somewhere?
- Don't fall into the trap of thinking you have to follow someone else's mold

NEXT STEPS: Lifestyle Workshop Pre-work

3

Brainstorm 1-3 Lead Magnet Concepts

- List ideas for your first lead magnet
- Narrow the list to 3



Q&A



Get the content template, funnel metrics tracker, and level 10 templates



Send an email to greg@wilnaudesign.com



Put "Send me the stuff" in the subject line

WANT A WEBSITE THAT WORKS? VISIT [WILNAUDESIGN.COM/LIMITLESS](https://wilnaudesign.com/limitless)