

# WEBSITES THAT WORK

## Action Steps

*Quick note before you start:*

For this exercise, you will use [chatgpt.com](https://chatgpt.com) or [claude.ai](https://claude.ai) to give you a place to start. At each step, you will enter the prompt to get AI-generated suggestions and ideas. Remember, AI is not a replacement for creativity or the strategy that can only come from in-the-trenches marketing experience. It takes hard work and persistence, but a website that works is 100% worth it!

### AI Tips

- Always review and edit AI-generated content to ensure it accurately represents your brand and meets your practice's specific needs.
- Don't expect it to be "right" the first time. Marketing is all about experimentation and iterative improvement.
- For best results, combine AI assistance with professional guidance to create a website that truly stands out and attracts ideal clients.

## 1 The "Perfect" Homepage: Craft Your Above-the-Fold Billboard

- a) **What You Do & Who It's For (Headline):**  
Write a clear, concise statement that describes your services and target audience.

Examples:

- "Financial Planning For Career-Professionals & Executives" (Milestone AMG)
- "Private Wealth Management For Business Owners And Their Families" (Topturn)
- "Plan Your Remarkable Retirement" (Destiny Capital)
- "Financial & Retirement Planning for Optometric Practice Owners (IPWM)"

AI Prompt



"I'm a [your profession] specializing in [your niche]. My target audience is [describe your ideal client]. Can you help me craft a clear and compelling headline for my homepage? For reference, here are some examples I like: 'Financial Planning For Career-Professionals & Executives', 'Private Wealth Management For Business Owners And Their Families', 'Plan Your Remarkable Retirement', and 'Financial & Retirement Planning for Optometric Practice Owners.'"

Your headline:

---



**b) Key Marketing Message (Sub-headline):**

Summarize the primary benefit or outcome your clients can expect.

Examples:

- "You Don't Have To Do The Heavy Lifting Anymore. Let Us Do It For You." (Milestone AMG)
- "Colorado's Full-Service Team Helps You Connect Wealth With Purpose & Plan Your Retirement to Its Full Potential" (Destiny Capital)
- "Manage Cashflow | Reduce Taxes | Invest Prudently" (IPWM)

AI Prompt



"Based on my headline '[insert your headline]', can you suggest a sub-headline that highlights the key benefit my clients can expect? For inspiration, here are some examples I like: 'You Don't Have To Do The Heavy Lifting Anymore. Let Us Do It For You.', 'Colorado's Full-Service Team Helps You Connect Wealth With Purpose & Plan Your Retirement to Its Full Potential', and 'Manage Cashflow | Reduce Taxes | Invest Prudently.'"

Your sub-headline:

---

**c) Call-to-Action (CTA):**

What's the #1 action you want prospects to take?

Examples:

- "Start Now And Talk To Us Today" (Milestone AMG)
- "Start Today With A Free Business Continuity Assessment" (Topturn)
- "GET STARTED WITH YOUR FREE 'REMARKABLE RETIREMENT' ROADMAP" (Destiny Capital)

AI Prompt



"For a [your profession] targeting [your ideal client], what would be an effective and specific call-to-action for my homepage? I'm considering ideas similar to these examples: 'Start Now And Talk To Us Today', 'Start Today With A Free Business Continuity Assessment', and 'GET STARTED WITH YOUR FREE 'REMARKABLE RETIREMENT' ROADMAP'."

Your CTA:

---

**d) Review & Refine:**

Read your billboard elements aloud. Revise as needed until they pass the "That's me. That's what I want. How do I start?" test.

AI Prompt



"I've created this homepage billboard: [Paste your headline, subheadline, and CTA]. Does it effectively communicate who I serve, what I offer, and what action to take? How can I improve it?"



## 2 The "Upside Down" About Page: Flip the Script on Your Client

### Identity Bullets:

List 5-7 questions or concerns that are top-of-mind for your ideal clients.

#### Examples:

- "There's a lot on your plate, and little time to manage finances."
- "Your money is all over the place (IRA here, CD there, 401(k) over there...)"
- "It's a total pain to coordinate different people to manage your money..."
- "...And you'd rather go to the beach than watch stocks."
- "When it comes to your money, there is no 'plan-b', you have to get it right."
- "Want someone with experience to proactively manage your assets so you don't have to."

#### How to start

1. Reflect on your initial client meetings. What questions or concerns arise?
2. Think about your ongoing client relationships. What issues do clients bring up repeatedly?
3. Consider your ideal client's daily life. What financial worries might be on their mind?
4. Identify the pain points your services specifically address.

AI Prompt



I'm a [your profession] serving [your target audience]. Based on my experience, here are some common concerns my clients have: [list 2-3 concerns you've identified]. Can you help me brainstorm additional questions or concerns that might be on the minds of my ideal clients, both when they first meet me and as we continue working together? I'm looking for ideas similar to these examples: 'There's a lot on your plate, and little time to manage finances,' and 'Want someone with experience to proactively manage your assets so you don't have to.'"

#### Your identity bullets:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



**a) What It Is (Intention/Result):**

Describe the outcome or value of the call in one sentence.

Example:

- "A 3-step process to help you evaluate our services and make an informed decision about working together."

AI Prompt



"I'm a [your profession] offering [your key service]. How can I describe the outcome of an initial call with me in a way that's compelling and value-focused? For reference, I like this example: 'A 3-step process to help you evaluate our services and make an informed decision about working together.'"

Your description:

---

**b) Who It's For (3 Qualifiers):**

Identify your ideal client identity, value, and mindset.

Examples:

- Identity - "Business Owners or Health Care Practitioners in private practice" (Topturn)
- Value (monetary metric) - "Accumulated total assets of \$1,000,000+ or looking to get there quickly with the right help" (Topturn)
- Mindset - "Want the help of a financial professional instead of 'winging it' alone" (Topturn)

AI Prompt



"Can you help me define three specific qualifiers for my ideal client? I'm a [your profession] targeting [brief description of your target market]. For inspiration, here are some examples I like: 'Business Owners or Health Care Practitioners in private practice', 'Accumulated total assets of \$1,000,000+ or looking to get there quickly with the right help', and 'Want the help of a financial professional instead of 'winging it' alone.'"

Your ideal client identity: \_\_\_\_\_

Your ideal client value: \_\_\_\_\_

Your ideal client mindset: \_\_\_\_\_



**c) How It Works (1-3 Steps):**  
Outline your unique discovery process.

Examples:

- Step 1 - "20-Minute Call"
- Step 2 - "Your 'Remarkable Retirement' Roadmap™"
- Step 3 - "Putting Your Personalized Plan Into Motion"

AI Prompt



"I want to create a unique discovery process for potential clients. As a [your profession] serving [your target audience], what 3-step process would you suggest to make my approach stand out? For reference, I like this example: Step 1: '20-Minute Call', Step 2: 'Your 'Remarkable Retirement' Roadmap™', Step 3: 'Putting Your Personalized Plan Into Motion!'"

Your process:

- Step 1 \_\_\_\_\_
- Step 2 \_\_\_\_\_
- Step 3 \_\_\_\_\_

