

[PDF] Effort-Less Marketing For Financial Advisors

Steve Moeller - pdf download free book



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Description:

About the Author For more than a decade, Steve Moeller has helped entrepreneurs build profitable and rewarding businesses. As president and CEO of American Business Visions, Steve is a sought-after speaker, consultant, business strategist, and writer for financial industry trade publications. Steve started his career in the advertising industry. In the early 1980s, he entered the investment industry and soon became an award-winning salesperson and eventually a successful marketing executive. Today he focuses his talents on American Business Visions, a publishing and training firm

he founded in 1989. The company creates marketing tools and business development systems for financial advisors and investment companies. His unique business development process, best defined as relationship-based niche marketing, has become known as the "Moeller Method." This turnkey system enables advisors to identify and attract clients who are both profitable and fun to work with. Steve believes that evolving technologies and consumer expectations are creating huge opportunities and challenges in the retail investment industry. He is committed to helping financial advisors transform their businesses into highly competitive, client-centered organizations.

Excerpt. © Reprinted by permission. All rights reserved. STEP 2: TARGET PROFITABLE MARKET NICHE Pretend for a moment that you're a prospector looking for gold. You could try your luck panning in the nearest riverbed. Or you might try to improve your odds by prospecting in a riverbed where others have discovered gold. But most rivers have been panned for more than 150 years. All the "easy" gold has already been found. You would be lucky to get even a modest monetary return for your efforts. A more sophisticated prospector would focus on discovering the source of gold. Once the veins of solid gold were located, gold nuggets could be mined efficiently all day long. Meanwhile, the other prospectors would be down in the riverbed panning for flakes. Discovering your source--rich niches--is what Step 2 is all about. Packed with valuable research data, chapters 4, 5, 6, and 7 illustrate the power of niche marketing. Starting with a look at the big picture--the universe of everyone who could conceivably be a prospect--you'll learn how market segmentation can help you identify the specific community of individuals who will benefit most from your services. Because these individuals are in the same niche, by definition they have similar hopes, concerns, and needs. So keeping them happy is simple. By focusing on a single niche--or even a couple of niches--you'll quickly become an expert at identifying, attracting, and helping people in that group. Focusing and narrowing the scope of your business this way will help you master the effort-less marketing process. SECTION PREVIEW Take advantage of the five benefits of targeting. Identify the top 20 market segments for financial advisors. Apply the 80/20 rule to your current clients. Uncover the two to three niches that you'll make the most money in and have the most fun with. Profile your ideal client. Use the Ideal Prospect Profile to find high payoff prospects.

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