

Turning Insights into a Growth Multiplier

It can be time- and labor-intensive to constantly be looking for new leads, especially considering all the other activities that go into running a business.

Chad Coe dabbled in many outsourced lead gen companies over the years until he discovered SmartAsset's matching services through Cetera's LeadEngine offering. "It's by far the best introduction service for lead prospecting," he says. Success was not immediate—it took Chad 9 months after launch to close his first client.

THE SOLUTION

Over the past two years, Chad made various changes to his lead campaign as it pertains to his monthly budget, preferred asset tiers, and overall lead volume. Analyzing performance along the way, he noted the following insights which have contributed to his success:

- Give yourself enough "at bats" and a long timeline. This means setting a budget that guarantees strong lead volume (receiving at least 10 leads per month). Chad has increased his monthly budget by 350% since starting. It's a numbers game; for every 25-30 leads you receive, 5-6 will talk to you, 2-3 will meet with you, and 1 will become a client. It can take anywhere from 1 -9+ months for the average lead to close.
- Be consistent in your weekly phone calls. Chad doesn't call every lead each week, but he does continue to reach out consistently in multiple channels (phone, email, and text). He also notes that calling at different times of the day and different days of the week has made a positive impact on reaching leads.
- Target higher asset tiers to ensure you are speaking with clients that have assets to move. Chad specifically sets 70% of his budget to target the \$1M+ asset tier.

With Cetera's reimbursement opportunity through LeadEngine, Chad has qualified for 100% reimbursement of lead costs as a result of the advisory assets he's closed. Chad plans to continue allocating budget toward LeadEngine—his prospecting is more efficient and successful than ever before, and in the end, he gets back what he spent!

Net new AUM
from LeadEngine

\$29M

Net new clients
from LeadEngine

22

Assets in pipeline
from LeadEngine

\$20M

Figures as of 8/10/22

Accelerate Your Growth.

Contact the Business Development team at 800.336.8842 to learn how you can grow with Cetera.

"I wish I did this 20 years ago. In the last year since using LeadEngine, I've brought in more assets and have a larger pipeline than ever before."



Chad Coe*

President and CEO
Coe Financial Group
Cetera Advisors LLC

Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.

“Cetera Financial Group (Cetera)” refers to the network of independent retail firms encompassing, among others, Cetera Advisors LLC, Cetera Advisor Networks LLC, Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors), Cetera Financial Specialists LLC, and First Allied Securities, Inc. All firms are members FINRA / SIPC. Cetera Financial Group is located at 655 W. Broadway, 11th Floor, San Diego, CA 92101.

*Registered Representative offering securities through Cetera Advisors LLC, a registered broker/dealer, member FINRA/SIPC. Advisory services are offered through Cetera Investments Advisers LLC, a registered investment adviser. Cetera firms are under separate ownership from any other named entity.