



How Educational Marketing (and a Little Patience) Landed Me a \$1 Million Client

May 12, 2023 / By Kelly Olczak

What's Working Now: Within minutes after a webinar on the SECURE Act, an attendee called to move his \$1 million account over to this advisor. “What made you make the move?” she asked. He answered in one word: “Education.”

In this edition of What's Working Now, an AdvisorRADIO feature in which Horsemouth members tell us about recent success they have had running and growing their businesses, we hear from advisor Kelly Olczak, who has found that consistent drip marketing with educational content created great webinar attendance—and landed her an impressive new client.



The following article is an edited version of Kelly's comments. For the full interview, check out the video below.

31:30

It all starts with drip marketing

Quick Overview

So I've been working with a marketing firm called Social Advisors for many, many years. And about 18 months ago, we really started focusing on how to do outreach to folks that don't know about us. So, we worked really hard to figure out who was a good fit for our firm 'cause we don't work for everyone. Then we built a strategy around attracting those people with content.

Advisor: Kelly Olczak
Rochester, N.Y.

Years in business: 18 years

Firm: LynnLeigh & Company

What's working now: Drip marketing and educational content targeted to both a broad marketing list and a shortlist of ideal prospects.

When we found Horseshmouth, what I was looking for was CFP-level content that I don't have time to write. So, we started leveraging the Horseshmouth content with our drip marketing. We use a platform called SharpSpring through Social Advisors. That platform is very helpful, because it helps me understand the stuff I'm putting out there, what people are coming back to. So, we learned and we really knew that taxes, social security and Medicare was something that people want to be educated on.

The hand-written note

So, we continue using Horseshmouth content to drip on people, sharing with them articles on tax planning, IRA planning, that sort of thing. And obviously, we do a lot of digital stuff. So of course, we advertised our first SECURE Act 2.0 webinar to our [email list of 700 or more leads](#) digitally.

But then out of those, I've narrowed it down to 65 people that really come back a lot. So, what we've also been doing with the Horseshmouth stuff, is then quarterly I'm sending out drips—[handwritten notes](#). Actually, I'm really right now sending your article "the five tax-gotchass." So, I am sending these 65 people a handwritten note and separately the printed copy of the article, both in handwritten envelopes.

So, I have a letter that goes out to them that I sign at the bottom. And if it's somebody that I've really met, I've got one right here that I'm going to send out today, I will add "I miss you guys" or something else personal. So they know that it's really me doing this.

Yeah, it takes time. I mean, it's a commitment. I have to cut out time throughout the months to get these things done. But it matters, and it

"As they say, it's not timing the market, it's time *in* the market. Same thing with marketing to people, if they're the right subset."

works. It's weird that it works, like I don't believe it works, but it does!

Well so far, they've gotten two this year, they'll get another two. I want to focus on these people for a while, right? So it's getting traction. As they say, it's not timing the market, it's time *in* the market. Same thing with marketing to people, if they're the right subset right?

Tracking what prospects are interested in

You see them connecting with your digital platform. I would love to be a fly on the wall when they get their first one note, like "Whoa, wait a minute. This person knows what I'm clicking on, meaning she knows that I like social security or I'm worried about taxes." Kind of creepy, too, but it works and I know it works.

It's also, I think really important to be kind of funny in that first letter, because I'm sending it out to people that have not started working with us. My opening line is, "OK. Let's talk about the elephant in the room. I know you're not a client, I know you're probably working with somebody. If you're reading this letter, thank you." Then I go, "Many advisors will say they're different, but I want you to experience what the LynnLeigh client experience feels like."

My marketing team, Social Advisors, they taught me that there was this platform called SharpSpring. I never believed that this would work, because before, you just put content out to the ether and you don't get anything back. But what they taught me was that with the platform that we're using, you could see Mr. Smith clicking on a link. And you see he always tends to click on things that are sort of Social Security-related or tax-related. So that's really helped me focus on what kind of drip he gets. And he hasn't called me up, but I see he's still clicking and I know he got the handwritten note. Then it's...OK, you've got to be patient.

Why I chose to use Horseshmouth's SECURE Act 2.0 webinar

SECURE Act 2.0 is really exciting, and I never get excited about any retirement legislation. But it was very creative and there were so many ways this act could help so many people at different ages which I got really excited about because we help, and we manage about 93 families' finances in the area. Out of those 93, 45 families are probably 90% of our business but the others are those millionaires in the making. Also, think about the kids and the 529s. It's covered so much. So it was a no-brainer to start there because I could talk to grandma and grandpa and mom and dad and the kids.

Then when we saw this seminar on SECURE Act 2, the marketing team really helped us elevate the webinar opportunity, [get the messaging out there](#). We also leveraged Zoom for their webinar side and sent out drips and also messages about these being the reasons you should join us. And we got 47 people to sign up on Zoom. On the day of, I had 23 people show up! That's pretty darn good. We never had that, no. You normally get 43 people that say they're showing up and you get eight people. We had 27 people show up, and 23 stayed for the duration.

A surprising result

So out of the folks that joined us live for the seminar, there were two people in there that I've been dripping on for literally nine years. And it was nice to see old faces or old names. Right? Literally we got off the webinar and I was tickled; I was like "That wasn't hard at all."

I was very worried because the content was pretty complicated, so you had to practice it a lot. There's a lot of content in the SECURE Act Seminar, so I practiced for two weeks until I felt comfortable. Also, we had to pick and choose which slides to include, to be sure we stayed right within one hour, which I did, including allowing a few minutes for latecomers to get in. We decided to do it at lunchtime, 12 noon on a Thursday.

"There is no competition for second place. Can I please treat you like one of our best clients? So you know how we handle things?"

Anyhow, so I was really, really happy with how it felt. I felt genuine and I knew that I was presenting in my traditional Kelly manner. Well, literally five minutes after we got it off this gentleman called me that I was totally not expecting.

I expected that I was going to get off a couple of days, make phone calls and follow up. But he called me first—and I mean that was a million-dollar client we just closed with that webinar!

I asked him why, because I remember sitting with him when I was at Edward Jones nine years ago! And I said, "You've been with the same person for years, what changed?"

And he said, "Education." Which was enough confirmation for me that we're doing and focusing on the right things.

Have patience

There was a piece of research and I apologize I don't know where I saw it. But it was this graph. On one side it was advisor activity and the other side was a client appreciation of such activity. And it was like these two lines crisscrossed. So the advisor is dripping, dripping, dripping and they're getting more and more frustrated. Right? Because they're not hearing anything. But at the same time, the client is thinking, "Man, this person is consistent and hitting it."

But where the advisor drops off is just about where the client's ready to go, "OK!" That drove me nuts, I was like, "Ah, OK!" It's my professional belief that patience is hard, right? There's no instant gratification in this job, right? You've got to take a lot of "No's." The more value you give, the more education you give, the more credibility you have. Nine years is a long time to wait, but this gentleman called me that day, and set up an appointment for the next week.

We had the discussion, and we're in the process of moving accounts—which by the way blows my mind because that's not how normally it works. Right?

You have got to work for it. And over these nine years, I've always invited him to our client appreciation events. I've always kept him in the loop when the market's terrible or excellent or whatever. And I really liked him. So that whole time, I just figured well, it's going to cost me one more stamp, who cares? It works!

If I feel that if people are a good fit for me and they may not be ready, that's what we start doing. It's literally sharing with them... So, I have a saying, "There is no competition for second place. Can I please treat you like one of our best clients? So you know how we handle things."

Following up with other webinar attendees

Of course, getting someone who immediately calls like that, that is an anomaly. I would love to say that's going to happen every time. And I'm really glad it happened the first time I gave this webinar, because I really needed that shot in the arm. But again, there's a process. There is the beginning (the drip marketing, the announcement), the event, and the end, the follow-up.

So the follow-up: We sent out two emails, (1) "Thank you for attending" and (2) "Sorry we missed you." Right? So the 40-something folks that signed up, they all got the replay and two Horseshoek handouts that were really nice—the notes, so they didn't have to take notes and then the rules. And so those were wrapped into both of those emails.

What was neat was we could see, using Zoom webinars, we could see the folks that got the, “Sorry we missed you” email, those people actually came in and downloaded the video. It was awesome! I know earlier I said this tracking was kind of creepy, but it helps you figure out if you’re hitting the mark. Some people couldn’t make it at lunchtime. So I was able to do this once and put it on our website and then I can also see who comes in and looks at it again.

IMPORTANT NOTICE

This material is provided exclusively for use by Horseshmouth members and is subject to Horseshmouth Terms & Conditions and applicable copyright laws. Unauthorized use, reproduction or distribution of this material is a violation of federal law and punishable by civil and criminal penalty. This material is furnished “as is” without warranty of any kind. Its accuracy and completeness is not guaranteed and all warranties express or implied are hereby excluded.

© 2023 Horseshmouth, LLC. All Rights Reserved.