3. The Marketing Funnel

Think of it like this: We cast a narrow net in specific profitable areas to potential leads, then carefully guide them towards you, our expert agents.

1. Awareness (Top of the Funnel):

- **Google Search is our main fishing rod:** People searching for mortgages, insurance, or other financial products on Google find us through our targeted ads and optimized website content.
- **Landing pages reel them in:** These pages provide valuable information about specific financial needs and capture leads through forms with qualifying questions.

2. Interest & Consideration (Middle of the Funnel):

- **Instant qualification:** We swiftly assess the lead's information and verify their phone number. This ensures we're passing on high-quality, genuine leads.
- **Exclusive delivery:** Each qualified lead is instantly and exclusively handed off to one of you. No sharing, just a direct connection to a potential client.

3. Action & Conversion (Bottom of the Funnel):

- **This is where you shine!** You take the lead, engage them via text, build rapport, and schedule a consultation.
- **Your expertise converts:** You understand their needs, provide tailored solutions, and guide them toward securing the right financial product.

4. Loyalty & Advocacy (Beyond the Funnel):

- **Happy clients, lasting relationships:** You deliver exceptional service, building trust and loyalty with your clients.
- **Referrals and repeat business:** Satisfied clients become your advocates, referring new leads and returning for future financial needs.

Key takeaways for our agents:

- **Focus on personalization:** Leads are coming to you "warm" and ready to engage. Respond quickly, be attentive, and tailor your approach to their needs.
- **Highlight your value:** Remind leads that they're receiving exclusive access to an expert advisor through FinanceVine.
- **Leverage technology:** Use texting and scheduling tools to minimize friction and make the process seamless for leads.
- **Continued optimization:** Based on your ROAS data, we will continue to optimize the campaigns

Together, we create a powerful funnel that delivers high-quality leads and empowers you to build successful client relationships.