



Alan B.

## Relationship Building

How **Alan** Converted **Leads into Clients** with **Automation Engine's Consistent Content Scheduling Strategies**

Alan's team faced a common challenge: **maintaining a consistent schedule of content delivery without draining its time and resources.**

The struggle to produce engaging, relevant financial content while juggling daily operations left it searching for a streamlined strategy.

Enter Automation Engine, which introduced the office to an innovative approach and strategic consistency. With AE Digital handling its digital efforts, including a Retirement Readiness Quiz on its website, the office was able to establish a reliable content schedule.

**This consistent strategy keeps leads warm and nurtures potential clients effectively.**

The results speak for themselves. By sticking to this schedule, Alan and his team managed to schedule 10 appointments, with nine individuals coming into the office to meet in person. Out of these, the office **successfully converted two new clients**, capturing significant assets and helping solidify valuable relationships.

The office's resourceful strategies enabled them to maintain a powerful presence with minimal effort, helping to assure that a well-executed content plan can help drive substantial business growth.

### Most Successful Prospect Engagement:

Investment Opportunities in Volatile Markets

Audience **2,904**

Open Rate **35%**

Appt. Requests **7**

Conversion Rate **11.48%**

### Most Successful Lead Generation:

Hidden Tax Opportunities

**1,565** Audience

**38%** Open Rate

**2** Appt. Requests

**7.54%** Conversion Rate

### Most Successful Paid:

Alan B. Book Campaign - Facebook

Audience **97**

Open Rate **50%**

Appt. Requests **16**

Conversion Rate **19.46%**