



Chris M.

Trust Built

How **the Office** Helped **Build Trust** and **Client Engagement** with **Automation Engine's Consistent Visibility Strategies**

Chris encountered a common challenge in the world of financial services: **converting interest into tangible appointments.** Chris has understood that growth doesn't always follow a conventional path.

Using Automation Engine, the office has adopted a strategy that emphasizes consistent visibility across various platforms, including emails, TV and digital ads.

Rather than relying solely on campaign forms, the office focused on maintaining a presence that prospects could trust and recognize over time.

This adaptable approach proved to be a **game-changer.**

The ongoing exposure helped cultivate familiarity and trust, leading to prospects independently picking up the phone and calling the office.

This engagement demonstrated the power of strategic presence, showing that **while not every interaction led to an immediate conversion, the foundation was being consistently built.**

Chris' story is a testament to the effectiveness of being consistently present and strategically visible, helping demonstrate that meaningful connections can develop in unexpected ways and lead to long-term progress.

Most Successful Prospect Engagement:

2024 Hidden Tax Opportunities

Audience **1,044**

Open Rate **29%**

Appt. Requests **4**

Conversion Rate **20%**

Most Successful Lead Generation:

Retirement Income Teeter-Totter

829 Audience

32% Open Rate

1 Appt. Request

14% Conversion Rate

Most Successful Paid:

Riskalyze Lead Generation Campaign

Audience **131**

Open Rate **28%**

Appt. Requests **6**

Conversion Rate **10%**