



## DEAL FLOW PIPELINE

How to get more leads,  
appointments and clients.



# Hi!

I'm James McCracken

I help mortgage brokers who are not getting the leads or settlement volumes they want to. I help them create more demand, sell through service and optimize their time so they can have more money, meaning and control.

This short guide will show you how.

*James McCracken*

# Lead Generation

Generating deal flow is critical if you are to reach your settlement volumes and income goals.

The approach you ultimately take will be influenced some key variables, and this document will help you consider each of these so you build a system and approach to lead generation that is sustainable and effective.

In today's marketplace, it's easy to be swayed into thinking everything needs to happen online, but before you decide which channel and approach is best for you, it's important to consider each of the 3 core options...

**FREE**

- Client referrals
- Social media
- Build authority

**PARTNER**

- Strategic partners
- Cross Promotion
- Leverage Trust

**PAID**

- Digital
- Offline
- Scale up

Each channel comes with unique benefits and challenges and this document will walk you through the key things you need to consider so you build a marketing and lead generation machine that works for you.

# Lead Generation

## Free

There are many sources to generate free leads, with client referrals being the highest converting. Referrals are fantastic, though can be unpredictable during the early stages as you build your customer base and reputation, which is why most brokers add other channels to boost lead volumes.

Also, though free leads don't have an actual 'dollar cost', there is typically a **cost of time and effort invested into building relationships and trust.**

Free leads often have a snowball effect. They start out small and progressively build momentum as your database of clients and raving fans grows, and as you build your personal brand and reputation as an expert adviser.

Here are the key sources of free leads...

**Client Referrals:** Referrals will never ever go out of fashion

**Blog:** Producing content and building your authority status

**Website:** Creates an online shop front for your business

**Facebook:** Posting on your personal page, company page or private groups

**LinkedIn:** Posting on your news feed and writing articles

**Instagram:** Build a compelling brand and profile through Instagram

**Free leads are worth their weight in gold,** though may need alternate leads sources to provide more month-to-month consistency and control.

# Lead Generation

## Partner

“ Strategic partnerships are typically based on a shared set of values. ”

Partnering can be a highly effective way to drive new business enquiries by leveraging the trust that's been established by the partner with their network.

At it's best, it can drive literally dozens (or more) leads into a business overnight, or it can take a while for the relationship to find it's rhythm.

You will find the best source of partners will likely come from within your existing network of people who know, like and trust you – and it's worth exploring how to turn these into profitable relationships before seeking new partners who you may not currently be known to.

Variables to consider through this strategy include:

Who in your network also services your target market?

What does a mutually beneficial relationship look like?

How can you 'give back' to the relationship?

Does the other partner want or expect to be paid?

If you pay, do you a % of your up-front, or trail, or both?

How do you promote each other into your networks?

While some relationships will take longer to flourish, when they do, they can easily add 6-figures to your income, so play the long game at all times.

# Lead Generation

## Paid

“Paid traffic can quickly create scale and hands-off consistency.”

A popular strategy is to build an online funnel by providing prospects a free resource in exchange for providing certain contact details.

More details usually produces fewer leads with a higher conversion. If you can't get an appointment immediately, you should nurture leads through an automation sequence of education based content.

With many variables to paid campaigns such as ad design, landing page setup, sales copy and integration with an auto-responder, you need to consider if it's worth your time and effort to learn these skills or to get an expert to help you

The most commonly used paid platforms:

**Facebook:** Extremely popular platform right now for paid advertising

**Google AdWords:** Very effective though fraught with danger if you get it wrong

**Google Ranking:** Help position yourself as the preeminent local broker

**Email:** not a 'paid' platform in the true sense, though, an important tool

**Sponsorship:** Such as a local football club.

**Direct Mail:** Can be effective with a well written letter & structured campaign

Most times, you will achieve superior results with higher conversions by leveraging less platforms in a more effective way than spreading yourself thin.

# LOAD & LAUNCH...

Clients of The Successful Adviser have successfully used all forms of marketing to increase their settlement volumes by between \$1 million to \$5 million per month.





## Deal Flow

At the start of this short guide, you saw a diagram that showed you the core channels for build your lead generation machine.

If you want to take and install the **Deal Flow Pipeline** process into your broking business, the next step is to join The Successful Adviser community.

It's a community for mortgage brokers who want to generate more leads, help each other out, and run a thriving broking business.

To see if this is for you, go to:

[thesuccessfuladviser.com/go](https://thesuccessfuladviser.com/go)

