



Beneficial
Trust & Will Company
By Professionals For Professionals

10 Ways To Drive Estate Planning Leads In 2024



Quick Intro to Richard


- Set up and grown 8 businesses over the past 28 years, including Digital Media Edge, as digital marketing and growth agency.
- CEO and Founder of Ignite Growth Consultancy Ltd
- Working alongside Amy and Trevor to build BTWC.
- Author of Amazon #1 Best Selling book “Remarkable Business Growth”
- Owner of Leadnamic Software <https://leadnamic.com> – Let me know if you want a free trial 😊
- Email me on richard.mawer@btwc.co.uk
- Connect with me on LinkedIn – Scan QR code below:



What we are going to cover today

- Do you need more leads?
- Generalist vs Specialist
- Who are you targeting? Attracting a “good fit” client
- Existing Website Traffic
- The importance of Google My Business
- Using Facebook to generate leads
- Client Referrals
- Partner Referrals
- Local Networking
- Live Events
- Creating A Blog – SEO Optimisation
- Online Directories
- Paid Lead Generation Ads – Facebook vs Google
- BONUS #1 - Using CRM & Email Marketing
- Q&A





Do you need
more leads?



Have you fixed your leaky bucket?

Stop and think about your existing traffic and lead sources and ask yourself the question – Do I have a lead problem or a conversion problem?

I want you to think about three things before you start investing more time and money in generating NEW leads.....

- **Existing Clients** – Are they in a CRM or database? How often do you engage with them? How often do you conduct reviews?
- **Witnesses**– Do you collect witness details, name, email every time and then engage with them via email or SMS text?
- **Your existing website traffic?** Is it converting at 2% - 5% into leads? (more on this later)

Fix you leaky bucket first before you start pouring more opportunities into it!



Positioning - Generalist vs Specialist



- ✓ Markets to everyone – broad and wide targeting.
- ✓ Seen as a “jack of all trades”
- ✓ Needs to constantly market to attract people.
- ✓ Seen as one of many similar offerings
- ✓ Will end up competing on price



- ✓ Targets a particular person – narrow and deep in a sector.
- ✓ Seen as the expert
- ✓ People come to them
- ✓ Seen as the best
- ✓ People are happy to pay for them

If you can write a positioning statement covering “Exactly who you help, how you help them and why you do it better than anyone else” – you will be seen as an expert or specialist.

Example – “I help business owners in the Bristol area who are short of time to assess and protect everything they have worked hard for by putting in place the right will and estate planning. Ensuring they protect their loved ones from whatever life throws at them. Over the past 15 years I have helped hundreds of business owners achieve the peace of mind that this brings for them and their family”



Attracting “good fit” Clients

Not every lead is equal. The secret to effective marketing and lead generation is targeting the right “good fit” people, understanding where they are and getting in front of them with the right messages.

What does your dream customer look like?

- Age
- Gender
- Location
- Interests
- What are their problems, misconceptions and prizes?

Where are they already congregating?

- Who do they follow?
- Where do they get their information?
- Who do they trust?
- What events do they go to?
- What organisations do they belong to?



The 3 Sources of Traffic & Leads

Traffic You Earn

This is generally traffic you are not paying for with money but with your time. You don't control this traffic.

You are trying to get in front of other people's audiences who are your dream customers.

- Guest blog post writing
- Social media mentions
- Social shares
- Reviews
- Search Engine Traffic

Traffic You Pay For

Paying for ads and traffic is a quicker way to grow. It is traffic that you control and can send to destinations you own.

You are paying to get in front of your audience of dream customers and get their attention.

- Google Ads – Keywords
- Facebook Ads – Geo and Interest targeting.
- Display and Banner Ads
- Magazine Ads

Traffic You Own

The most valuable traffic and lead source is the traffic that you own.

You are not relying on anyone else or paying for it.

- Your Website
- Email Lists – The money is in the list!
- Social Media Channels
- Content – Your blog posts, videos, live shows and podcasts.





10 Lead Generation Strategies That Work



Your Website Is At The Heart Of Everything



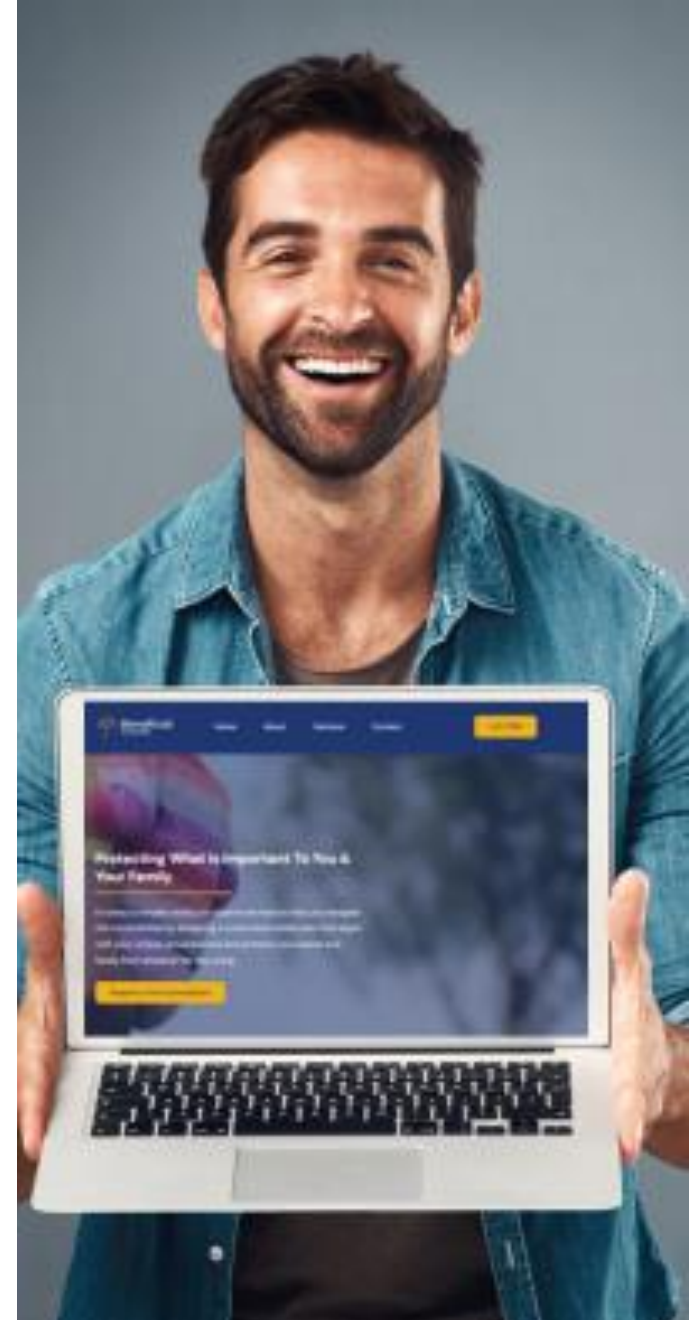
#1 - Optimise Your Website

As discussed, your website must be optimised for conversions, as you will be sending traffic to your website from multiple sources, both offline and online.

People will be researching you online before they meet you – so get this right!

My advice for optimising your website is:

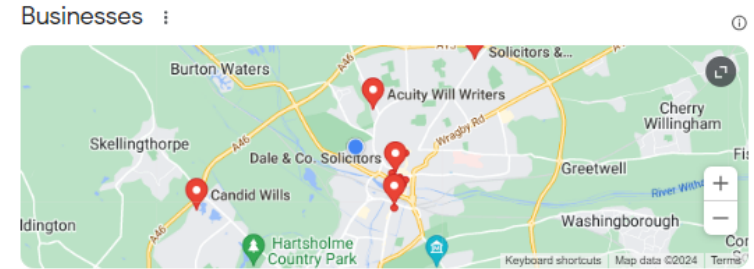
- Keep it modern, clean and simple.
- Make sure it is mobile optimised.
- Make it easy to navigate.
- Fill it with valuable, helpful content and insights that help the visitor to understand the problem they have and possible solutions.
- Give the visitor multiple ways to get in touch. Email, Phone, Web Chat, Contact Us and Social Media DM's
- Create a **conversion offer** – i.e a Guide To Writing A Will or a Will Review Tool?
- Set up a blog (more on this later)



#2 - Google My Business

Take the time to set up your local Google My Business profile. GMB traffic and searches are up by 40% in the past 6 months. Do not miss out on opportunities every day.

- Set up and optimise your profile for keywords.
- Add you phone number.
- Add your email address.
- Activate GMB chat.
- Link to your website.
- Add images and videos.
- Ask clients to leave you reviews – this is massive!
- Link to your other social media channels
- Post once a month on your profile.



Rating ▾ Hours ▾ Sort by ▾

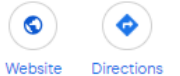
Bird & Co Solicitors LLP

4.8 ★★★★★ (90) - Law firm

35+ years in business · 352 High St · 01522 803050

Open · Closes 4:30 pm

Provides: Will writing



Acuity Will Writers

5.0 ★★★★★ (7) - Legal services

25+ years in business · 9 Westcliffe St · 01522 402637

Open · Closes 6 pm



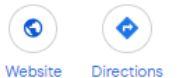
Dale & Co. Solicitors

4.5 ★★★★★ (29) - Lawyer

10+ years in business · 11 Beaumont Fee · 01522 513399

Open · Closes 5 pm

Provides: Will writing



More businesses →

Lincoln Wills

<https://www.lincolnwills.com>

Welcome To Lincoln Wills -

As the principal of Lincoln Wills, David Dexter can offer you a comprehensive range of cost effective legal solutions. David is a fully qualified chartered ...

ReviewSolicitors

<https://www.reviewsolicitors.co.uk>

Top 10 Wills, Trusts & Probate Solicitors in Lincoln

Top 10 Wills, Trusts & Probate Solicitors in Lincoln ; 1. Poole Alcock LLP. 1578 reviews ; 2. Pepperells Ltd. 1138 reviews ; 3. Sills & Betteridge LLP. 2748 ...



#3 – Set up Facebook Page

For private client work, Facebook will be the best social media platform for developing your presence, sharing content and connecting with the right audience.

- Set up a Facebook page, separate to your profile.
- Add you phone number.
- Add your email address.
- Set up FB Messenger.
- Link to your website.
- Add images.
- Ask clients to leave you reviews on FB.
- Post daily on your page, ,mix up interesting blog posts, with videos and document your journey and day.
- Set up Facebook Ads / Business Manager (More on this later)



#4 – Client Referrals

Set up a process for asking happy clients if they can refer you to friends or family.

- Offer an Amazon / M&S Voucher as a thank you.
- Set up an email to follow up a Will signing and thanking them.
- Follow up reviews with a thank you and a request.
- Take the details of witnesses at signings and develop a process to email them and follow them up.
- Ask for a testimonial from them, especially a short video which will be gold for you to share on your website and social media.



#5 – Partner Referrals

What organisations or businesses could refer work to you? Think about care homes, schools, companies looking after their staff – can you package your services differently?

- Set up a process for a partner referral.
- How could you reward a partner referral?
- Could you place an advert on their website?
- Do they have a partners page that they could link to you?
- Would they be willing to mention you in their newsletter?
- Would they be willing to email their staff about you?



#6 – Local Networking

There is nothing better than face to face networking and chatting to people for generating interest and leads. Plan to attend 2 -3 events per month. I like breakfast networking events.

- Remember that networking is sharing knowledge and being interesting to make people want to find out more.
- Prepare a “social pitch” that quickly answers “What do you do?” – 30 seconds that tells people who you are, what you do, who you do it for and how you do it. So even if it is not of interest to the person you are speaking to, they could introduce you to other people who it may be of interest to.
- Make it easy to connect on LinkedIn or social media.
- Take details of everyone you meet – Firstname, last name, email and mobile is a minimum to add to your database / CRM.
- Ask the networking organiser if you can run a “workshop” for them at one of the events.



#7 – Live Events

Prepare a “presentation for prospects” – a structured 60 minute presentation you can do as a live event or as a weekly online event / webinar.

These must be valuable and informative for the attendees, your focus is on:

- Introduce Yourself – Building trust and authority. Why they should listen to you?
- A = Pains - Three Challenges the audience could face.
- B = Prizes – The outcome that the audience desires the most.
- Obstacles – What is stopping the audience getting from A to B.
- Now discuss some solutions and alternatives.
- Then position yourself and make an offer of a free consultation.

The goal is to run this 3 – 4 times per month with a minimum of 10 attendees at each event.



#8 – Blogging & SEO

Blog posts are the most effective way to share valuable information, build thought-leadership, establish yourself as an expert to connect and engage with your audience.

But above all Google loves blog posts and ranking them for keyword phrases, so they are perfect for generating organic traffic and search engine optimisation (SEO)

Focus On:

- Creating a keyword list of long tail keywords on creating wills, lasting powers of attorney, trusts, probate services etc.
- Write 2 blog posts per month.
- Create a video out of each blog post – keep it simple, as if you were talking with a client. Embed into the blog post.
- Share you blog posts on social media i.e Facebook.
- Share you videos on YouTube, Facebook and GMB.
- Use AI and ChatGPT to give you ideas.
- Add Calls To Actions to every blog post i.e Book a free call.
- Share a relevant guide or download to convert a reader into a lead.



#9 Online Directories

Make sure you register your business and website with every online directory you can find.

I have put together a list of the Top 30 Directories with links to each of them. Take the time to register with each for a free listing.

These directories are searched thousands of times per day and will be a good source of traffic for you to your website.

TIP: They also allow a link back to your website and some have good SEO benefits for your website too.

NOTE: I will upload the PDF to the new members area and email it out to everyone who registered for this quarterly update.

Register at <https://members.btwc.co.uk>

Top Free Verified List - 30 UK Business Directories

Make sure you register your business details and website with each of these 30 directories for back links and traffic.

UK Directory	Domain Authority
Apple Business Connect	100
LinkedIn Company Page	99
Facebook Business Page	96
Google Business Profile*	94
Central Index	94
Bing Places	93
Foursquare	93
Yell	72
Pissed Consumer	71
Yelp	70
AILOQ	69
Kompass	66
Brownbook	61
Storeboard	61
Houzz	60
Lacartes	59
Infobel	59
Cylex Local Search	57
FreeIndex	56
The Best of UK	55
Cybo	55
Scoot.co.uk	53
ShowMeLocal	53
Nextdoor	52
Europages UK	50
iBegin	49
Thomson Local	49
Hotfrog	48
WhoDoYou	46
FindTheNeedle	44

*Your Google My Business Profile can be a great source of traffic as it appears on Google Maps and when optimised it will appear in search too.



#10 Paid Ads

I saved the best until last, as in my mind the most effective lead generation tactic I have used over the years is running Facebook and Google Paid Ads for clients and my own businesses.

When set up correctly Paid Ads are:

- **Profitable** – When you optimise them correctly they will always show a positive Return on Investment.
- **Scalable** – For more leads you simply increase your budget.
- **Highly Targeted** – The nature of paid ads means they will only be shown to the audience that you specify. Ideal for geo-targeting of specific areas.

If you want predictable lead generation and growth, I encourage you to add paid ads to the mix. I would recommend starting with Facebook Ads and then adding Google adds later.



BONUS - Using CRM & Email Marketing

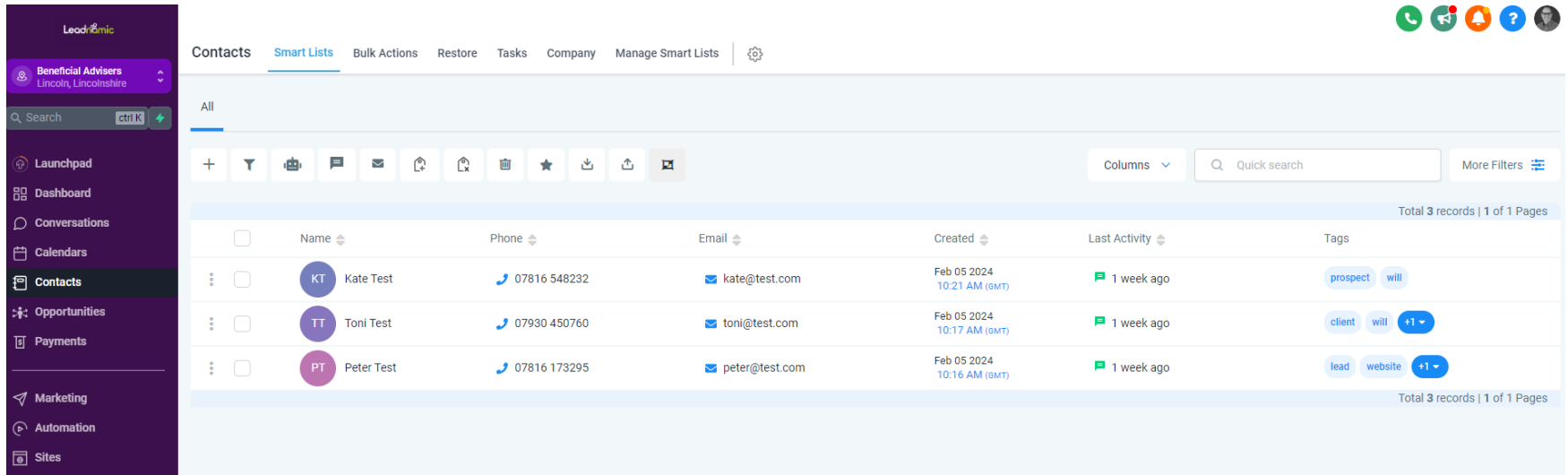
The secret to effective lead generation is in collecting client data, storing that data and engaging regularly with those people.

A modern piece of Customer Relationship Management (CRM) software is designed to do just that!

It allows you to segment your audience into prospects, leads and clients. But also by service and product, date you saw them last, engagement with your website and multiple other ways.

Then you can use automation and workflows to follow them up and generate new opportunities for you.

Email marketing is the most effective way to engage your clients, show you care and share insights and valuable information with them.



The screenshot displays a CRM interface for 'Lead4me'. The left sidebar contains navigation options: Launchpad, Dashboard, Conversations, Calendars, Contacts (highlighted), Opportunities, Payments, Marketing, Automation, and Sites. The main area shows the 'Contacts' section with a search bar containing 'ctrl.K'. Below the search bar is a toolbar with various icons for actions like adding, filtering, and deleting. A table lists three contacts:

	Name	Phone	Email	Created	Last Activity	Tags
<input type="checkbox"/>	KT Kate Test	07816 548232	kate@test.com	Feb 05 2024 10:21 AM (GMT)	1 week ago	prospect will
<input type="checkbox"/>	TT Toni Test	07930 450760	toni@test.com	Feb 05 2024 10:17 AM (GMT)	1 week ago	client will +1
<input type="checkbox"/>	PT Peter Test	07816 173295	peter@test.com	Feb 05 2024 10:16 AM (GMT)	1 week ago	lead website +1

At the bottom right of the table, it indicates 'Total 3 records | 1 of 1 Pages'. The top right corner of the interface features several utility icons: a green WhatsApp icon, a red Telegram icon, an orange notification bell, a blue question mark, and a grey profile icon.



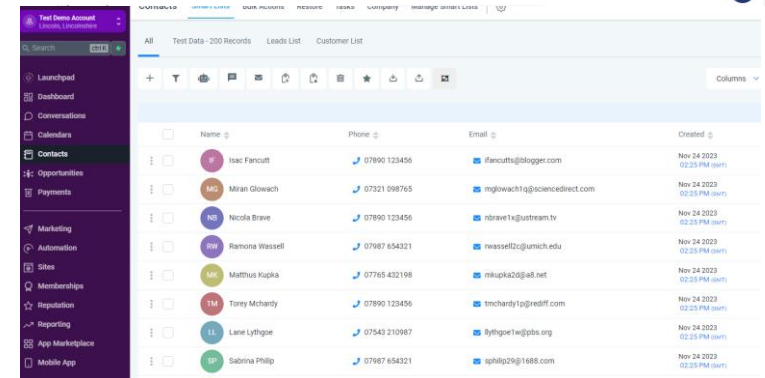
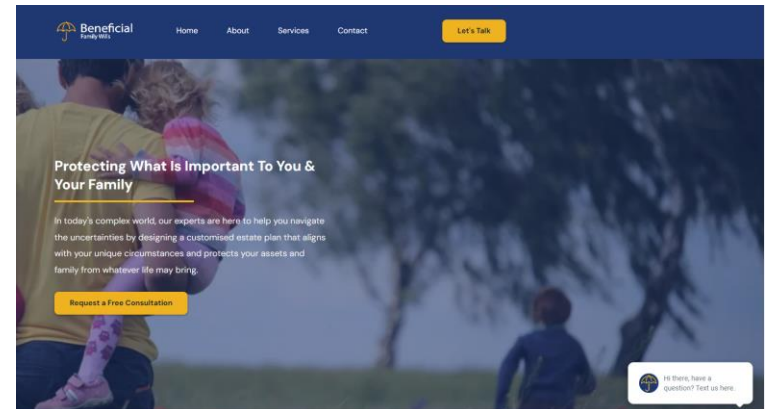
Coming Soon - New BTWC CRM, Marketing & Website Packages

At BTWC our goal is always to give you the tools and support to help you grow your business. We have put together two packages, one for advisers who want to operate under the BTWC brand and one for advisers who want to operate under their own brand.

I have designed these to be lead generation focused and give you everything you need, out of the box for a single monthly fee.

- Full CRM Software suite.
- Pre-built 12 Page Website
- Website Web Chat
- Full Blog
- Email Marketing Tools
- Workflow and Automation
- Full Google My Business Integration including chat.
- Facebook Page Integration – Including Messnger.
- Social Media Marketing Tools


If you would like a demo – get in touch with me on richard.mawer@btwc.co.uk



Coming Soon – New Members Area & Group

Aiming to have live by the end of February and will send out a registration link in the February Newsletter next week.

Community Groups



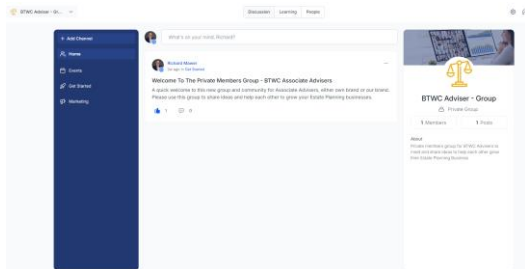
BTWC Adviser - Group

Members: 1

Owner: Richard Mawer

Status: Active

[Login](#)



BTWC Adviser - Group

What's up your neck, Richard?

Welcome To The Probate Members Group - BTWC Associate Advisers

A group created by this user group and managed by the Associate Advisers, who can stand in for BTWC. Please use this group to share ideas and help each other to grow your Estate Planning businesses.

BTWC Adviser - Group

1 Members 1 Posts

Memberships Courses **New** Communities **New** Certificates **New**










Your Products

Library Sorting Manage Comments

Search Products

9 Products

Sort: New

 <p>Probate Resources</p> <p>BTWC - Probate Resources</p> <p>0 Member</p>	 <p>LPA Resources</p> <p>BTWC - Trust Resources</p> <p>0 Member</p>	 <p>LPA Resources</p> <p>BTWC - LPA Resources</p> <p>0 Member</p>
 <p>Will Resources</p> <p>BTWC - Will Resources</p> <p>0 Member</p>	 <p>Video Training</p> <p>BTWC - Video Training</p> <p>0 Member</p>	 <p>Quarterly Updates</p> <p>BTWC Quarterly Updates</p> <p>0 Member</p>
 <p>Marketing Resources</p> <p>Marketing Resources</p>	 <p>Associate Adviser Training</p> <p>Associate Adviser Training</p>	 <p>Adviser Resources</p> <p>Adviser Resources</p>



Thanks for Listening – Any Questions?

Feel free to contact me on:

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