**Qualified Prospecting Campaign for Junior Financial Advisor**

**Target Audience**

High-net-worth individuals and business owners met at networking events

**Campaign Duration**

8 weeks

**Campaign Sequence**

**Week 1: Initial Follow-up**

**Day 1-2: Networking Event Follow-up Email**

* Use the provided script, personalizing it for each prospect
* Include a call-to-action to schedule a brief introductory call

**Week 2: First Value-Add**

**Day 8-10: Email Bling - Exclusive Financial Guide**

* Subject: "Exclusive Guide: 5 Key Strategies for Financial Success"
* Content: Offer a downloadable PDF guide on financial planning basics
* CTA: Download the guide and schedule a call to discuss personalized strategies

**Week 3: Gentle Reminder**

**Day 15-17: Follow-up Email**

* Subject: "Did you find our financial guide helpful?"
* Content: Ask if they've had a chance to review the guide and if they have any questions
* CTA: Offer a 15-minute call to address any specific concerns

**Week 4: Physical Touch Point**

**Day 22-24: Mail Bling - Branded Notebook and Pen**

* Send a high-quality notebook and pen with the firm's logo
* Include a handwritten note expressing appreciation for the connection and offering assistance

**Week 5: Digital Engagement**

**Day 29-31: Email Bling - Exclusive Webinar Invitation**

* Subject: "You're Invited: Exclusive Webinar on [Relevant Financial Topic]"
* Content: Invite them to a webinar hosted by the senior advisor, emphasizing exclusivity
* CTA: Register for the webinar and submit any questions in advance

**Week 6: Follow-up and Personalization**

**Day 36-38: Personalized Email**

* Subject: "Your Thoughts on Our Recent Webinar?"
* Content: Ask for feedback on the webinar and offer to address any specific questions
* CTA: Schedule a personalized financial review session

**Week 7: Final Value-Add**

**Day 43-45: Email Bling - Customized Financial Assessment Tool**

* Subject: "Your Personalized Financial Health Check"
* Content: Offer access to an online tool for assessing their current financial situation
* CTA: Complete the assessment and schedule a call to review the results

**Week 8: Final Outreach**

**Day 50-52: Phone Call and Email**

* Make a personal phone call to check in and offer assistance
* If no answer, leave a voicemail and follow up with an email
* Content: Express continued interest in helping them achieve their financial goals
* CTA: Offer a complimentary, no-obligation financial review session

**Key Points for the Junior Advisor**

1. Personalization: Always refer to specific details from your initial meeting or previous interactions.
2. Value-First Approach: Focus on providing valuable information and tools before asking for a commitment.
3. Consistent Branding: Ensure all digital and physical materials reflect the firm's professional image.
4. Respect Boundaries: If a prospect declines further contact, respect their wishes and cease the campaign.
5. Qualify Throughout: Use each interaction to further qualify the prospect's needs and potential fit.
6. Leverage Senior Advisor: When appropriate, mention the expertise and availability of the senior advisor to add credibility.

**Notes on DISC Behaviors**

* The junior advisor (High Influencer) should be mindful of their tendency to seek approval. Focus on qualifying prospects rather than just building rapport.
* When mentioning the senior advisor (High Dominant), emphasize their expertise and ability to drive results for clients.

Remember to adjust the timing and content based on prospect responses and engagement levels throughout the campaign.