



BUSINESS GROWTH & PRODUCTIVITY SERIES

GENERATING LEADS

EPISODE ONE

In *The Adviser's* new Business Growth and Productivity Series, partnered by Citi, top-performing brokers and brokerage groups unveil some of their top tips and successful business practices.

Episode one reveals the variety of lead generation tactics that have been utilised successfully by Australia's top-performing brokerages. Whilst credit policy, product and compliance knowledge are key, they are of little help in generating revenue if your business doesn't adopt a strategic approach to lead generation.

The industry experts expose which methods of lead generation have been most effective in improving their businesses.



AARON UPCROFT
MORE Group

ANTHONY ALABAKOV
My Mortgage Freedom

SAM AYLIFFE
Astute Financial

BEN WHITE
Astute Financial

SAM AYLIFFE AND BEN WHITE FROM ASTUTE FINANCIAL PINPOINT THE LEAD GENERATION TACTICS THAT HAVE YIELDED RESULTS FOR ASTUTE FINANCIAL



SAM AYLIFFE
Astute Financial



BEN WHITE
Astute Financial

Often ranked in *The Adviser's* Elite Business Writers and Top 25 Brokerages report, Ben and Sam run the Astute brokerage on Sydney's Northern Beaches.

With experience in banking and mortgage broking spanning over a decade, Sam Ayliffe regularly contributes to Sky Channel's *Your Money, Your Call*, and is recognised as an expert in the area of lending and investments. Ben White launched Astute Dee Why in 2001, pursuing his dream of managing a customer-focused business. Ben's hard work and perseverance have contributed to its reputation today as one of the fastest growing businesses on the Northern Beaches.

KEY TIPS INCLUDE:



SOCIAL NETWORKING USING FACEBOOK

- Regularly update your company's Facebook with relevant information
- Don't post negative stories or comments
- Consider topics that appeal to your clients, then plan to post stories on each chosen topic every few days – this will help engage your client following



CLIENT EMAIL MARKETING

- Send useful information and insights to your email distribution list



LOCAL COMMUNITY/SPORT SPONSORSHIP

- Sponsor school or community events – placing a local brand in front of the local community is very important for overall branding



ENGAGE WITH EXISTING CLIENTS

- Existing clients are crucial for lead generation – follow up with clients. By simply touching base, you may retain and increase more business or get referrals to family and friends



REFERRAL PARTNERS

- Referral partners can generate warm leads, so consider referral partners you are comfortable working with – accountants, builders, solicitors, or real estate agents. A referral is the best recommendation and as it's a warm lead, the success rate is generally higher

ANTHONY ALABAKOV, MY MORTGAGE FREEDOM, SUGGESTS A MIX OF LEAD GENERATING TACTICS IS IMPORTANT – BOTH ORGANIC AND PAID-FOR ADVERTISING CAN PROVE VERY EFFECTIVE IN ACHIEVING LARGE VOLUMES



ANTHONY ALABAKOV
My Mortgage Freedom

Anthony Alabakov, CEO of My Mortgage Freedom, developed the skill of understanding client needs at a young age in financial planning. In 2012, Anthony was awarded the top spot in *The Adviser's* Young Broker of the Year ranking.

Today, My Mortgage Freedom operates Australia-wide and is considered to be one of the country's leading home loan providers focused on prompt and reliable customer service.

KEY TIPS INCLUDE:



COMMUNICATING WITH EXISTING CLIENTS

- Engaging with existing clients can provide great organic lead generation opportunities, with repeat customer business and also word of mouth advertising leading to referrals or warm leads



PAID ADVERTISING

- Local newspapers used along with online, with preference for web banner



REFERRAL PARTNERS

- Don't be one-dimensional with lead generation – think outside the square!
- LinkedIn is a very good method for professional referrals through dealing with people across many industries with client bases who may have mortgages



COMMUNITY EVENTS

- Partner with local activities and charities – not only can this generate leads, it also gives back and provides local branding

