



ORCHARD FINANCIAL MARKETING

*Kiwi Adviser Network*

# 7 Figure Summit

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Jared Laidlaw, Cofounder

# Hi, I'm Jared

*Cofounder of Orchard Financial Marketing*

Orchard Street

**On the road**

*working out of a suitcase*



**Manhattan**

*2015, Wall St office*



**Brisbane**

*another couple of years*



**Back to NZ**

*Covid brought us home*



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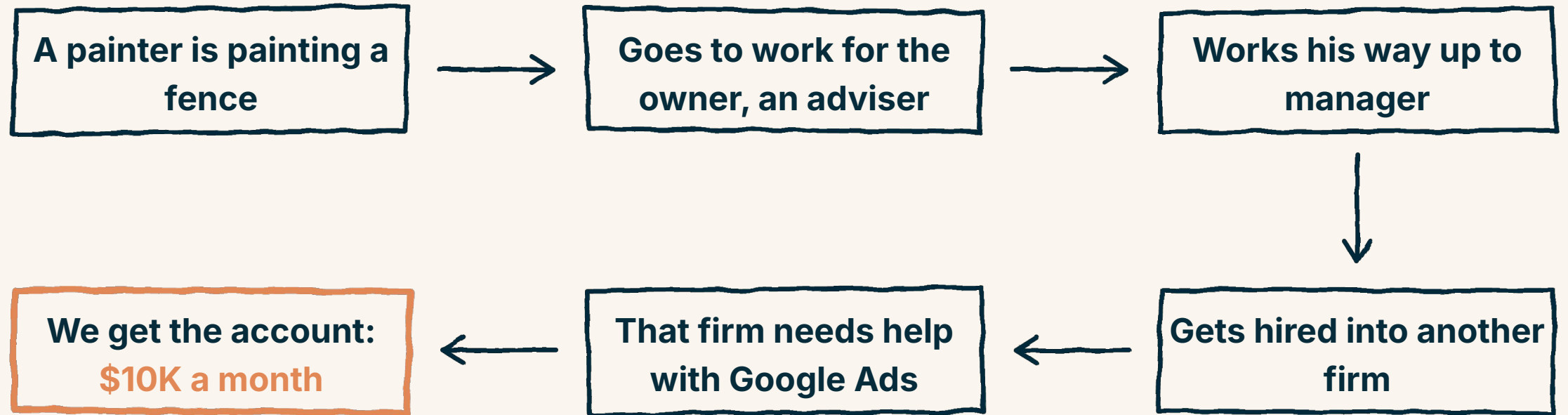
# How did I end up here?

*From employee 1 to a team of 10*

## Not far into that business, we picked up a **marquee client.**



# The story goes



OVER THE NEXT TWO AND A HALF YEARS

**\$10K**

*a month, mortgages only*



**\$230K+**

*a month, across KiwiSaver, insurance and mortgages*

**Eventually, that advice business was acquired**



*the next 40 minutes*

# Kept general-ish, on purpose.

Lessons from clients overseas, other industries, systems, processes, numbers and campaigns in this industry.

1–5 person team

20–30+ person team



Think about it in **your context.**



**Don't rely on photos.**  
**Grab the slides.**

*plus the practice recording, with every playbook in it*



*part one*

# How do you grow?

Before you pick the marketing...



# Marketing and sales go together.

*There's no point having the fastest racecar if the driver isn't any good.*



# Farmers and hunters

## Farmer

## Hunter

*you?*



The practitioners. Really good advisers, great with warm leads, referrals and people who are ready to close.

Hungry to sell. Fights to call every new lead, twice a day, every day, until they're told to go away.

*your business sits somewhere along this line*



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# So which one are you?

- 1 How fast do we call a new website enquiry?
- 2 How many times do we try before we give up?
- 3 Who on our team actually wants to make those calls?
- 4 When an opportunity walks in, who takes the reins?



# Match the marketing to the team

*mostly farmers?*

**Lean into channels that bring people who've half closed themselves.**

That's exactly what your team is good at.

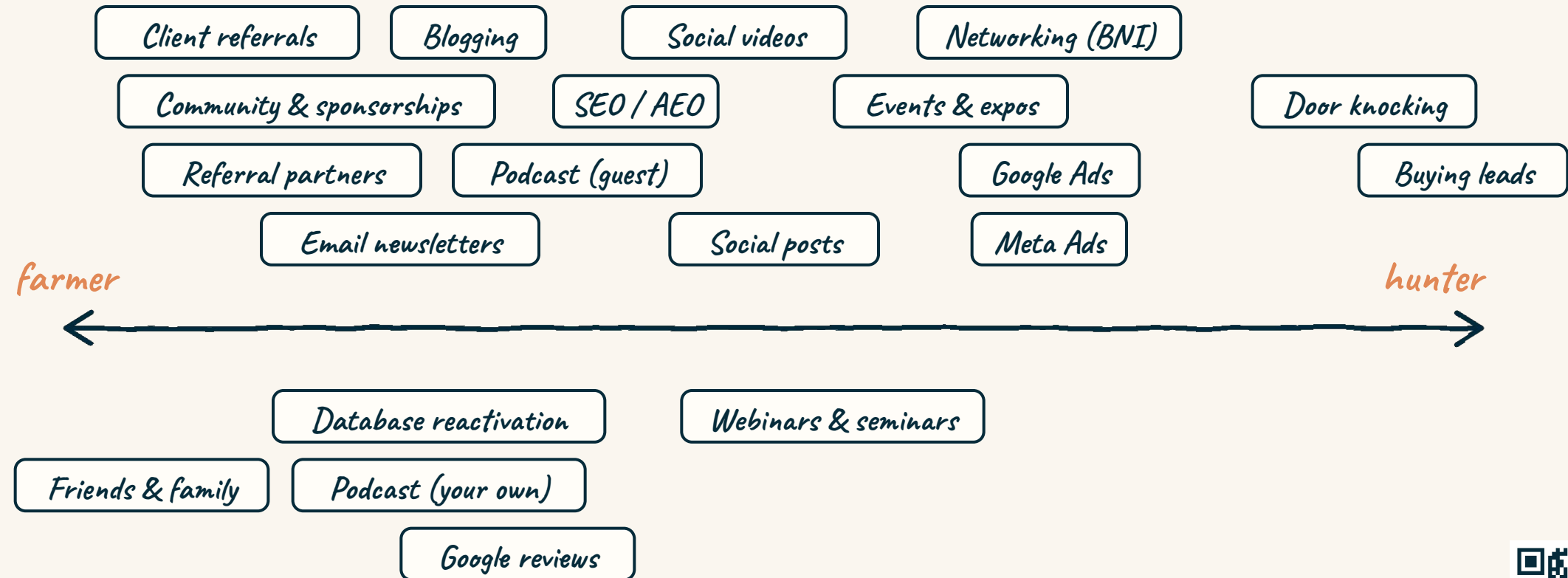
*mostly hunters?*

**Push harder on paid, on volume, on speed.**

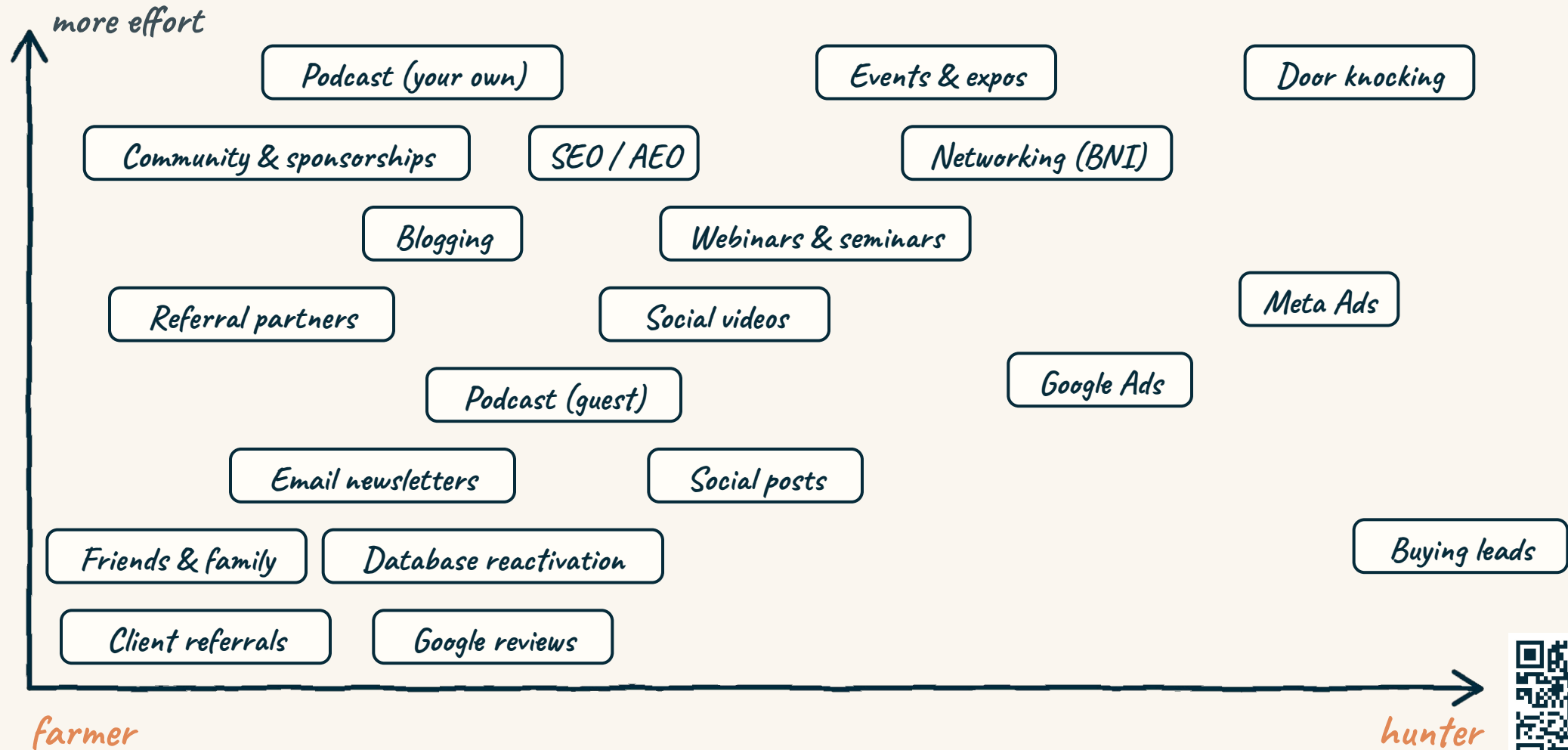
But plug the holes in the bucket first:  
clawbacks, bad reviews, clients switching to another adviser.



# Where I think the growth channels sit



# Now add effort



*You can do what you want, but be careful you haven't...*

**You've bought a Ferrari and given it to the wrong driver.**

**Your driver needs a tractor.**



# A good tractor can cost the same as a Ferrari.

Find the best fit for your team.



*a Ferrari*

**\$700,000 NZD**



*a good tractor*

**\$700,000 NZD**



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*a client in Sydney*

**Board wants  
aggressive growth**

**Sales training**

**The EOS  
framework**

**A marketing  
agency**

*...and a couple of long-serving advisers left, because it wasn't how they wanted to work.*

**Wanting to grow is easy. How you do it  
has to fit the whole business.**



*quick reminder*

**The slides are right  
here.**



*part two*

# How to grow

A framework that works whatever channel you choose.



# Most marketing fails because it's focused on the **traffic**.

*drive past the billboard      see the Facebook ad      meet at a networking event*

**...and we expect people to magically become a client because we did a thing.**



# Google's 7-11-4 rule

*write this down*

# 7

**hours of interaction  
with your brand**

# 11

**touchpoints or  
engagements**

# 4

**separate locations**

From Google's Zero Moment of Truth research: what people need before they choose who to buy from.



# Four locations is the easy one

*your website*

*Google Business Profile*

*Instagram and social*

*your blog*

*guides and PDFs*

*video guides and courses*

*a podcast, and it's on YouTube too*



*AXE stands for*

**Attract.  
Xchange.  
Engage.**



*yes, I cheated. AEE doesn't roll  
off the tongue.*



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**Attract.**  
Xchange.  
Engage.

**Get people from somewhere to  
your someplace.**

*Google Ads*

*Facebook Ads*

*podcasts*

*radio ads*

*competitions and giveaways*

*referral partners*

*offline events*

**It gets all the attention. And all the budget.**



We assume people who see our *thing* only need  
to see that

**one thing**

...and they're ready to buy.



**Attract.**  
**Xchange.**  
**Engage.**



Attract.  
**Xchange.**  
Engage.

**Turn someone who saw your  
marketing into a lead.**

*your website*

*a lead form*

*a download*

*a newsletter sign-up*

*text to get a freebie*

*book a call*



Attract.  
**Xchange.**  
Engage.

## Where does the ad **send them?**

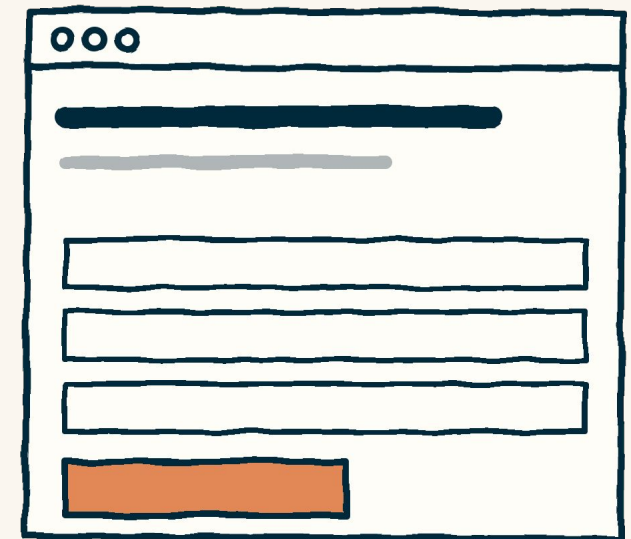
**Sponsored**

yourbusiness.co.nz > first-home

**First Home Buyer? Get  
Pre-Approved Fast**

Free 15-minute chat with a local adviser.

No cost to you.



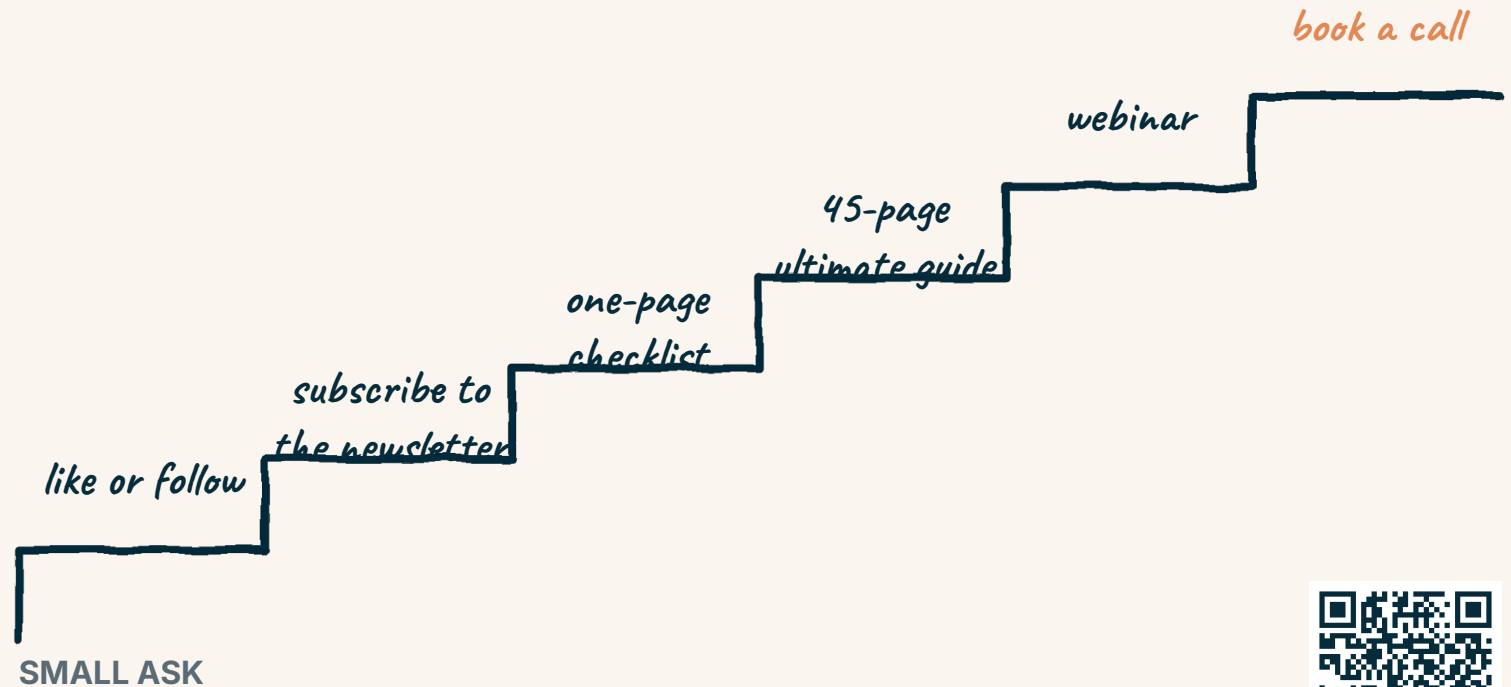
*a Google ad*

*where the Xchange happens*



Attract.  
Xchange.  
Engage.

Value is measured in their eyes, **not**  
**yours.**



**Attract.**  
**Xchange.**  
**Engage.**



Attract.  
Xchange.  
Engage.

*the final step*

**How you engage with a new  
lead, or someone on your  
database.**



*the minute a lead comes in  
the next few weeks*

*and into years*



Attract.  
Xchange.  
Engage.

*sorry to be the bearer of bad news*

**Call your leads.**

**Within minutes, ideally.**

**Within 4 hours, a must.**

*the longer you wait, the higher the chance you lose  
them*

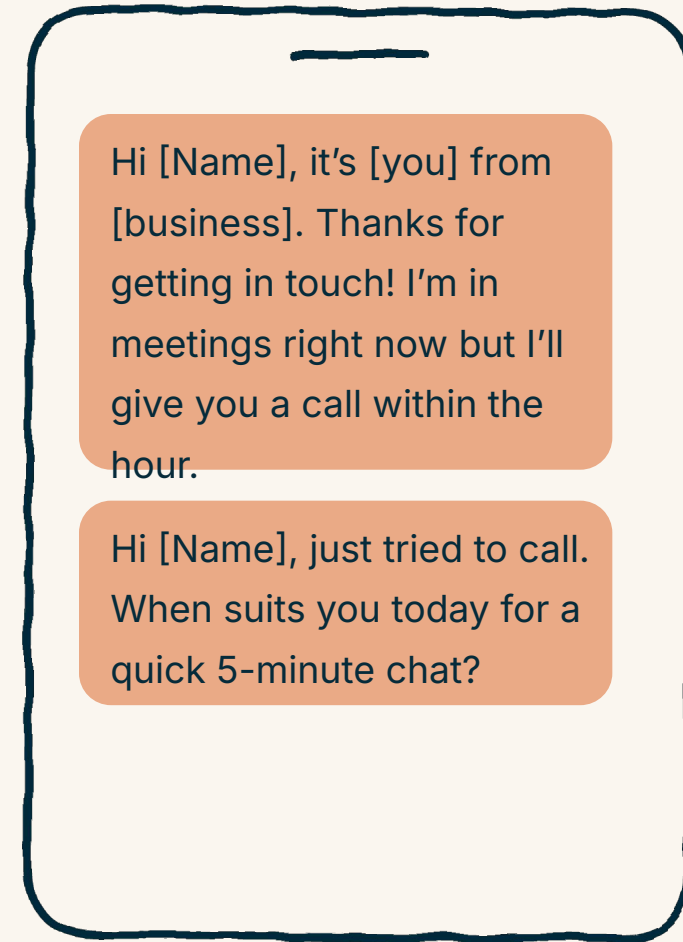


# Can't call yet? Text.

## *one client's baby step*

He started texting every lead the moment it came in. Sorry, I'm in meetings, I'll call you in an hour.

**A big difference in connection rates, straight away.**



*mortgage brokers, think about this*

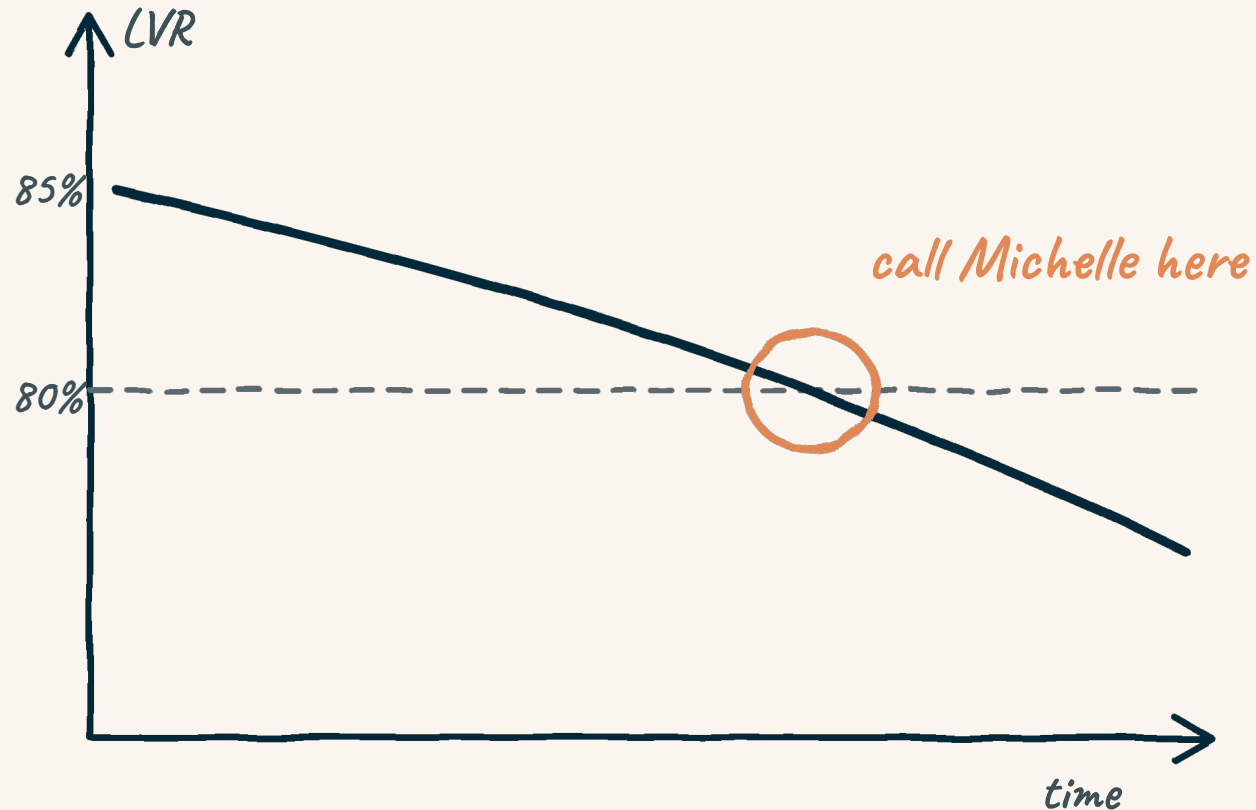
# How many first home buyers are on your email list right now?

They're a potential client until they buy, whether that's 3 months or 6 years away.

Stick around until the timing is right.



# Call when it's about them



NOT THIS

~~"Hey Michelle, I'm calling to do a  
refinance review."~~

THIS

**"Hey Michelle, it looks like your  
house price has gone up enough  
to get a good refinance deal.  
Want to talk about a review?"**



# So that's AXE



*part three*

# The playbooks

Plays to grow.



# Eight plays

1

Create content  
from your calls

2

Grow ads without  
spending more

3

Run Meta Ads that  
convert

4

Caption your  
videos

5

Know what works

6

Call your leads fast

7

Email your  
database

8

What people need  
to see

*I'll get through about three today. The practice recording covers all eight.*



*playbook 1*

# How to create content.

A trick section, because you already do.



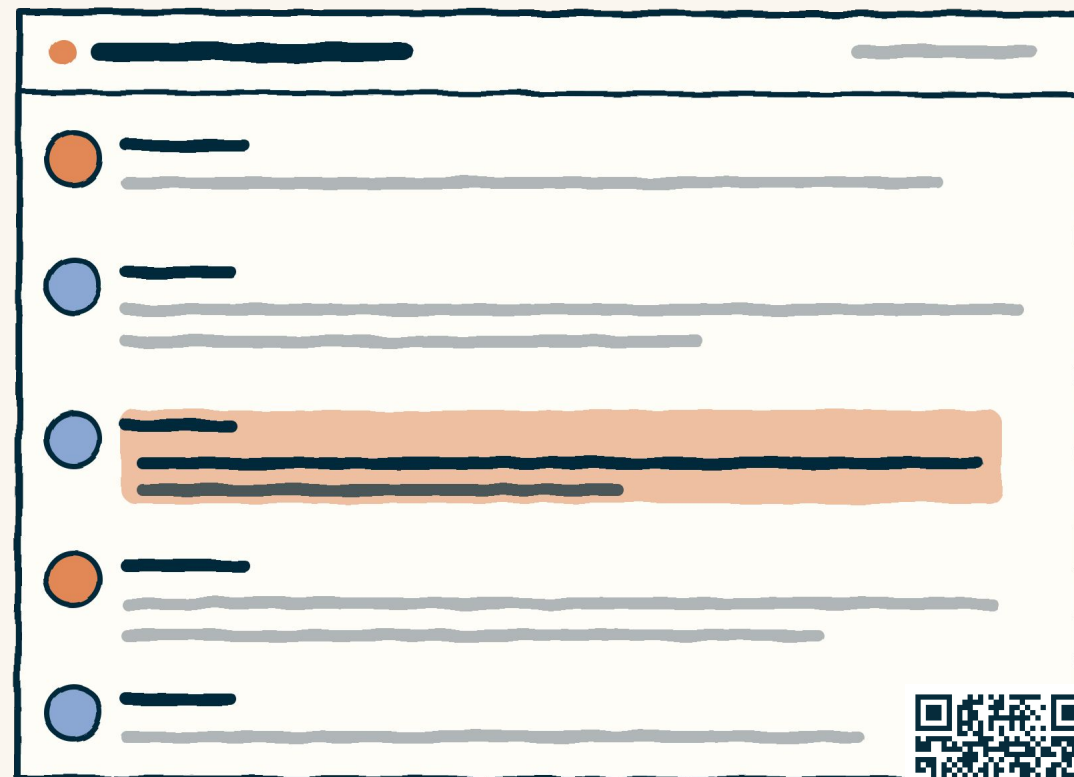
play 1

# How to create content: you already do

1

client call

*a conversation you've already  
had, and it's already  
transcribed*



# The prompt

PASTE YOUR CALL TRANSCRIPT, THEN

**"Pull all social media post ideas from this call, based on the questions this client asked and the situation they're in. Use the endless customers approach to finding these ideas and content. Then create 2-3 additional angles for each idea."**

*transcripts from*

Marloo

Otter

Zoom

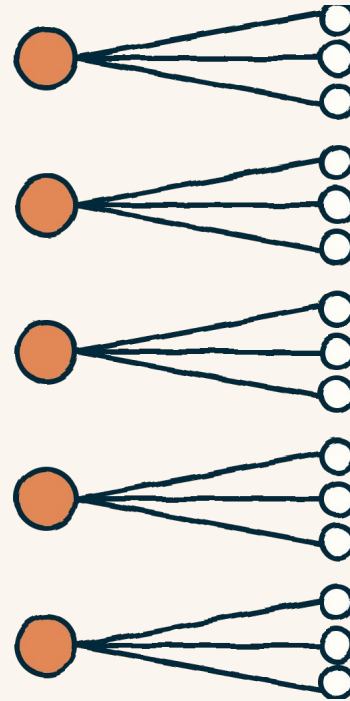
Trail

*bonus tip: if it's evergreen, always relevant, post it again in 90 days*



play 1

# You have your ideas



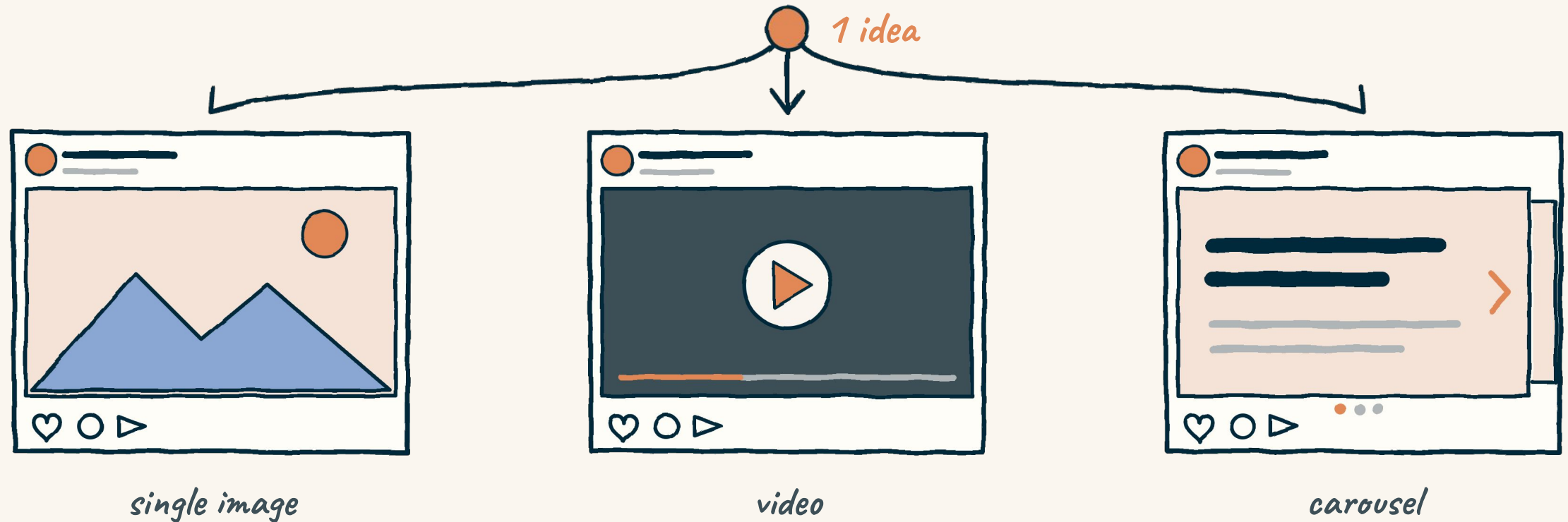
**20**  
post ideas

*5 seed ideas + 3 angles each*



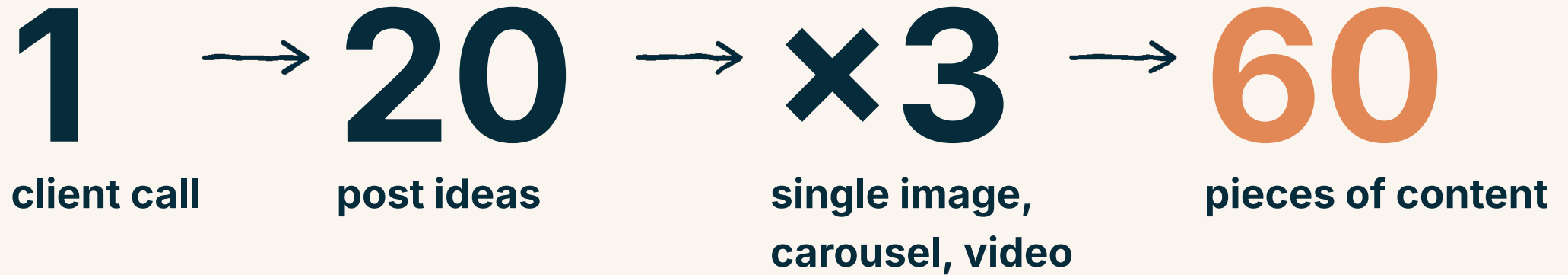
*play 1*

# One idea, three pieces of content



*play 1*

## How to create content: you already do



*...from one call. How many calls do you do a week?*



*a real example*

# One KiwiSaver conversation. Twenty post ideas.

Do it cost to work with adviser for Kiwisaver

Do I lose money when I switch Kiwisaver

I've done it I'll let it sit there and do what it does.

No knowledge of Kiwisaver

Never got around to it. Fixing my Kiwisaver



*a real example*

## 20 post ideas from one conversation

- 1 Does it actually cost anything to get KiwiSaver advice?
- 2 Is a "free" KiwiSaver review actually free? Here's the catch
- 3 What "letting it sit" could cost you by 65
- 4 Where to find the fees you're paying on your KiwiSaver
- 5 Do you lose money when you switch KiwiSaver?
- 6 Why "set and forget" can quietly hurt your KiwiSaver
- 7 What happens to your KiwiSaver while you're on parental leave?
- 8 5 signs your KiwiSaver needs fixing
- 9 The biggest KiwiSaver mistake we see women in their 30s and 40s make
- 10 Switching provider vs switching fund: what's the difference?
- 11 DIY vs using an adviser for your KiwiSaver
- 12 Conservative vs balanced vs growth: which fits you at 35? At 45?
- 13 Fixing your KiwiSaver now vs in 5 years
- 14 An honest review of the default fund you were probably put in
- 15 We reviewed a real KiwiSaver (with permission): here's what we found
- 16 An honest look at Sorted's Smart Investor tool (and what it can't tell you)
- 17 The best first step if you know nothing about KiwiSaver
- 18 The 3 most important things to check on your KiwiSaver statement
- 19 The easiest 10-minute KiwiSaver fix most people never do
- 20 The most-asked KiwiSaver questions from women in their 30s and 40s



*playbook 2*

# Grow with ads Without spending more



*play 2 · the 80/20 principle*

# Grow your ads without spending more

TEST 1



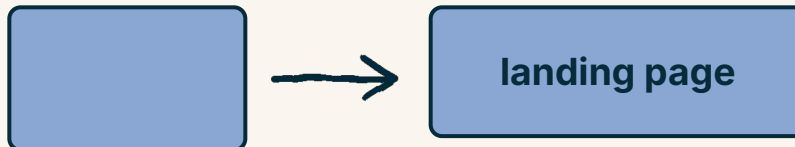
*red, yellow or blue? blue wins*

TEST 2



*navy, blue or baby blue? baby blue*

THEN MATCH

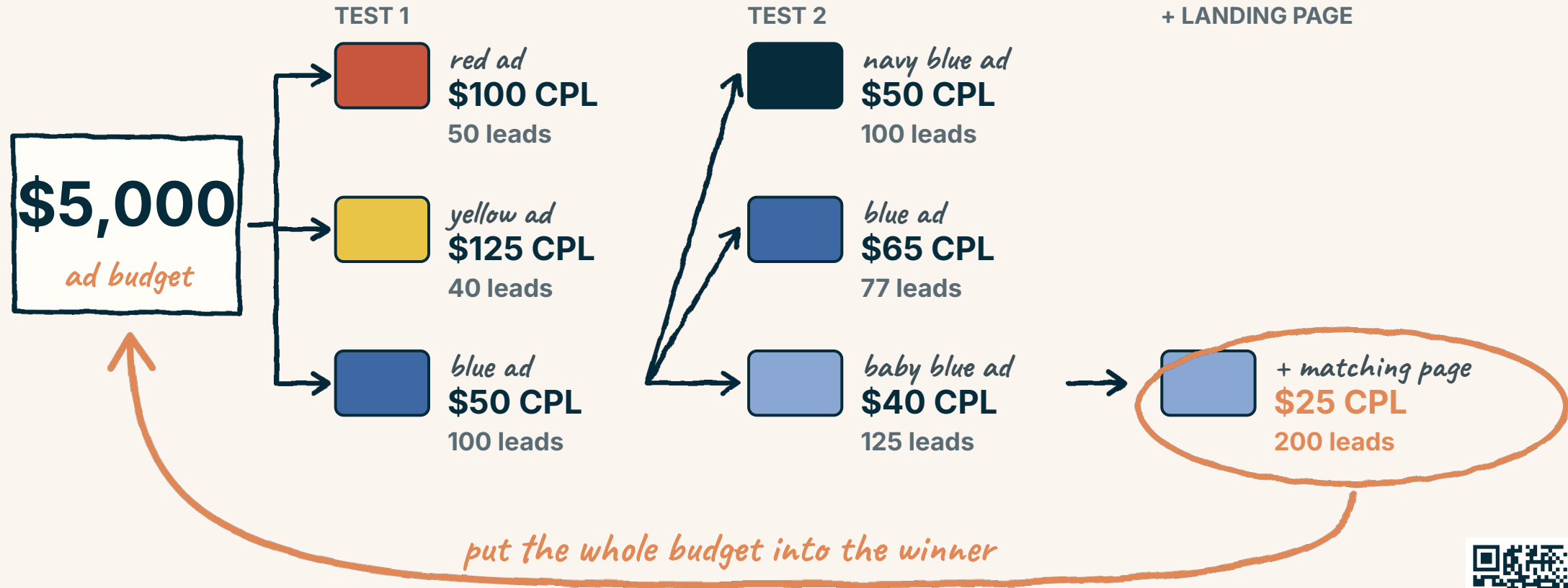


*baby blue ad to a baby blue page*



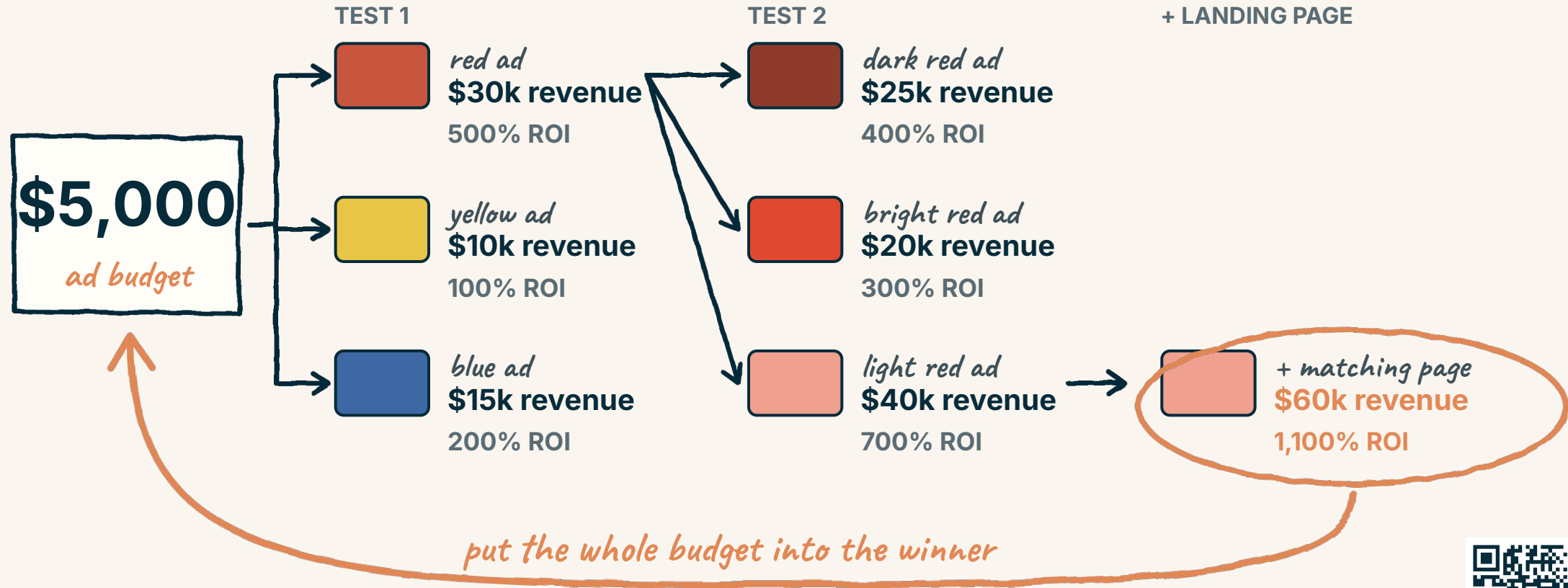
*play 2 · same budget, more leads*

# Better Cost Per Leads (CPL)



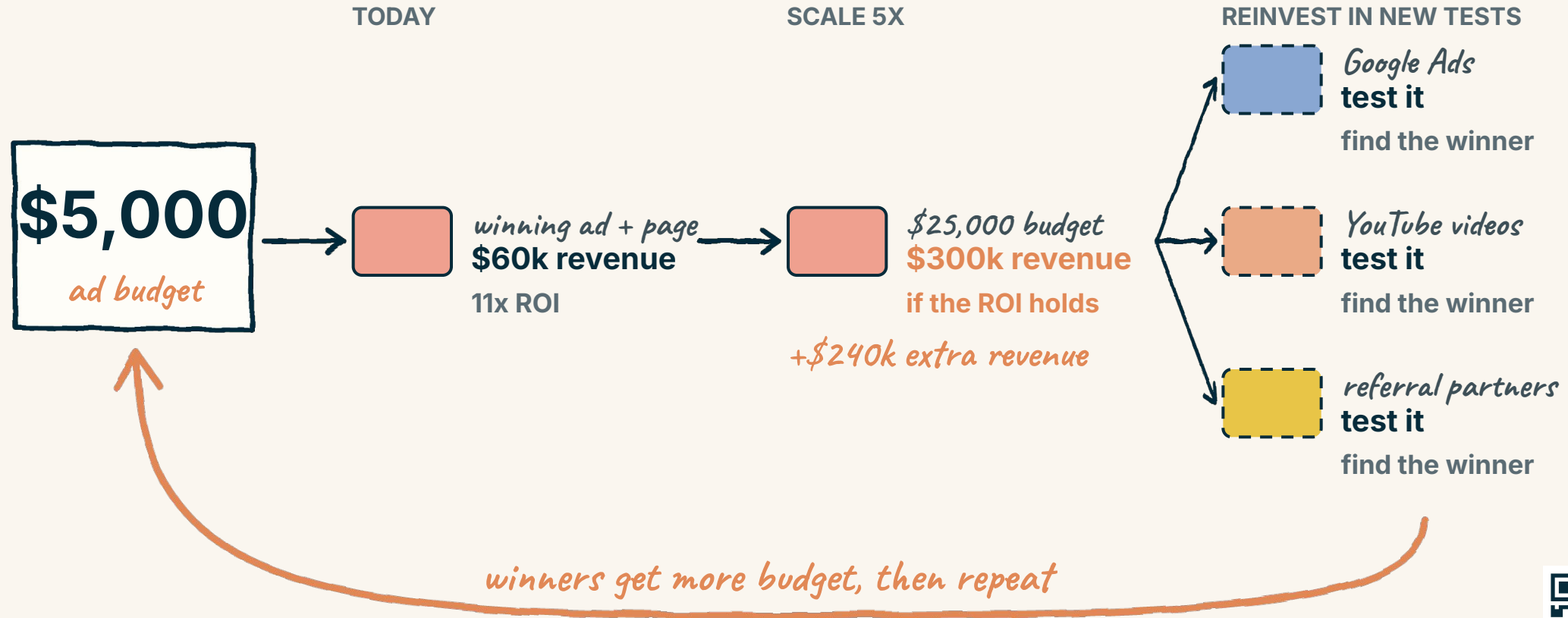
play 2 · track the return

# Turn \$5,000 into \$60,000



play 2 · scale what works

# Scale the winner, fund the next test



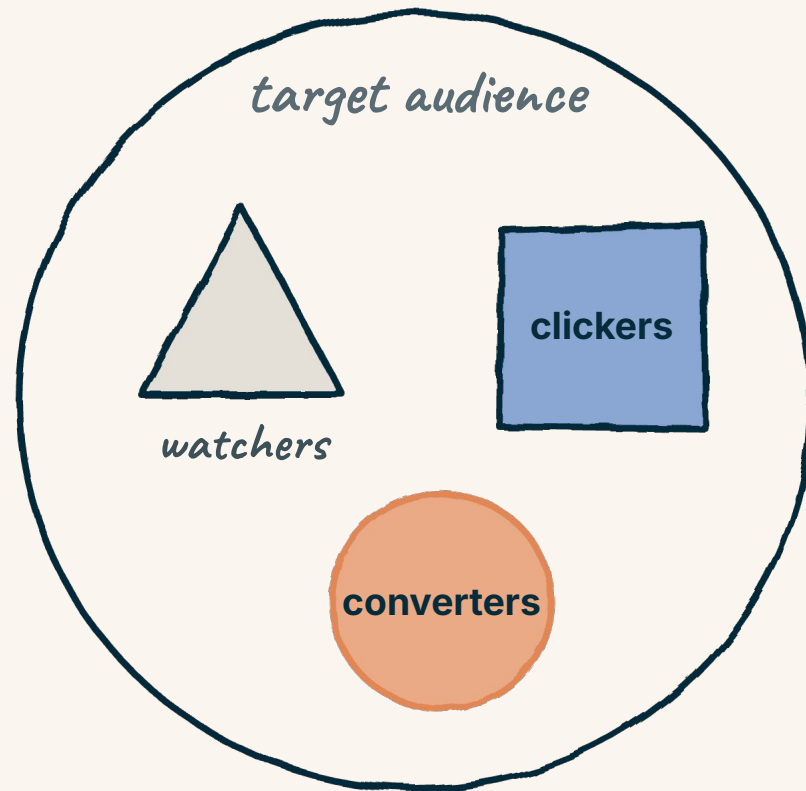
*playbook 3*

# Run Meta Ads that convert



play 3 · Meta Ads

# Run conversion campaigns



**Tell Meta to find the people who convert.**

Not Traffic

Not Video Views

Not Engagement



# What we prefer



- 3–4 ads that are genuinely different: scripts, angles, benefits, pains
- Talk to a specific person about things specific to them

- Says exactly what the ad says

- Hard to fill out, on purpose
- Conditional logic to boot out DQ leads
- Text verification
- Only fire the conversion for quality leads, so Meta goes and finds more



# The moment the form is submitted

1

**Send the lead a  
confirmation email**

2

**Send your team the  
lead**

3

**Call or text the lead**



*playbook 4*

# Put captions on your videos





*play 4 · captions on videos*

# 75-92%

**of social media videos are watched on mute.**

*add captions free in the Edits app, download it, then post anywhere*



*playbook 5*

# Know what works



*play 5 · how \$10K a month became \$230K+*

# Know what works

## Track what goes in

- Marketing spend and fees
- UTMs on every channel
- Hidden form fields and GTM
- All into your CRM, AdviceCRM or a spreadsheet



## Break it down

- Channel: Meta, Google...
- Campaign
- Targeting and keywords
- Region
- Product



## Review what comes out

- Who closed, who didn't
- Close rate (effort rate)
- ROI
- Can you scale the spend, or is it tapped out?

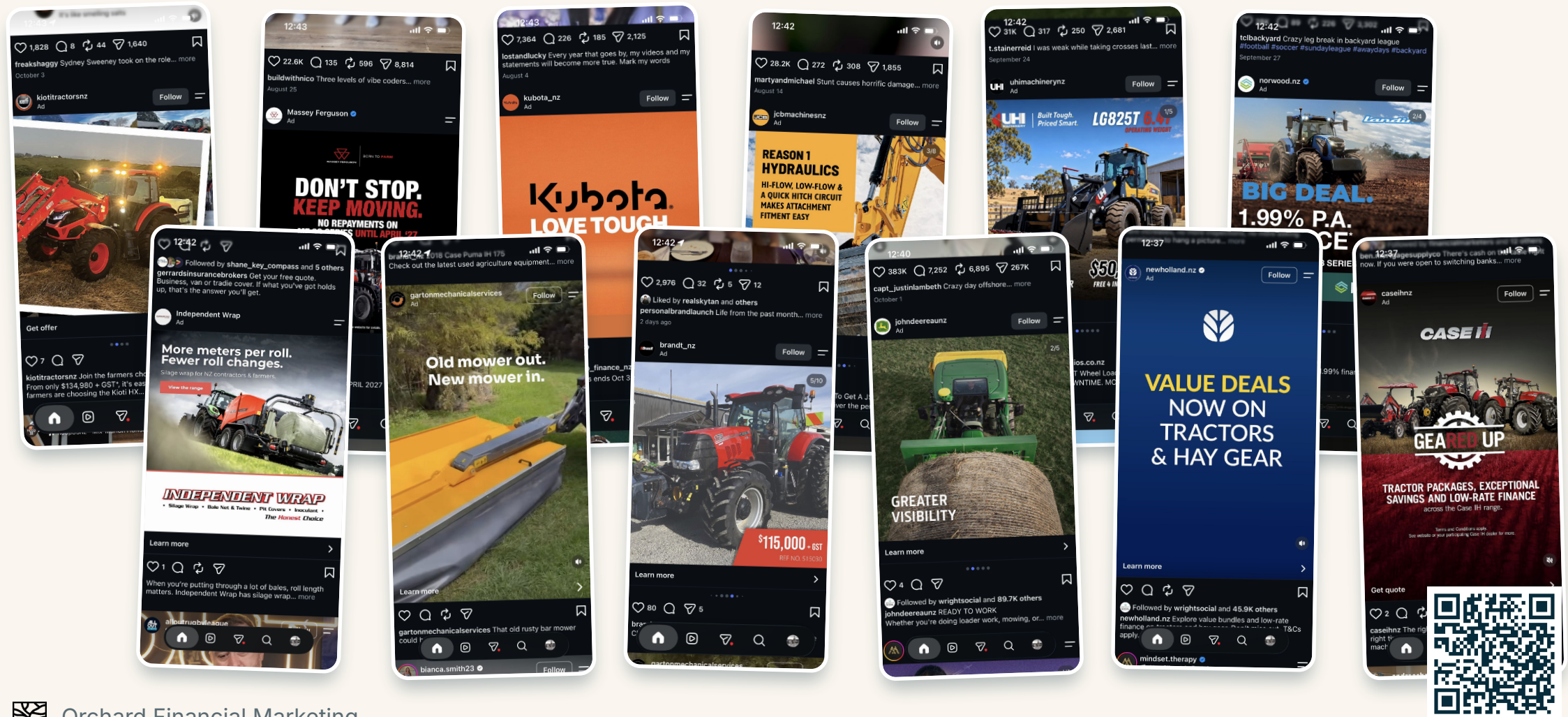


*playbook 6*

# Call your leads fast



# Call your leads, because the ads are coming...



*playbook 7*

# Email your database



*play 7 · the day after National's 5% Kāinga Ora announcement*

## Email your database

One email to a pretty average first home buyer list. Never really nurtured, all from Facebook Ads.

**312**

emails sent

**25%**

open rate

*higher than expected*

**0**

unsubscribes

**0**

spam reports



*playbook 8*

# What people need to see



play 8

# What people need to see first

- ✓ Reviews on a non-biased channel, like Google
- ✓ Awards (they do help)
- ✓ Your experience
- ✓ Testimonials from people just like them
- ✓ Your knowledge
- ✓ Your face, real pictures of you

*aim for 2–3 testimonials per type of client, then get more specific: single FHB, family FHB, older, younger...*



*part four*

# Homework

---

Takeaways to put to work in your business.



*homework, for those who want to grow*

# Map your own AXE

## Attract

- Write down every way you attract people now
- Score each one out of 10
- Which bring your best clients? Which bring the most needy?

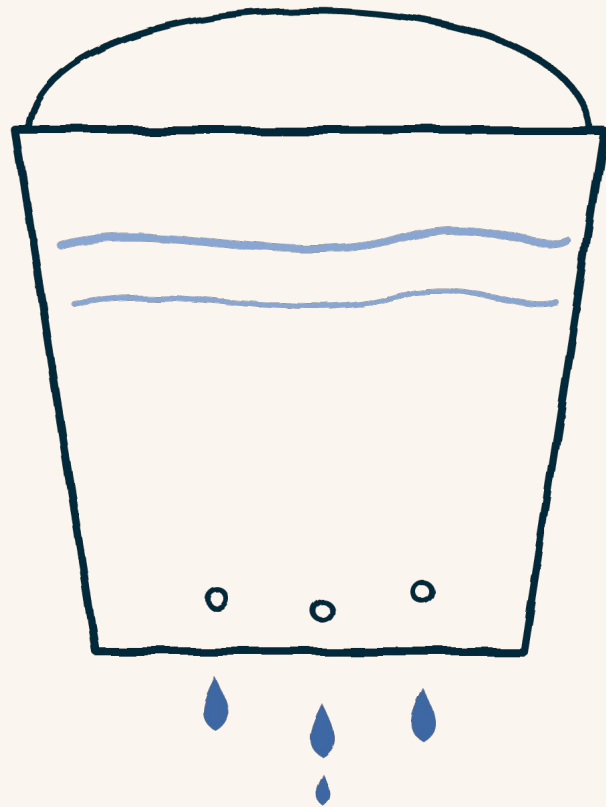
## Xchange

- For each one, where do people go?
- Where does the exchange happen?
- Are there steps? Do the steps make sense?

## Engage

- What happens next? And next?
- How do you get the Google review? The referral?
- The refinance in 3 years? The insurance or KiwiSaver?





**Growth isn't just how much  
water you pour into the  
bucket.**  
**It's how much you keep in it.**



# You don't need to go from \$10K to \$230K to grow.

*(it would definitely help!)*

Sitting down and working out what's happening now, and the potential you already have in the business, is where you'll often find the quickest and easiest growth.



*good luck for the rest of the year*

# Thank you.

**Questions?**



[orchardfinancialmarketing.com](https://orchardfinancialmarketing.com)



*slides and the full recording*

*no questions?*

## Questions to think about

- 1 How do I find and target the right type of clients?
- 2 What budget should I have?
- 3 How do I track what's working?

