



VERTICAL VISION
FINANCIAL MARKETING

PreSet Appointments: One-on-One Meetings with Fully Pre-Qualified Affluent Prospects

Our program is the ONLY lead generation program in the market that targets and pre-qualifies affluent prospects to meet with you in a one-on-one dinner or in office appointment.

In your neighborhood, there is a large segment of the population that will either not respond to a traditional event or are uncomfortable discussing certain matters in a group setting. Our appointment program takes the best of traditional event marketing with a much more personalized and target method of putting you in front of fully-qualified prospects that want to meet in a more business-friendly atmosphere.

PROGRAM HIGHLIGHTS

- Generates one-on-one appointments with prospects who won't respond to a traditional dinner event or direct mail solicitation
- The average 7,500 piece campaign generates 15 to 30 pre-qualified meetings
- Motivates affluent prospects to respond by reinforcing the difference between a dinner meeting and a group event
- Pre-qualifies all prospects before face-to-face meetings
- Allows you to determine the pre-qualifying questions
- Provides 24/7 live call center support of all inbound prospect calls
- Records all pre-qualification calls
- Boasts a 95% meeting attendance rate
- 60% prospect-to-client conversion rate
- Does not require PowerPoint, projectors, laptops or other presentation materials
- Is tested and proven effective for securing affluent prospects (\$250,000 - \$1,000,000+ in assets) in both large and small markets

PACKAGE INCLUDES

- Fully personalized invitation with bio card insert
- Appointment pre-screening & setting performed by professional call center
- Qualification survey provided and meetings set with only those responders who meet your qualification minimums and agree to meet with you
- Password protected website that enables you to view and listen to each and every one of your incoming calls

Plan Your Work, Work Your Plan.

The Marketing Team at Vertical Vision can help you develop a year-round prospecting plan. Whether you choose to stick solely to event marketing or a mix that includes direct mail, pre-set appointments, and client appreciation efforts - we have the products, services experience and customer service that will allow you to do what you do best - meet new prospects and build record numbers of new clients.

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