

Advisor “4M Funnel Rules”

1

Market
(the Who)

2

Message
(the What)

3

Mechanics
(the How)

4

Metrics
(the Math)



“A funnel is a piece of art, every little detail is critical for the end outcome and success. Most people treat funnel as pure mechanical and fails.

- Deepak Patel



Deepak Patel

Founder of Advisor Learn Platform (helping 80+ Financial Advisors & Insurance Agents)
Owner of \$6.5 Million Private Investment Firm

 **AdvisorLearn.com**

Advisor Funnel success rules

- **Start with simple** — Need to prove our message to market match.
- **LinkedIn Funnel** — Simple, low cost and fast funnel to get meetings and clients. Low scale.
- **Facebook Funnel** — More complex, high cost and slow funnel to get meetings and clients. Very high scale and can be your best client acquisition process for life.
- **4M Principle: Market, Message, Mechanics and Metrics** — You must have the right message to market (niche) match. You must have a right process and sequence to connect/followup. You must track your metrics to optimize and get ROI.
- **Tech** — You must get comfortable to work with technology and be open to pay small fee to get automation in place. Not doing this will not get your results
- **Follow step by step instructions** — I am providing you everything you need, you just have to do it step by step. Don't go out on your own to learn this stuff. Funnels are extremely complex and every one will make it look easy. You will burn money and time.



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