



NEW PLANNER PODCAST



Full Episode Transcript

With Your Host

Caleb Brown

Ep#197: Filling Your Marketing Funnel with Lauren Hong

Welcome to the *New Planner Podcast*, where it's all about helping you successfully enter the financial planning profession and accelerate your financial planning career.

This podcast will help you understand the profession, become familiar with the various career paths available to you, and avoid the mistakes that limit your success.

Join your host, Caleb Brown, to explore the human side of creating a successful planning career through interviews, personal experience, and insights from the trenches.

Let's get started.

Caleb Brown: Welcome to the 197th episode of the New Planner Podcast. This is Caleb Brown, your host. My guest today is Lauren Hong, who is the president of Out & About Communications, a marketing firm specializing in financial services.

Lauren joins the show today to share how she got started in helping financial services firms with their marketing, what trends she is seeing right now as it pertains to AI and video, what the best managed firms do to attract clients and top talent, and how to develop and promote a brand. She goes on to discuss the biggest mistakes she sees with advisor marketing. She also provides some stats on frequency and cost for website overhauls, and how new planners can identify a top firm to work for.

Stay tuned to the end where she provides specific ideas for new planners trying to fill their marketing funnel with qualified prospects, how to gain clarity early on in your career, and a few other tips for new planners. I hope you enjoy my interview with Lauren Hong.

Hey Lauren, welcome to the New Planner Podcast.

Lauren Hong: Yeah. Thank you for having me. I'm glad to be here today.

Caleb Brown: Thanks so much for joining us for a few minutes. I mean, we've connected in the past and I wanted to have you on just to talk about what you're doing and what you're seeing out there. I mean, with the marketing for the communications firm.

Ep#197: Filling Your Marketing Funnel with Lauren Hong

So maybe if you would just start there on how you got started in serving financial advisors, what you guys do, and then we can talk a little bit about what you're saying.

Lauren Hong: Oh my goodness. Okay. Well, I don't want to take you back too far, so to make a long story less long here. My background's in graphic design, and we've been in business for about a dozen years.

We got going. We had our first REA client and we crushed it. And we just did a really good job. And I, I realized at the time, I didn't know it going into the account, but I realized there's a lot of opportunity here to really—it's challenging one. But it's an opportunity to really help these firms stand out in the market.

And things just kind of caught fire. And so you fast forward to today, and we have hired with specifically for folks that are passionate about this space. We put our training around this space. And we really, right now, actively about 70, 75 percent of our active client base are RAA firm. So we just know this space really well, and we exclusively work in financial services.

So it's our jam. And that's kind of a high level where we are and and how we got to do what we're doing today.

Caleb Brown: Thanks for sharing that. So it sounds like you don't have to be in RAA. I mean, if you're in the insurance channel or another channel, you guys still work with that group as well.

Lauren Hong: As long as it's in financial services, payroll, banking, all that good stuff. So.

Caleb Brown: That's great. All right. And then maybe just like the services. I think I said marketing, but I think it's more than that. So why don't you help correct me there?

Lauren Hong: Yeah, we mostly act as an outsourced marketing agency.

So, just like high level when you think of what does that mean and deliverables, we have a strategy arm that's really wrapping our arms around the full strategy and helping you navigate that from the planning to the data review and analytics. We have a management team, and then we've got our team of implementation specialists and they're the things that you think of when you think, "Oh, marketing."

Ep#197: Filling Your Marketing Funnel with Lauren Hong

Like website redesigns, social media, videography, website development, lots of copywriting, lots of graphic design, we do these kinds of deliverables. It's wide and varied, but it's really designed so that you've got specialists that are doing the work.

Caleb Brown: And what trends are you seeing right now in the—I mean, is everybody going on video or is that kind of old school now and you've moved on to something else?

Lauren Hong: Video's been a thing for a little while now, which is great. AI, of course, is all the rage, it's the hot topic right now. For better or worse. So we have seen a lot of questions around that. But those are some of the things without getting into too many specifics.

Caleb Brown: Gotcha. So you've been working with firms for, I think you said a dozen years.

Okay. So you've seen quite a few financial planning firms. I mean, maybe just walk it like, what are you seeing? When firms are looking to hire, or maybe if you can recall any firms that you thought really had it together. When they were looking to hire to help maybe the job seekers and the candidates and the new planners that might be listening, how do I identify some of these firms?

Lauren Hong: Yeah, such a good question. So it's funny because we've seen a lot of firms at various stages of growth. I'm talking like firms with a few employees up to probably our largest is about 250 employee count. And at each stage of growth as you're hitting those AUM markers—sometimes that's a key indicator, right?

There's a lot of challenges and different challenges for firms along the way. So if you are in a seat and you're going, okay, you've got one life to live. Where are you going to spend your time and how are you going to climb this career ladder? There is some stuff that we've seen that different firms are doing to be able to help with recruiting.

So, if you're looking for red flags, I'll kind of give you a punch list of things that we advise firms to do if they're looking to hire. So the first one might sound like a no-brainer, but it doesn't always happen, which is look on their website. Is it updated? Do they actually have a careers page?

Can they get a vibe for their culture? All those sorts of things. Are they active on LinkedIn? That's another one. That's such a big platform. we often advise firms to at a

Ep#197: Filling Your Marketing Funnel with Lauren Hong

minimum, just keep a drip of your culture, updates, like if you have fun events that you're going to, if you're going to industry conferences. Holidays. Things like that. Highlighting the employees.

You can get a feel for culture, right? To kind of get a feel for that. Other things that we recommend for firms, or really for individuals that are looking is, check out, are they a best place to work? Have they won awards? What sort of outside credibility?

Are they posted in the media? And all these little kind of cues help to give you an indicator of, "Is this the place I want to be?" Are they investing in their team and are they externally positioning that as well? That this is kind of the energy in the place that I feel like I could find a home there and be nurtured by that community.

Caleb Brown: Thanks for sharing those. I know when I go to websites and I see at the bottom like content or copyright, 2020 or whatever. I'm like, "Oh no." Or 2018, it's like, this is not good. These people are viewing this as a static online brochure, which is—

Lauren Hong: Yeah. totally.

Caleb Brown: I mean, that's not the way to go, right? You're the expert here.

Lauren Hong: I mean, we've got firms that are like very heavy on recruiting, and sometimes they'll have a page that's just dedicated, like they'll have a path on the homepage that says, okay, is this for a prospective client or is this for a prospective advisor to join the firm?

Yeah, these are all things. Even go to employees' LinkedIn pages. Are they promoting? Do they show up? And are they honoring the brand as well? These are all little cues that help to like get a feel for, "Is this the place I'd want to work for?" and how are they leaning into all that?

Caleb Brown: Got it. And let's just say maybe a firm has it. I mean, I just knocked them, but they haven't updated their website. And should job seekers rule that firm out?

Lauren Hong: Not necessarily. I think it's something to be aware of, though. There might, sometimes there's cultural shifts that are happening internally or change of leadership.

Ep#197: Filling Your Marketing Funnel with Lauren Hong

There might be internal things that are taking precedent over those changes. So I think at the core of it, you really want to be able to ideally talk with someone, especially if you're deep in that interview process and you're entertaining, is this the right fit for me? And making sure that you're kind of getting that right energy for if it's the right fit or not.

Caleb Brown: I shared a couple of examples in the book that I wrote last year for job seekers, but maybe that's a value proposition when you're like, "Hey, your website needs to be updated and your LinkedIn profiles aren't like, I can come in and do that for you."

You know what I mean? Maybe that's a way to get a foot in the door on an internship or a residency, or maybe even a fully paid associate planner role. So just trying to encourage them to get a little creative. So it's not like you said, black and white, yes or no, but something to pay attention to.

What are some of the other—all these firms that you've seen, and I know you've seen a lot, like who has it together? What are they doing?

Lauren Hong: Oh my goodness. Well, the firms that have it together, I think at the core, they've fought through high-level business strategy and how they want to be positioned in the marketplace.

So, they're gonna be able to—if you're being interviewed, you also usually have an opportunity to ask questions too, so right, you're interviewing them, and if you're asking questions like, "Can you tell me more about your values?" Or, "Where does the firm want to go?" "What do the next few years look like this?" Or "What kind of growth opportunities would I have internally inside of this organization?"

These are all opportunities that are gonna give you indicators on how they respond if they've got it together and they've thought through that bigger picture versus kind of going through the motions.

So, if it's together, usually it starts to show up externally, and then the question of "Should I rule out a company that has an update to their website?" I'd say no, maybe that there's some internal shaking out, right? And usually that internal shaking out externally is usually reflected in things like website updates and other assets or other channels like LinkedIn.

Ep#197: Filling Your Marketing Funnel with Lauren Hong

So being able to go those routes really helps you to be able to say, “Okay, do they have it together? Here's ways that I can ask that. Here's ways I can look at it externally on these different platforms, like LinkedIn, like your website.” And then even a job description. Are you reading it? And it sounds like it was like a dry, kind of just like...

Caleb Brown: Laundry list of stuff.

Lauren Hong: Yeah! Almost like, I don't want to call it, but like a ChatGPT. Not that someone would hear that. But it just feels dropped in the keywords, filling in the block, the check in the box, not exactly sure who we want to hire. You can get all these cues that really go, “What is the energy that this firm is trying to put out there? And are they kind of doing it the way they've always done it or are they trying to be more progressive?” So.

Caleb Brown: And you mentioned chat GPT. I mean, let's talk about that for a minute. I mean, do you see that or firms just trying to rely on that and just like, “Here's the job description.”

I see that on the candidate side. Like when I see a bad resume, first question is like, “Was this AI generated?” Cause it's bad. The spacing is all screwed up. The stuff doesn't make sense. And it's fine to use that as a start. And maybe that's what you were going to, but then you got to go back and really work with it.

Lauren Hong: Yeah, I would say that I see it as a start, but if you're using it in the real world, that's like a big caution sign. Just as it is, right?

You got to add that human element to it. So, I'm not necessarily seeing firms literally use ChatGPT and then just taking a job description and posting it as is. But I am seeing it used more as a start to kind of get things going. So I think if you want quality, you got to be able to put the quality into it to be able to get the quality of the hire out of it.

And so that's where that, I think the higher level thinking for really who you want to hire and what you want them to do comes in. So.

Caleb Brown: Well, what about the marketing content? I mean, cause that's part of what you got. You can help kind of create a content and redo websites and all this type of stuff. Is that right?

Lauren Hong: Yep, yep, yep.

Ep#197: Filling Your Marketing Funnel with Lauren Hong

Caleb Brown: I mean, do you ever have firms that are like, “We’ll just put it in ChatGPT. We don’t need Lauren and her team.” I mean, how do you handle that?

Lauren Hong: Okay. So there’s like the ChatGPT example. There’s also like a lot of just pre-generated content. There’s tons of just content hubs you can purchase, especially in this space.

I’ll say for some firms that totally works, like they just need to put a band aid on the problem of just communicating, and it’s an option to be able to get something out there. It works in the short term, maybe for that limited time, but not in the long term. What happens is you start to Google, everybody else does the same thing that you do, drops your SEO, and frankly you lose the authenticity and the trust and the voice of what makes the firm different.

So part of being able to really tailor what you’re putting out there is making sure that you’re really speaking to your audience. And if you’re a candidate, and you go to a firm’s website and you can see that it is more tailored, it’s going to help you to know like, oh, they really focus on maybe like oil and gas executives or business owners or whoever it is.

And then it helps you to be able to say, “This is an interest of mine too. And now let me dig a little bit deeper.” And these advisors have list the exit planning, for example, certification, and they invested in this other individual to get this—insert another designation, right?

And so you can start to see, you can connect the dots between all of these other initiatives that the firm’s doing to really lean into a particular target, lean into messaging, and really their positioning for how they want to show up in the world and who they want to attract back.

Caleb Brown: It’s part of my screening process when the prospects come to me for the recruiting firm, I always go to the website, pull ADV and all that stuff. I was on a prospect call recently and I had to reveal to this person, and they were devastated, like, “You know that the homepage of your website, the picture of the couple and the family walking on the beach, I’ve seen that before.”

And they were devastated. They’re like, “Oh my gosh.” I had to show them the other firm. And I mean, so to your point, it’s like, you don’t want to have a lot of the same stuff out there. And I want to keep going on the conversation, but before we move on, can

Ep#197: Filling Your Marketing Funnel with Lauren Hong

you give us just how often do firms need to update their website, and what kind of investment do you—is there a percentage of budget or something? Or “Hey, it’s going to be \$10,000 every two years.” Or is it really just so far off—like it just depends?

Lauren Hong: So you’re probably going to update your website every five-ish years. I’m going to say plus or minus, right, a few years. It just depends on where you’re at and your growth goals, so on and so forth.

And there’s a lot of other situational things that you might be going through that might necessitate a redesign. Cost can also really, really vary. Website projects can go, I’d say, on the low end, \$12,000 to well over \$200,000. It just depends on what you’re trying to do. But I usually see a key trigger to be able to make significant updates if there’s an internal strategy shift or the firm’s just outgrown what they’ve put out there.

So, yeah.

Caleb Brown: And then this is beyond, like, adding it to somebody on the team page, right? These are being sort of covered, reduced?

Lauren Hong: Yeah, this is like full redesign. Yep.

Caleb Brown: Okay, so I’m a new planner. I get hired at a firm. I’m in a hybrid role, right? Like, okay, they’ve got some clients for me to work on. “I’m kind of helping do some other things, but I need to get some clients of my own.” Have you seen anybody if your clients hire someone like that? And if so, if they’ve had success and how they’ve had success?

Lauren Hong: Totally. Okay. It’s a great question. So actually, I will see firms, especially firms that have a strategic positioning of really looking to hire advisors and help them build out their book of business position on their careers page, marketing as an asset, and all the things that they’re doing to be able to help recruit prospects.

So that the advisor comes in and then they know that they’ve got kind of a ready to go game plan to be able to tap into. So what I see, firms that are doing that do it really well, I’ll just talk a little bit more specifically because there’s a lot of components to go through, but for hires that come in and they’re just getting onboarded, and if they’re seeing you as someone that’s going to be doing business development, one of the trainings that you’ll typically go through is just a high level of the brand, like how to utilize the brand, how to talk about the company, brand assets, where to find your basic

Ep#197: Filling Your Marketing Funnel with Lauren Hong

templates, like, you know, if you need to do a PowerPoint template, or what have you, and then what are all your sales materials that you have ready to go.

So, for example, DAX and what have you. So, there's kind of, I'm going to call it like your communications hub if you're doing your onboarding. There's likely a place where all these communications materials live. And ideally, there's some sort of training that goes around it to be able to help you learn what you have access to.

And kind of the do's and don'ts of being able to learn how to utilize the brand. Then, I also see firms that are actively recruiting digitally where they have specific campaigns and campaign efforts that are to recruit prospects. And so, knowing that you've got that kind of behind you and that you might be able to participate that, and that is something that you could grow into as you are with the firm longer.

So, for an example. There's a firm that we've worked with where they do webinar campaigns, and their advisors help to lead those webinars, and that might be something as an advisor that you could be a part of or you could sit behind the scenes. We have another firm that we work with that has advisors write copy or specific blog posts that are directed at their specific target market.

And so that might be something that you can focus on. Like if you're on a team or you kind of really lean into a particular audience, you can maybe tap into that resource as well. So things like that that are maybe already in place and running or opportunities that you can kind of explore or perhaps even suggest as you're getting into your seat and looking to do some business development.

I will say though, just as one of the “be careful” as a new advisor joining a firm is sometimes we see marketing collateral as, like, I'll call it like a safety blanket, to be able to put in front of prospects. So usually with marketing collateral, you might need one or two that you use all the time, but I'll just put this asterisk of you probably don't need dozens and dozens of things for every single situation.

So just know they're really, really good ones, and you'll probably end up using those a few times. So just as a little note in there.

Caleb Brown: Any rules of thumb that come to mind? I mean, I think it was Nick Murray, maybe earlier in my career, or heard him speak. He's like, “Look, if the prospect asked for you to send them something or more information, like they're not going forward.”

Ep#197: Filling Your Marketing Funnel with Lauren Hong

The answer is no. It's like, do you see stuff like that? Do you have any data out there that says if they—and I think it was one of my NextGen buddies, Jude Boudreau, said if they thank you for your time at the end of the meeting, they're not going for all this crazy stuff.

Lauren Hong: I know. “We're not in a rush.” Like there's keywords. You're like, “Oh boy. Okay.” Or it's like crickets, that kind of thing, and you're like, “All right, well.” You don't want to be like, you want to be a squeaky wheel, but not too squeaky, right? I would say materials that I see work really well when a prospect is kind of deep in the funnel, like you're having a conversation.

Case studies, they don't have to be a specific client, but they're literally—you don't want to put the client's name obviously and things like that, but you've got a case study. You can help tell a story because this is a really complicated, very specific offering that you have that requires a lot of trust, and sometimes telling that story really, really helps.

So case studies are a great way to tell those stories as leave behinds. I see firms too, especially if they are working with a client for a little while, or they're kind of on the edge if it's a good fit, and there's a firm we've worked with for a while and they have it's called like “The Top 40 Things That We Do” and it breaks down to all these nuanced things and it might be specifically for these business owners earlier. Things that you know they might support with that are related to that that you just feel out of the box, and they kind of work as upsells, but it's like, “Gosh darn it. This is a lot of things I had no idea.” That you went into this particular vertical or what have you.

And so those are good tools that help to kind of, you're not gonna have maybe time to talk about them all in one call, but you can pass that as a, “Did you know?” so that you don't kind of lose sight of those other things the firm can do.

Caleb Brown: On the branding piece, and I think you touched on this earlier, but if someone joins a firm, I think what I heard you say is “Ride their coattails. Go with their branding. Don't go over here necessarily.” And not just like, “Hey, Kayla Brown's hanging out his own. He's kind of got his own.” I mean, it's obviously different if they start their own firm, right? So part of your work is helping people come up with their branding.

In the old school, it's just like, well, “Caleb Brown Financial Services,” like really, really easy. How do you help people or what do you see the biggest hurdles and mistakes on when people are developing their brand?

Ep#197: Filling Your Marketing Funnel with Lauren Hong

Lauren Hong: Oh my gosh. When they're developing their brand, well, I'll just say this. When you first get going, you're just trying to figure it out.

Like, you may not have clarity, and I think it's not until you're a little further along that you get clarity. So if you are an advisor that's joining a firm that has clarity on where they're going. They've been around for a little while. They're comfortable in their own skin. They know where they stand.

They probably put a lot of effort into figuring that out, and ideally, their brand assets, namely their website, their logo, their marketing slicks reflect these things. So if you get in there and you start ripping the logo off of, you just go get the image file and rip it and start making your own collateral and stuff.

I'm just gonna say, like, you're gonna walk yourself into a trap, right? You're gonna fall down, just dig yourself a hole. As an expression, you're digging yourself a hole, right? Because part of the asset is the brand, and so you want to make sure you're upholding that.

And that's really important to kind of get a grip on that. And firms have all different ways of displaying that. Sometimes folks are like, no jargon at all. Other firms are much more technical in the way that they talk with their clients. And that just might be because of their clientele or kind of what they're known for.

Other firms have like more religious or political bins. And so the part of the messaging and the recommendations are around that. And so these are all value sets that you'll likely be cued into as you're going through the hiring process, or you could even glean from things like social media or the website, so on and so forth.

But it's important that you get a feel for that because that's part of what defines the fit. And I just put a caution around going and creating your own stuff because guarantee marketing's gonna come down and be go, whoop! "What are the breaks? Like, what do you need? How can we support you? And do you really need that?"

We might actually have something in place to solve that problem.

Caleb Brown: Got it. And whether you start your own firm or join another firm, I know we've talked about some marketing materials and strategies, but I think the biggest question and the biggest struggle is like, how do you fill the funnel? How do you get the people in the top of the funnel? Any thoughts there?

Ep#197: Filling Your Marketing Funnel with Lauren Hong

Lauren Hong: Oh my gosh. If you are just starting your firm or you're just kind of getting going, I will say that for better or worse, marketing in the world out there digitally is a lot of noise and they're going to tell you, you can do a lot of things, but you've got to be able to tune out all that noise, know who you want to go after, pick a target and just spend all your time and energy getting to know that audience, showing up where they show up, and really don't waste your time kind of going around and doing every networking event.

Just really, if it's working, if your COIs are working, build those relationships, nurture those relationships, and find more people that are like that, right? Maybe if you're starting, I see a lot of new planners, and they want to work with folks that look like them. That's how a lot of advisors kind of grow in their career.

Maybe you want to go and work with others that are like newly married or younger families. Like, where are those individuals? Show up where they show up. If you can, write content about that audience. Add value at that time and help pull that in and be kind of a magnet to that audience.

But don't go and try and go after folks that are going to retire or that might have just gone through a divorce or this kind of thing. Just really narrow your efforts and you're going to get the highest return if you do that because otherwise you're just going to be going everywhere, and it's not going to be as, it's just not as focused, which means you just don't get as high as a return on your efforts.

Caleb Brown: And I just want to reiterate a couple times you said when I've asked like, "Hey, you may not have it figured out right at the beginning and that's okay." I want people to get that's okay.

Lauren Hong: It's totally normal.

Caleb Brown: These people that are on the front of the Wall Street Journal, they had to figure all this stuff out, too. They didn't have it the very first day when they started their RIA.

Lauren Hong: Totally. We have firms are like, "We've just opened up and we want to be on the Wall Street Journal." And I'm like, "Whoa, baby steps, baby steps." And we're not even a PR agency.

Ep#197: Filling Your Marketing Funnel with Lauren Hong

Like we're not working the media. That's not one of our things, so you gotta start somewhere and you take one step and then you go to the next step and that's how you figure it out, so.

Caleb Brown: In your book of clients, just as you were calling like the firms you've worked with that have hired well, have retained team members, and not necessarily new planners or advisors, but just the ones you see, again, kind of by what I said earlier, just have it together, what are they doing differently during the hiring process and the training or to retain these people and keep them there?

Lauren Hong: I think a lot of it has, I mean, just really simply comes down to culture and then living out their values. So there's a firm I can think of we worked with now for five years, and one of their values is around this balance of they really want their clients to be able to enjoy their lives and not just working their tails off all the time, and they live that value to their team with flexibility for travel and family and all of that.

That same firm, the way that they work is everyone has clear swim lanes, but they involve the right people where they need to be involved in different projects so that people feel ownership of the marketing and the initiatives that are going on. They invest and they pay it forward with their team, with trainings, they just redid their office.

They've got just a beautiful office space and experience that they've created for their team that's important to them. So it's things like this that along the way there's these trickles that are smaller, but then also bigger initiatives and investment to pour into their team. And as a result, their team is pouring back into their clients, and they're also growing and retaining clients faster than others that I see.

So, and I also think at the end of the day, their leadership is just really clear on what they want to do and where they want to go, and they communicate that to the rest of their team as well.

Caleb Brown: And I get that a little bit from the candidates. I ask them, "Why are you there?"

I always ask them, "Why do you want to leave? Why are you staying there?" It's like, my ownership, my leadership, they're trying. They consult with us on this. They're trying to be flexible on the schedule, and, hey, they may not get it right, but just the fact that they're trying and they care about me as a person and a professional, that goes so far,

Ep#197: Filling Your Marketing Funnel with Lauren Hong

especially with these new younger generations, and maybe it didn't for some of the older generations, but it's something that pops up often.

Lauren Hong: Totally. Like, even like reviews, just like feedback. We wanna grow, right? That's an avenue that you can lean into. I know it's not the most fun thing to do for everyone, right? But it's important. So having those reviews built in, if it's a 360 review or a one on one and just feedback along the way, all these things really, they really make a difference.

Caleb Brown: Well, any other stories you want to share or anything that you're seeing out there that you want to highlight that you think the audience would care to hear?

Lauren Hong: I think at the end of the day, it really circles back to firm clarity and what they're looking for with a hire and ultimately where they want to take the business.

And I think that if you're in a position that you're looking to join a firm, don't hesitate to ask those questions. Snoop around on social media. If you've got a job offer and they're willing to let you talk with other people within the company to kind of feel out if it's the right fit, I would take them up on that offer.

And then I would also just lean into this level of personalization and just the simplicity of saying "Thank you." I can tell you as someone who's hired a lot of people, and I've interviewed a lot of people, I don't see a lot of cover letters that cross my desk that I can tell are not a cut and paste.

The ones that actually stand out are the ones I can tell they've read our website and they've done the due diligence, they've called something out. And then it's the candidates that not only was there something in the interview with the energy that they bring and their experience, but it's also the ones that after the interview, they take the time to send a thank you, like just immediately, like "Thank you. This is what I appreciate. I'm really looking forward to hearing back from you."

I had a candidate that we weren't sure if we were going to hire them or this other person, it was really tough, it was like neck and neck, and the next day I walked into the office, and underneath the office door, they left literally a handwritten note. They stopped by. And I had goosebumps.

I'm like, whoa, this person really wants it. They went above and beyond to just say thank you. And it was simple, but it was really meaningful. And it's that kind of person that I

Ep#197: Filling Your Marketing Funnel with Lauren Hong

want on my team, and that's harder to hire for, right? So I think it's those things that kind of stand out.

And I would just say as a candidate, if you want something, say you want it. And you can say that through just simply saying thank you. And if you don't get it, still respond to that message. Because you never know. Something could happen later on, or there might be an opportunity.

Leave with the best impression that you can leave, and I think that that helps to show true colors for your own character, especially if you found a firm that you think fits you and would provide the opportunities for you to grow, and for you to be able to give back to that company. So just some thoughts, personal thoughts too.

Caleb Brown: I'm glad you mentioned the gratitude piece. I feel like that gets lost by the wayside oftentimes in our society now.

And then the other thing that I would just point out is here's what I tell the job seekers. The firm should offer during the interview process for you to go out to lunch or spend some interview with some other people. And if they don't act like, which to your point, ask, "Hey, can I go to lunch with some of the people that I'm going to be working with or my supervisor or someone that's held this job?"

And the firm should be absolutely open. Like, "Absolutely. We want you to." And if they're not, that might be a little bit, to your point, early at the top of the call, a red flag. "Uh oh, what have I gotten myself into?" This has been so fun, Lauren. Thank you for coming on and sharing all your insights.

Any final comments or anything? I just want to make sure you've been able to share what you wanted to.

Lauren Hong: No, I just appreciate the opportunity. I appreciate what you do and supporting advisors. It's really important work that's done and getting them into finding the right fit with the right firm.

Caleb Brown: Thanks for coming on the show, Lauren.

Lauren Hong: Thank you.

Ep#197: Filling Your Marketing Funnel with Lauren Hong

Thanks for joining us for this episode of the New Planner Podcast. If you are ready to discover the top career paths for financial planners and see which track is best for you, we created a free guide to help you.

Grab your copy of the Financial Planner Career Roadmap at
newplannerrecruiting.com/roadmap.

There, you'll also find more tools and resources all created to help you build a successful financial planning career.

Tune back in next week for another episode, and until then, we are here to help you succeed.