



MULTIMEDIA PRESENTATION CONSULTANTS

# ZERO TO LEADS IN 90 DAYS

**“Communication as a Performance Variable”**

The MPC Flagship Intellectual Property





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# Executive Manifesto

Advisory firms do not lose growth because they lack expertise. They lose growth because expertise is invisible until it is experienced.

**“Two advisors walk into the same client meeting. One has 25 years of credentials. The other has clarity.”**

The first advisor hands over a polished résumé and a performance deck. The second has already answered the client’s questions in short videos they watched the night before. By the time they sit down, one is introducing himself — the other is being welcomed back.

In a mature RIA marketplace, credentials open the door. Clarity earns the trust.

Trust is not granted by credentials alone. It is constructed through perceived competence, benevolence, and integrity (Mayer, Davis, & Schoorman, 1995). In financial decision-making environments defined by uncertainty, perceived trust reduces relational risk (Slovic, 1987).

Repeated exposure to a communicator increases positive sentiment toward that communicator — a phenomenon known as the mere exposure effect (Zajonc, 1968). Structured video communication accelerates this familiarity loop.

Investors are loss-averse (Kahneman & Tversky, 1979). They hesitate not because they lack opportunity, but because they fear downside. The advisor who reduces uncertainty reduces hesitation.



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The objective of this framework is not views.

It is the systematic reduction of psychological resistance.

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# Industry Structural Shifts

The RIA channel has matured. Differentiation now depends more on experience clarity than credentials (Cerulli Associates, 2023).

Prospects conduct digital due diligence prior to scheduling meetings. Initial interaction theory suggests that uncertainty reduction precedes trust formation (Berger & Calabrese, 1975).

Distribution is now the storefront.

Compliance frameworks under SEC Rule 206(4)-1 require all marketing communications to be fair, balanced, and not misleading.

In this environment, communication cadence becomes a competitive advantage.

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# Behavioral Finance & Influence

Investors exhibit:

- Loss aversion (Kahneman & Tversky, 1979)
- Familiarity bias (Huberman, 2001)
- Ambiguity aversion (Ellsberg, 1961)
- Emotional contagion (Hatfield et al., 1993)



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Multimedia learning research demonstrates that dual-channel processing improves retention (Paivio, 1971; Mayer, 2009).

Tone, pacing, and expression influence credibility judgments (Ambady & Rosenthal, 1992).

Education reduces uncertainty. Reduced uncertainty increases decision likelihood.

Influence is not persuasion.

Influence is the gradual elimination of ambiguity.

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# Advisor A vs Advisor B — A 90-Day Divergence

Advisor A:

- Quarterly newsletters
- Referral dependent
- Reactive communication

Advisor B:

- Weekly short-form clips
- Bi-monthly explainer videos
- Personalized follow-ups
- CRM attribution tracking



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By Day 30: Increased exposure (Zajonc, 1968).

By Day 60: Familiarity lowers risk perception (Slovic, 1987).

By Day 90: Trust formation accelerates decision-making (Mayer et al., 1995).

Prospects consuming repeated educational content demonstrate higher engagement and more decisive behavior (Barber & Odean, 2001).

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# INTO ACTION

## The 10 Tactical Playbooks (checklist in appendix)

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### 1. Question Inventory Playbook

**Tactic:** Build content from real investor questions.

**Execution Model:**

- Identify top 50 client questions.
- Categorize by risk, tax, retirement, estate, process.
- Assign weekly video topics.

**Distribution:** Internal content calendar driving LinkedIn and YouTube cadence.

**Behavioral Basis:** Ambiguity aversion inhibits action (Ellsberg, 1961).

**Compliance:** Content must remain educational and avoid individualized recommendations without an advisory relationship.

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## 2. Hook Point Engineering

**Tactic:** Capture attention within the first 8 seconds.

**Execution Model:**

- Emotional relevance opening.
- Pattern interrupt framing.
- Immediate clarity.

**Distribution:** Native LinkedIn video prioritized.

**Behavioral Basis:** Threat-biased attention (Baumeister et al., 2001).

**Compliance:** Avoid exaggerated or misleading urgency.

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## 3. Short-Form Authority Clips

**Tactic:** Weekly 60–90 second clips.

**Distribution Stack:**

- LinkedIn native
- YouTube Shorts
- Website embed
- Monthly email insert

**Behavioral Basis:** Familiarity bias (Huberman, 2001).

**Compliance:** General informational disclaimer required.

## 4. Mid-Form Explainers

**Tactic:** Two 3–7 minute explainer videos per month.

**Distribution Stack:**

- Primary YouTube archive
- LinkedIn upload
- Blog integration
- Email nurture

**Behavioral Basis:** Transparency increases perceived integrity (Mayer et al., 1995).

**Compliance:** Balanced discussion of risks required.

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## 5. Personalized 1:1 Video

**Tactic:** 45–60 second triggered responses.

**Triggers:**

- Guide download
- Referral introduction
- Consultation booking

**Behavioral Basis:** Reciprocity principle (Cialdini, 1984).

**Compliance:** Avoid individualized investment advice outside formal agreement.

## 6. Distribution Strategy Playbook

**Tactic:** Multi-channel distribution architecture.

**Primary Channels:**

- LinkedIn (organic professional reach)
- YouTube (searchable archive)
- Website resource hub

**Secondary Channels:**

- Email newsletter
- Blog embedding
- Client portal content library

**Operational Checklist:**

- LinkedIn native
- YouTube upload
- Website embed
- Email insert
- CRM tag

**Behavioral Basis:** Cognitive availability bias (Tversky & Kahneman, 1974).

**Compliance:** Archive all communications. Monitor and supervise third-party comments.

## 7. CRM Attribution Playbook

**Tactic:** Track measurable conversion.

**Metrics:**

- Watch time
- CTA clicks
- Consult booked
- Show rate
- Close rate

**Behavioral Basis:** Data reduces bias in decision systems (Thaler & Sunstein, 2008).

**Compliance:** Data privacy standards and cybersecurity protocols required.

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## 8. Compliance Integration Playbook

**Tactic:** Pre-approve templates and workflows.

**Workflow:**

Draft → Review → Approval → Archive → Publish

**Behavioral Basis:** Structured governance increases perceived reliability (Mayer et al., 1995).

**Compliance:** Marketing Rule adherence mandatory.

## 9. Content Repurposing Flywheel

**Tactic:** Multiply asset ROI.

One explainer becomes:

- 3 clips
- 1 blog
- 5 quotes
- 1 email insert

**Behavioral Basis:** Repetition enhances encoding (Paivio, 1971).

**Compliance:** Ensure derivative content preserves disclosure context.

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## 10. Optimization & KPI Hierarchy

**Ranked KPIs:**

1. Consultation Conversion
2. Qualified Lead Volume
3. Show Rate
4. Engagement
5. Watch Time
6. Impressions



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**Behavioral Basis:** Outcome metrics drive economic return (McKinsey, 2022).

**Compliance:** Avoid presenting modeled improvements as guaranteed results.

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## 90-Day Implementation Framework

Phase	Focus	Output
Days 1–30	Attention	Weekly short clips
Days 31–60	Authority	Bi-monthly explainers
Days 61–90	Conversion	Personalized video triggers

Cadence builds familiarity. Familiarity builds trust. Trust builds meetings.

## \$500M AUM Modeled Case Study

Harbor Ridge Advisors (fictional, realistic):

- 28 consults booked
- 21 held
- 12 proposals
- 7 closed
- \$18.2M new AUM
- ~\$182,000 recurring annual revenue

Decision cycles shortened due to pre-meeting familiarity.

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## Capital Allocation Implications

Communication is capital deployment.

Video assets compound.

Governed systems outperform improvisation.

Flagship intellectual property becomes a strategic mo

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