

Four Six questions

1. What specific business objective am I trying to accomplish with this project?

Why is this important?

- a) More clients, attract more leads so he can get more sales call. The main objective here is to get at least 1 sales call everyday.
- b) Also as a second but less important objective is to nurture the relationship with the audience

2. What part of their online presence/funnel is needed to achieve this objective?

- a) I've analyzed the top players and in this case they are doing almost everything via organic content in different social medias, in this case we are going to use his **instagram** as his main social media, because at the moment it's the one that has done the best job.
- b) We are making **Instagram reels** in order to get their attention, and then make the persuasion cycle so we can get them into the sales call. Basically grab them from the current point that they are **(which is awareness level 1 and 2 & sophistication level 3)** to level 4 which is to schedule a sales call and then buy the product.

3. Who am I talking to?

- a) Both men and women. People in Mexico who are earning at least \$20,000 MXN a month, who are between 25-40 years old, (who want to invest in something to build wealth but don't know where)/(Who want to start investing in their retirements)
- b) People who are primarily employees (9-5) who want to start building their heritage.
- c) **Awareness Level: 1 & 2**, much of the content on social media essentially exposes that AFORES are no longer sufficient and why one should opt for a Personal Retirement Plan. Many people are unaware they have this problem. In other content they produce, they highlight the problem people face and then provide the PPR as the best solution.
- d) **Sophistication Level 3** (not very sure about this): We are not the first or second in the market, and there is no mention of a mechanism as such. The funnel usually resembles the script mentioned above. There are people who are interested in what we offer and there are people who no longer believe the claims we make.

4. Where are they now?

- a) Physically:
 - They are scrolling on social media

- Probably scrolling while they are on their jobs, wasting time, going through the motions
- Maybe they are scrolling in their homes, entertaining themselves, or maybe in the bathroom

b) Mentally:

- They know deep in their souls that they need to start investing, building their heritage, or at least save some money in order to have an ok retirement (Problem aware).
- They also know that they will not retire by the government, they will not maintain them anymore (as it used to be) and that they are the only ones responsible for their retirement. (Problem aware)
- They would like to save some money, to start building and creating wealth, but they do not have a financial education, they also don't have a very good relationship with money.

c) Current state: They are living a normal matrix life, normal jobs, normal car, normal house, normal wage, basically 9-5 matrix individuals.

They are not precisely concerned about escaping the matrix, but they want to build wealth for their future, they don't know exactly how. They don't have a very good relationship with money.

They are also worried about their retirement, maybe not that much but they know that they are getting older, and they don't have any savings or investments for when they are older

d) Dream state: They want to live a peaceful and (preferably) abundant retirement, they don't want to have concerns about money.

They want to be able to pamper their grandchildren or loved ones when they retire.

The typical grandpa who has a beautiful garden and is enjoying a peaceful and calm retirement for the rest of their lives.

e) Awareness level: 1 & 2 (We also have level 3 but to a lesser degree)

f) Sophistication level: 3 (not sure)

5. Where do I want them to go?

- comment on my video
- Schedule a call
- buy one of the PRP available
- Start enjoying life knowing that they will be safe in the long run.

6. What specific steps do they need to go through in order to achieve this objective?

- Stop the scroll
 - Movement
 - Hook - Promising some value or creating curiosity by asking good questions → For example: "Facts that *they* don't want you to know"
- Consume content
 - Quick transitions
 - Present valuable information
 - Present the info in a "digestible" way

- D. promising the possibility of a greater reward in some time
- c) Comment on the video
 - A. present them an opportunity by saying “Comment on my video so we can start building your wealth” for example.
 - B. Lower the cost by saying that the advice is free or something alike

From there on he would close the sale on the sales call.

Reader's roadblocks:

- They consider that the PRP are a little expensive, they consider that they will need to sacrifice a considerable amount of their money. That they need to maintain a family or whatever and they can't save enough to pay.
- They also have the fear that they are going to save a lot of their money but they don't know if they will be able to enjoy the money at the end of the day, they don't know if they are still gonna live by that age. SOME of them have the mentality of “I'm going to spend all my money today because I don't know if I will live tomorrow”.
- (Some of them) Consider that they can invest that money into other things and get a better return, also that the money they will invest they can spend on other things like vacations or clothes or something like that.
- They also think that the company that is offering these PRP and are investing their money will disappear or go bankrupt.
- They also have the fear that if they stop paying the company will keep their money because of the contract.
- Even though we are offering an alternative to AFORES (explained below) they still consider that they will receive a shitty amount of money in their 60's 70's.

Ognjen requirements:

1. Give us the whole context.:

My guy is a 23-year-old man, a financial advisor who helps people increase their wealth through long-term investments. He mainly sells Personal Retirement Plans, which help people in this country retire with dignity.

In this country, there is something called AFORES, which is a government program supposed to help Mexicans retire with dignity once they reach retirement age. However, it doesn't pay well, only around \$200-300 dollars per month, which isn't enough. So, there are these things called Personal Retirement Plans, which are an alternative to AFORES. They invest in the stock market (usually in ETFs like the S&P 500), generating a return of around 12% +/- compared to AFORES, which generate around 6% +/-.

He is associated with insurers that originally sell these plans, namely Allianz and Seguros Monterrey New York. So, he attracts attention on social media, directs them to a Zoom call, where he evaluates the situation and the client's investor profile, and based on that, offers them one of the plans offered by both companies. This is basically how these companies operate, despite them also attracting and managing clients themselves. They have people like my client and others who attract clients for these companies and earn a commission.

In addition to that, he provides other types of advice, but the main business is capturing prospects via social media, directing them to the sales call, and then selling them one of these plans in a personalized manner based on what the client needs.

He makes videos that are his own, but often they are copied from competitors. In fact, they often copy each other entirely, even on their profiles you'll find identical content. And in fact, they also often repeat several of their videos but in a different format or under different conditions (but the idea is the same). This is a fairly popular script they are always repeating:

" If you save \$500 weekly

From your 30s

By your 65s you would have \$840,000 in pure savings

But invested in an indexed fund you would accumulate over \$6,500,000

Interested in knowing how? Ask me in the comments "


<https://www.facebook.com/reel/1352864142072965> (same script translated)

There are variations of this script, but the mechanism is usually the same.

He has been in this market for approximately a year, while his competition has been around for longer.

We agreed that as a discovery project I would make him scripts for the videos in order that he could get more sales and reach more people, after that we could move on to ads or something.

2. Tell us about the avatar.

 Copia traducida de Avatar creator

3. Market and customer sophistication, based on the diagrams.

Awareness Level: 1 & 2, much of the content on social media essentially exposes that AFORES are no longer sufficient and why one should opt for a Personal Retirement Plan. Many people are unaware they have this problem. In other content they produce, they highlight the problem people face and then provide the PPR as the best solution.

Sophistication Level 3 (not very sure about this): We are not the first or second in the market, and there is no mention of a mechanism as such. The funnel usually resembles the script mentioned above. There are people who are interested in what we offer and there are people who no longer believe the claims we make.

4. What type of business/niche are we talking about?

Financial advice, wealth management, retirement plans.

5. Tell us what product your client sells.

Personalized Retirement Plans (PRP's): Basically, it is an alternative to AFORES in Mexico. AFORES are a governmental program where workers are helped to save for a dignified retirement. The worker makes contributions to this savings via payroll deduction, and the employer and the government are also obligated to contribute a portion. However, it is known that AFORES are quite mediocre, as in future value, you end up retiring with \$200-\$300 dollars per month. AFORES invest in quite conservative instruments that provide a very low return (6.25% being the highest), while Personal Retirement Plans (PRPs) invest in the stock market, mainly in ETFs that track indices like the S&P 500, which give a return of 12%-13%, which is a significant difference in the long run. For example: it is often mentioned in the videos that if you invest in an AFORE throughout your life (\$840,000), you end up with around \$1,600,000 +/-, but due to inflation, this money will be less valuable at retirement age, whereas if you invest in a PRP, you would accumulate \$6,500,000, depending on age, time, and the amount invested.

In a nutshell: alternatives to the retirement plan that government has but with better returns (6% government, 12-13% PRP)

6. Tell us what your client has tried before (why did it work/why didn't it work?).

He tells me that he has tried copying the videos like everyone else is doing, sometimes it has worked and sometimes not. He also tells me that he wants to grow on FB and TikTok but it doesn't seem to work no matter how hard he tries. His main source of lead generation at the moment is IG. He has tried various types of content but it seems like he's fixated on what he's doing because it seems to have worked the best for him.

7. Tell us every measurable metric the client's gotten somewhat recently.

He tells me he has had about 5 viral videos throughout his career, he has managed to capture some prospects with some of the videos he's had, but recently he hasn't had anything viral, also for some reason his views have dropped in the last few days. So views, but results dropped...

8. Tell us what his current revenue is.

I haven't asked him, so it would be difficult to give an answer. At the time of our call on April 18, he mentioned that he had had 3-4 appointments in the month, honestly, I don't know what the commission is. His goal is to reach one appointment per day.

9. Tell us the source of your client's attention (with numbers for attention).


He and most of his competition get attention through organic content on social media, **primarily reels on FB and IG**, TikToks, sometimes images on social media, also on some stories but not that much, but **his main social media is Instagram**.

10. How does the funnel work?


- a) They watch an instagram reel
- b) Comment on the video

- c) Client (mine) reach to them via DM
- d) They schedule a sales call
- e) Sales call
- f) Close deal

Avatar:

 Avatar creator En.

Market research template:

 Market Research Template

 **COPY** 

Video: Roleplay

Title: Investing big in small things

[INTRODUCTION]

A: Javier, I want to start investing and build my assets. How can I do it?

B: I congratulate you for making that decision! How would you like to invest in the 500 largest companies in the United States?

[BODY]

A: Wait, I don't have that much money to start investing in those companies.

B: Actually you can start investing in them from \$1,500 per month

A: I don't understand... How is it possible to invest in so many companies with so little money?

B: There are instruments called "Indexed Funds".

Basically, what they do is put together the shares of those companies and sell them to you as if they were a single share.

This way you can invest in multiple companies in a single transaction, making investing easier.

A: Interesting!

B: Additionally, this reduces the risk.

Since by investing in several companies at the same time, you are automatically diversifying.

This means there is less risk of losing your money if one of the companies fails.

[CLOSING]

A: And how can I start investing?

(You turn around and look directly at the camera)

[B: If you are interested in how you can start investing in an index fund, leave me a comment](#)

NOTES: I have seen Top players using this kind of strategy in their videos and then getting literally thousands of responses, so I just modeled it, made it a lil bit better.

I felt that this sound as a sort of infomercial at first so I corrected it, but I still feel that it sounds like that... I used the AI to make it more human and more natural, but I still feel that. But right now I don't know what should I add or subtract to make it sound even better, I feel that if I take something away then I don't give enough explanation, I would be giving a really fast liquidation of the mechanism, but also don't want to add because TikTok brains...

Video: Financial Tips for YOU

Script:

[INTRODUCTION]

Here are 3 financial tips that you can apply TODAY to improve your financial situation..

[BODY]

1. **Number one, Invest in your education and your mind:** You've probably heard it many times, and it's no wonder. Without the right mindset, no matter how much money you have, you could lose it all. On the other hand, with the right mindset, even without money, you can build a fortune. Spend time reading books, attending seminars, and surrounding yourself with people who inspire you and motivate you to grow.
2. **Number two, Accept calculated risks and take action:** You have to understand that failure is an inevitable part of the path to success. If you avoid failure, you will also be avoiding success. Remember, we as humans learn more from our failures than from our successes. Analyze each opportunity, evaluate the risks and don't be afraid to take the first step. Action is the key to any meaningful progress.
3. **And number three, Learn the difference between income and wealth:** And many come to confuse the two things thinking that they are the same. Income is money that comes in regularly, while wealth refers to the assets you accumulate that generate more income over time. To build wealth, you not only need to earn money, but also invest it wisely and make it work for you.

[CLOSING]

Remember, I provide you with the information, but you are the one making the choices.

[If you are interested in receiving financial advice, comment "Advice" or follow the link in my profile](#)

END

NOTES: This is not mainly to schedule a sales call with a prospect but to nurture the relationship with the current audience by providing some free value.

But I also do the CTA because I see that's something that other players are using, even in the free value content, they don't schedule that many sales calls with this, but a sales call is a sales call...

Because making a lot of videos of him talking about this product would be overwhelming or boring, I'm trying to vary it a bit while providing free value.