

1. Give us the whole context.

I landed a client through warm outreach. He needed to remake his website. The copy was poorly written and the design is not great since he got them made 10 years ago. I met with him and told him I could rewrite and redesign the whole thing.

He is doing well financially and is not struggling to find new clients. While he appreciates new clients with a portfolio of over 200k CAD, he is not actively looking for them. At this stage, he's made a name and a lot of his clients were obtained by word of mouth. He just wants the website to look more professional.

Side note: (I would appreciate some advice on this)

I started writing the copy while he was trying to obtain access to the wordpress dashboard. I then started to update the plugins and Wordpress itself but ran into a problem. It was so old that it caused a fatal error. The website was unusable and despite my best efforts I could not fix it. He did not know which service provider was used and even with access to the cpanel, I was unsuccessful. I am far from being an expert when it comes to the technical side of things.

We went back and forth and I told him to find someone qualified to handle this. He did but now part of him blames me for this and that's understandable. I took full responsibility for what happened. He still wants me to redesign the website but he is worried I might cause another issue.

How should one handle the client relationship in this case?

2. Tell us about the avatar.

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

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

Financial niche

5. Tell us what product your client sells.

He helps people build and protect their wealth through investments and insurance.

6. To send a link to the client's website and social media accounts.

<https://sfrioux.com/>

He does not really use social media.

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

Remaking his website has not really been his top priority.

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

No information

9. Tell us what his current revenue is.

No info

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

He mostly works on referrals.

11. Do 100 pushups/situps/squats.

<https://rumble.com/v501unn-100-pushups.html>

12. Plan to grow client

After over delivering for this website, I am going to sell him on SEO because I realised he wants to be seen and he hasn't really looked at it.

13. Winners writing process

- **Where are they now?**

*Awareness level 3:* As stated in the market research document, they already know what their problem is, they just don't know which solution fits their situation the best.

*Sophistication level 4-5:* I happen to know this from the client himself during our meeting. He uses experience and his track record to push them towards a decision but he mentions that all the potential clients he sees have already seen and some of them have even tried the mechanism but were not successful.

- **How to complete the objective?**

The good thing about this client is that he works mostly on referrals. So they are not far from the threshold concerning all three starting points. The plan is to make sure that they are well above the thresholds after visiting the website.

I did try to use logic to explain the mechanism but the market is sophisticated. So I focused on cranking their pains and desires.

Focused on increasing the dream outcome and reducing efforts and sacrifice (value equation)

- **What do we want them to do?**

We want them to book a call/meeting.

The bare minimum would be for them to send an email.

## Target Market

- What kind of person is going to get the most out of this product?
  1. Young professionals
  2. Pre-retired and retired people
  3. Business owners
  4. Families moving to the next step in their life (buying a car, buying a house, Insurance...)
- Who are the best current customers, with the highest LTV?

### CEOs

Professionals - Engineers, doctors, lawyers.

- What attributes do they have in common?

They all have money and don't know how to handle it. They want their money to be safe and invest to receive ROI but need to know how. They also have no idea if it is a good idea to make a purchase when it involves a large sum of money. They don't want to worry about whether their money is being correctly used.

They want to put enough money aside so that they can achieve their life goals later on or enjoy life when they retire.

They don't trust banks

## Avatar

- **Name, age and face.** This makes it much easier for you to imagine them as a real, individual person.
- **Background and mini life history.** You need to understand the general context of their life and previous experience.
- **Day-in-the-life.** If you can get a rough idea of what the average day in their life looks like you will be able to relate more easily to them.
- **Values.** What do they believe is most important? What do they despise?
- **Outside forces.** What outside forces or people does the Avatar feel influences their life?



Jimmy is 33 years of age. He is a prominent engineer in his particular field. He has dedicated his life to building his career. He took every opportunity possible to acquire more knowledge and skills pertaining to his expertise. Jimmy works full time at a chemical plant; he actually manages the plant itself.

He wakes up in the morning and gets ready to go to work. Once there, he works all day managing a team of engineers to ensure that the plant is functioning properly. He then gets home where he spends time with his dog and wife.

Jimmy is an orthodox man in terms of his values. He wants a family, a nice house and a couple of cars.

The young man is making rather a consequent amount of money. He knows the importance of saving money but realises that his money is losing value and he won't be able to achieve his dreams financially. Jimmy hates the bank and believes he should invest his money to hope to be able to achieve his financial goals but he lacks both the time and the knowledge to do it.

### Current State

- What is painful or frustrating in the current life of my avatar?
- What annoys them?

The lack of knowledge when it comes to saving and investing their money. They don't know where to start to gain ample financial knowledge in a short period of time.

It is also not their field of expertise

- What do they fear?

They don't know if later in life they will have enough money to afford the things they want. Working hard every single day and saving their money from paycheck to paycheck does not guarantee them the house and the car of their dreams.

- What do they lie awake at night worrying about?

Will the seeds of their efforts bear some fruits

- How do other people perceive them?
- What lack of status do they feel?
- What words do THEY use to describe their pains and frustrations?

### Dream State

- If they could wave a magic wand at their life and fix everything, what would their life look like?

They know that their money is not only safe but also growing while they sleep.

They don't have to worry about making major purchases in their lives. They know they have a plan to save enough money with interest to be able to afford those at key points in their lives.

Families know they have enough money saved for their kids' future.

Pre-retired and retired people know they have enough saved to enjoy their remaining lives. They can live a stress-free life without ever worrying about if they have enough money to experience certain activities.

- What enjoyable new experiences would they have?
  1. They would be able to go on vacations
  2. They would be able to afford cars and houses when they plan to.
  3. Retired people would be able to enjoy many kinds of experiences.  
(Visit other countries, cruises, ...)
- How would others perceive them in a positive light?

Someone who is smart with his money.

He would be perceived as intellectually superior being the one who made the right financial decisions.

- How would they feel about themselves if they made that change?

At first, they would feel stressed, not knowing if this would work. But if they trust the process, they will realize that they will be able to achieve their financial goals.

They will be happy and feel fulfilled.

If they have a family, they would be able to give the members of their families the lives they want or always wanted.

- What words do THEY use to describe their dream outcome?

They will achieve financial independence.

Financial security

Free from financial stress

## Roadblocks

- What is keeping them from living their dream state today?

Lack of knowledge when it comes to investing their money.

Lack of knowledge when it comes to handling their expenses. Can they actually afford certain products and services?

- What mistakes are they making that are keeping them from getting what they want in life?

They are not willing to take the risk even though they know that making the right decision involves contacting Sfrioux

- What part of the obstacle does the avatar not understand or know about?

They don't understand the mechanism by which the service provided helps them grow their investment.

- What is the one key roadblock that once fixed will allow them to move forward toward their dream outcome?

## Solution

- What does the avatar need to do to overcome the key roadblock?

Look at questionnaire given

- “If they contact sfrioux, then they will be able to achieve their financial goals”

## Product

- How does the product help the avatar implement the Solution?

There is a questionnaire that the client gave me.

- How does the product help the reader increase their chances of success?

My client has a comprehensive questionnaire about the financial state which is filled out by a new client. It involves investment time horizon, investment objectives, knowledge and a load of other questions of risk capacity.

This helps him build the investment profile of the new client and better tailor his decisions.

- How does the product help the reader get the result faster?

One step of the approach my client uses is a constant feedback loop. By consistently updating his clients and seeking feedback on the investments made, the solution becomes more tailor-made towards the customer.

- How does the product help the reader get the result with less effort or sacrifice?

JS(my client) does all the research about the market and has 32 years of experience. So most of the time, his clients just have to approve his decisions and watch their money grow.

- What makes the product fun?

JS actually makes it fun. He is very charismatic and funny. He knows how to set a soothing atmosphere and that helps his clients make better decisions.

- What does your target market like about related products?
- What does your target market hate about related products?

Customer service is not really on point. They testify that it is a hassle to get hold of their financial advisor and making changes about their plans become really difficult.

Sometimes they have little to no say in the financial advisor's decision.

#### 14. Personal Analysis (Problems and how I can fix them):

- CTA's : There are a couple of CTA's missing in the copy. I planned to and actually fixed that while creating a draft of the website appearance.
- I played a lot on fear and a bit less on the actual dream outcome. I am going to test by writing more on the dream outcome to see if it bridges any gap between their current state and dream outcome.
- There is very little copy written on the actual mechanism and that is because of market sophistication. I did not want to waste time explaining things his audience already knows.
- There is no social proof anywhere. I just mentioned his experience a couple times. I am however going back and forth with him to obtain some statistics and case studies. Top player analysis shows that boosting social proof helps. I will have a whole section about this.

## Our services

### 1. Disability insurance

- Statistics show that 1 in 5 individuals will face at least three months of incapacity before the age of 65. During those times, disability insurance could make a world of difference in your life.

Protect your income with disability insurance that pays when you can't.

- You might be thinking that the WSIB, the CSST, and the SAAQ also offer coverage.

True, but it is very limited.

If an accident happens anywhere else other than on the road or at work, you will not be eligible for any benefits[What are some examples of accidents that happen elsewhere?]. All those contributions will be reduced to nothing.



In contrast, disability insurance won't leave you stranded. It offers you a secure income during those tough times.

With an expertise of more than 32 years in the making in the field, Services Financiers Rioux' representatives will be right by your side, from insurance applications to claims.

We pride ourselves on our personalized service. Choosing what suits you best from all the products offered by insurance companies is our forte.

Disability insurance is an excellent product that is almost essential for self-employed individuals and other employed persons who do not have access to group insurance.

Discover how to keep your finances stable, even if life throws you a curveball.

## 2. Life insurance

- a. Do you have life projects but also worry about your family's continued financial security? Life insurance is the perfect tool to make both a success.

Learn the secrets to choosing the perfect policy with SFR.

- b. Will your assets be protected if you pass on? What will happen to your loved ones?

Life insurance is the perfect tool for safeguarding your estate. It will also pay for your children's education and will ensure that your loved ones will not be left penniless.

Life insurance is like a toolbox. There are several possible solutions for every need.

Permanent insurance, temporary insurance, life insurance for children, partnership insurance are just some of the types of insurance we offer.

It may sound confusing but we are here to help you pick what's best for you from a multitude of insurance companies.

Our step by step approach never fails.

### 3. Serious illness insurance

- a. Life is unpredictable. Both men and women have a high risk of being seriously ill as an adult. In those moments, you want to be prepared.

Conquer Life's Biggest Challenges: Get the ultimate protection against serious illnesses.

- b. Serious illness insurance is an important if not an essential asset to ensure your financial security.

Serious illness insurance provides a lump sum payment after a pre-established survival period.

Imagine being able to receive medical care quickly if you were seriously ill! That would take a load off you and your loved ones. Stress is the last thing you want to feel in those situations.

Serious illness insurance could also allow you to fulfill, with your loved ones, a project you hold dear[I need to know how]. This insurance covers 85% of serious illnesses, including cancer, heart attack, and stroke.

We, at SFR, understand that this can be complicated but our specialized advisor will devote all his attention to helping you with this type of coverage.

Find out more on how our coverage can help you focus on recovery without financial stress.

### 4. Investments

- a. Worried about achieving your financial goals? Well, your concern is justifiable without SFR in your corner.

Join us and Let your investments grow. Our philosophy: healthy returns while managing risks.

Discover how you can transform your financial landscape and multiply your wealth.

- b. Your projects are very close to our hearts. SFR makes it a mission to make your investments a success.

You've been told the whole time that RRSPs are an option. Well, it is the common one.

But will it grant you financial independence? If yes, how much time will it take?

Needless to say that you can't wait a lifetime and neither should you.

Now, you are confused because you know traditional routes are not the best. You might be thinking, are getting good returns from guaranteed investments possible?

Our track record screams YES!

Our cabinet has been a member in good standing of the Autorité des marchés financiers for about 20 years. Services Financiers Rioux's founder is registered under 4270878 Canada Inc.

There are other products that are better suited to meeting your financial goals.

“Very often, we are unaware of the goldmine we’re sitting on. You’re an outdoors sort of person? You’re thinking of buying some land? You’re handy, with time to spare? Invest in real estate!” – Jean-Sébastien Rioux

For example, we recommend segregated funds. A type of investment that will guarantee your initial investment if not more, unlike mutual funds.

This plays into our simple yet smart philosophy:

*Get healthy returns while managing risks.*

Simple logic suggests that there is **no downside**.

We are here to listen and offer sound advice with only one thing in mind: offer you investment options that fit your expectations and meet your needs. That is our ultimate goal.

We should however warn you! ...This will only happen if you let us know you.

We will take the time to sit down with you and discuss your financial situation, your projects, and your financial goals.

‘Is it possible if I don't like to take risks?’ Of course, it is.

Both the bold and the cautious will find their match

Still not convinced? Here is the unbeatable system SFR use with your permission:

So that you can take advantage of the best returns while protecting your assets, we offer you:

- *Regular feedback on your investments* – Keep your enemies close but your investments closer - Get personalized reports to see firsthand how your financial decisions are fueling your dreams..
- *Ultimate Control Over Your Wealth* – Imagine having the freedom to adjust your investment strategy on the fly. With our service, change your investments as your life evolves—no waiting, no hassle.
- *Sleep Soundly with Capital Guarantees* – Secure your future with investments that promise to protect your capital. Find out how our exclusive access to segregated funds can shield your money from market volatilities
- *Maximize Your Savings, Not Your Tax Bill* – Learn the secrets to using a TFSA to grow your wealth tax-free! We show you how to legally shield your gains from taxes and maximize your financial growth.

What we owe you is results, and on that we never fail.

## The process

### 1. Getting to know you

On our first conversation, we would love to help you determine what you want with your one wild and precious life.

### 2. Finding the best way to achieve your financial goals

Now that you know where you want to go, how will you get there? We pave the way and walk with you every step of the way to ensure your financial life is on track.

### 3. Regular feedback until you get there and beyond.

Imagine having a financial expert in your corner, providing constant updates and strategic advice at every turn.

Discover how our continuous feedback loop can keep you on track to not only reach your financial targets but to surpass them.

## The expert.

You have 32 years of experience at your disposal to pursue financial freedom and protect your estate.

SFR has been for nearly three decades offering tailor-made solutions to get you to your financial goals.

We can implement a whole range of protective measures through the best insurance companies.

We have done it for countless others and we can certainly do it for you.

Our clients range from new investors, business owners to key executives, professionals, and those with significant wealth.

Regardless of your financial picture's complexity or uniqueness, we're ready and equipped to help you.

Our mission is **[fill this part]**

From our offices in the Outaouais, we serve all of Quebec and Ontario.

Our clients expect financial advice with their best interests in mind.

Our expert is more than ready to deliver.