The Lead Lifecycle Framework

Introduction

Lead Gen Gets You in the Game. Follow-Up Wins It.

Generating leads is critical for growth. But it's what happens after the lead comes in that determines your ROI.

The best-performing firms don't just chase more leads. They build systems that move prospects through the funnel—from first interaction to loyal client.

This guide includes:

- A visual framework for the full lead lifecycle
- Clear breakdowns of each stage: what it is, where it happens, and where firms often lose momentum
- A personalized assessment to uncover hidden gaps in your process

Because it's not just about generating leads. It's about *moving them.*

Why This Matters Now

The Cost of an Incomplete System

If you're investing in lead gen but still not seeing consistent growth, you're not alone. Here's the problem:

- **96%** of leads aren't ready to buy right away (Marketo)
- It takes **6–8+ touches** just to start a meaningful conversation (Salesforce)
- Most advisors give up after just 1–2 touches

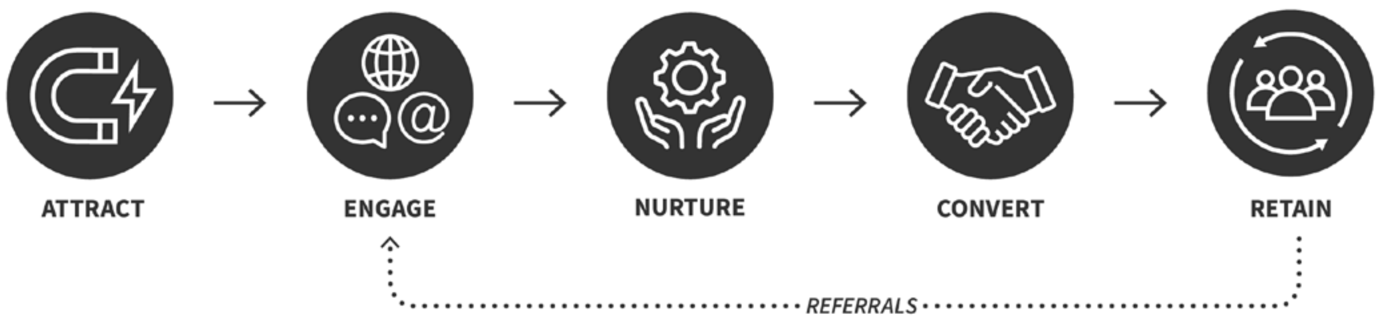
That gap adds up. When you don't have a structured system to follow up, nurture, and convert, you're not just losing leads—you're wasting time, budget, and opportunity.

Even small improvements in follow-up can lead to substantial gains.

The Framework

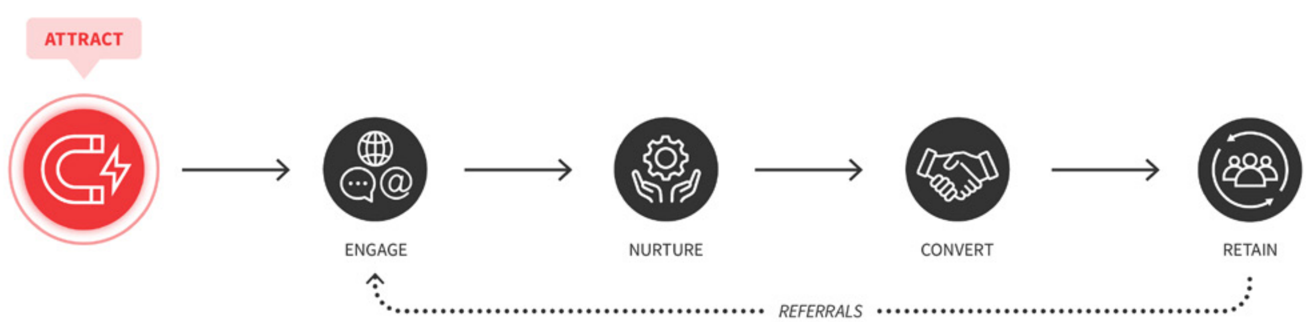
The Lead Lifecycle Framework

The Lead Lifecycle is made up of five critical phases. Each one plays a distinct role in moving a prospect from interest to commitment.



Phase-by-Phase Breakdown

Understanding Each Phase



1. Attract

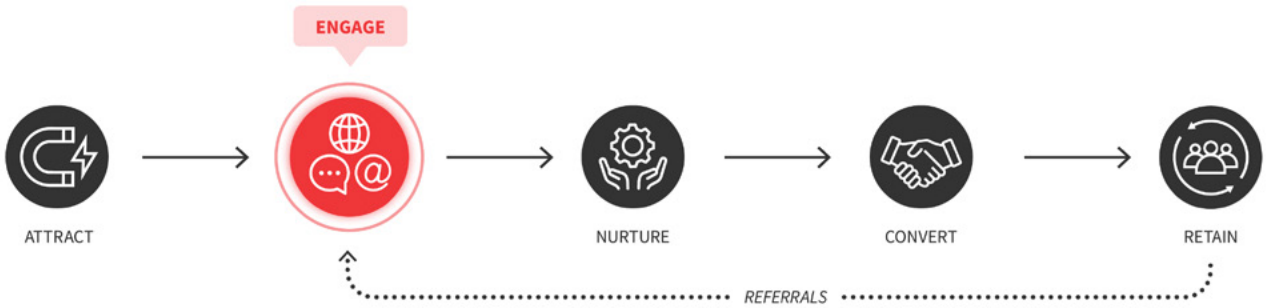
Draw the right prospects into your orbit.

Where it happens:

Social media, SEO, paid ads, events, referrals

Common breakdowns:

- Broad or unclear targeting
- No lead qualification
- Weak or inconsistent brand presence



2. Engage

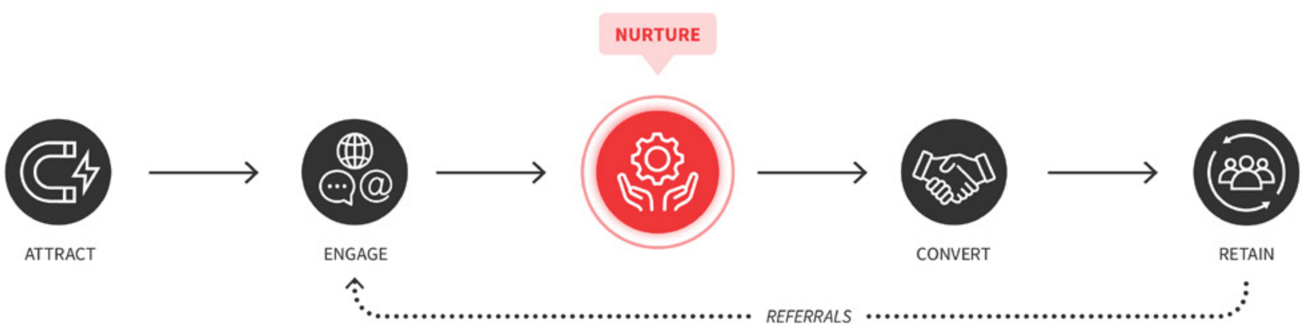
Make a strong first impression and prompt action.

Where it happens:

Landing pages, lead magnets, opt-ins, welcome emails

Common breakdowns:

- No immediate follow-up
- Generic messaging
- Missed early signals of interest



3.Nurture

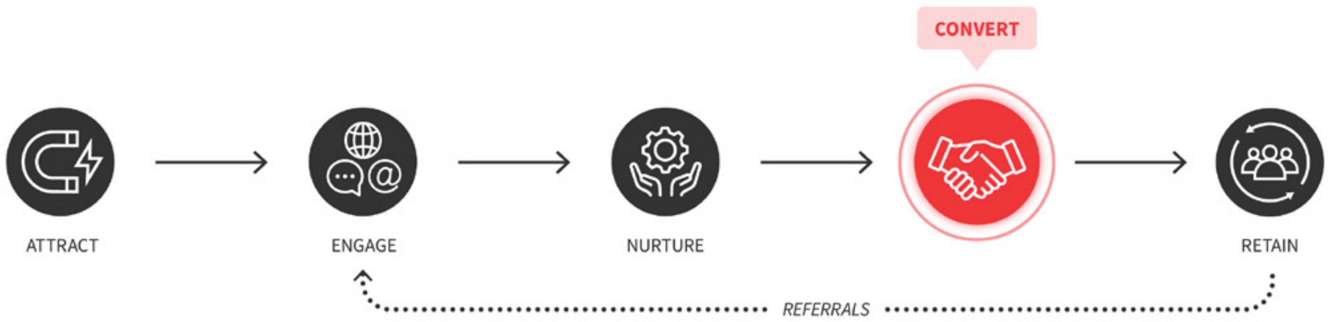
Build trust with consistent, relevant value.

Where it happens:

Email, SMS, webinars, social content, retargeting

Common breakdowns:

- Inconsistent cadence
- One-size-fits-all drips
- No behavioral segmentation



4. Convert

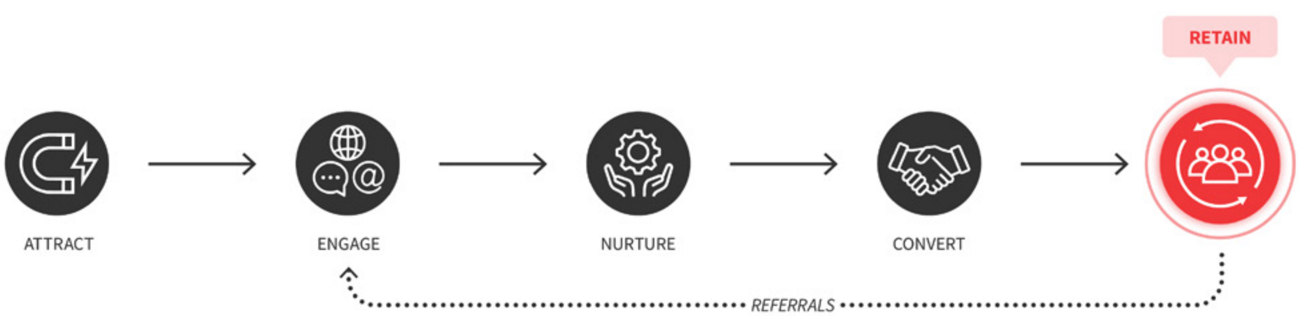
Move warm leads to action.

Where it happens:

Personal outreach, meetings, call scheduling

Common breakdowns:

- Poor timing
- Advisors miss buying signals
- No clear CTA or conversion trigger



5. Retain

Turn clients into loyal advocates.

Where it happens:

Email, events, client reviews, referral campaigns

Common breakdowns:

- Post-onboarding communication drops off
- No system for referrals
- Clients disengage over time

Why the Buyer Has Changed

Today's Prospects Don't Wait to Be Sold

Modern advice-seekers behave very differently than they did even a few years ago:

- **They're self-directed.** According to 6sense, **70% of the buyer journey happens before they ever reach out.**
- **They expect content.** Not just information, but personalized, educational content that helps them make confident decisions.
- **They're silently comparing firms**. Long before a prospect books a meeting, they're evaluating websites, social media, and marketing materials behind the scenes.

And even referrals—once seen as the most reliable growth channel—have evolved.

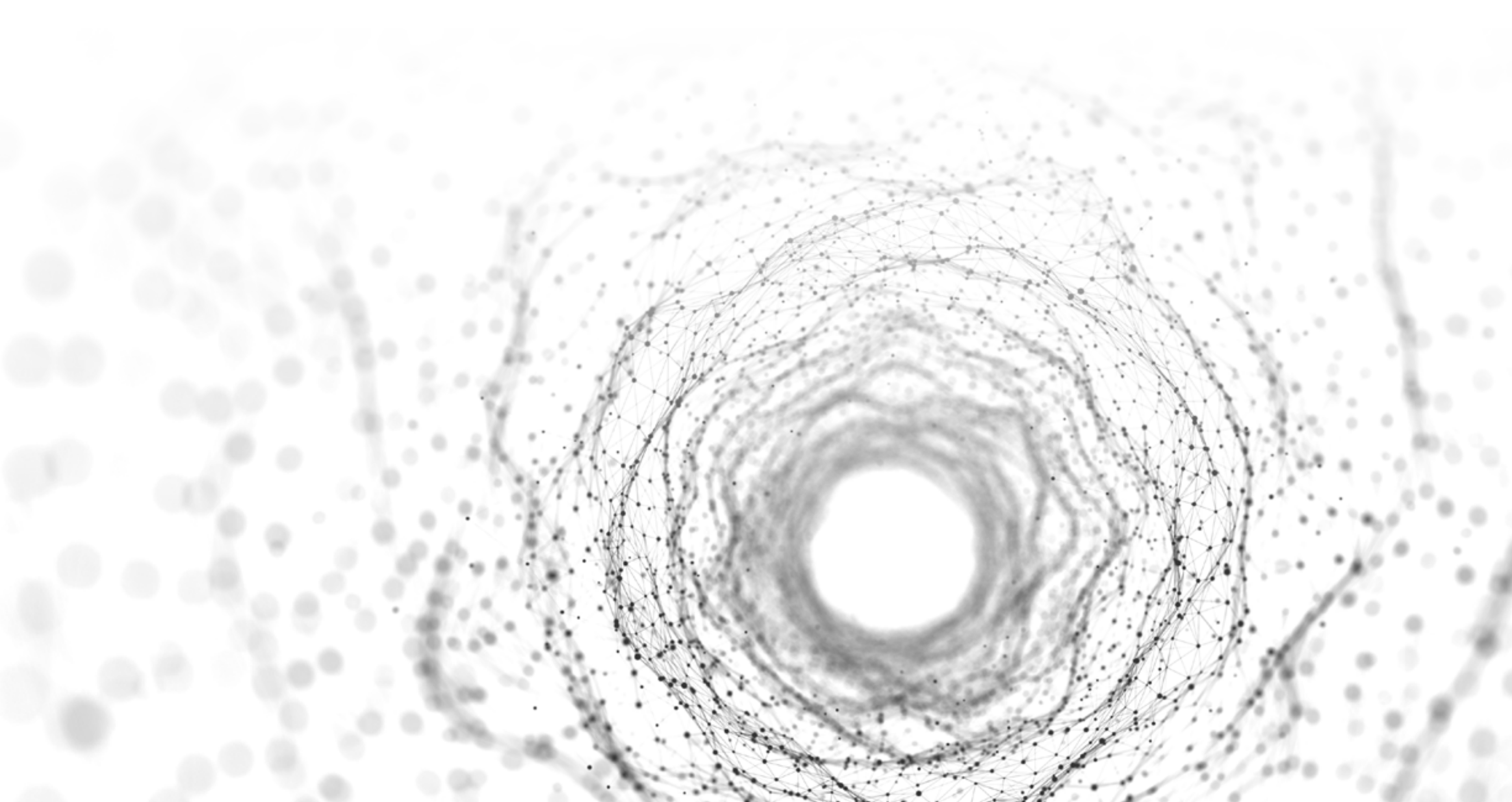
According to Ficomm:

- **Only 29%** of clients say they require a referral to hire an advisor
- **45%** of clients say they hired based on digital marketing
- Among buyers under 44, the shift is even more dramatic:
  - ◊ Only **17%** say they require a referral
  - ◊ **57%** hired based on digital marketing

The takeaway?

Even when a referral brings someone to your door, **your digital presence is doing the heavy lifting.** Prospects are researching you—silently reaffirming whether you're the right fit—long before the first conversation.

Referrals start relationships. Marketing wins them.



Where Firms Lose Momentum

The Leaky Pipeline

Without a system, even the best marketing leaks opportunity:

- **Attract → Engage:** Leads captured but not followed up
- **Engage → Nurture:** No relevant content to reinforce interest
- **Nurture → Convert:** No advisor handoff, or poor timing
- **Convert → Retain:** No structured post-onboarding follow-up

Ask yourself:

- Is your follow-up timely?
- Are you prioritizing the right leads?
- Can your team see what's working across the funnel?

Small gaps at each stage create massive lost potential.

What Top Firms Do Differently

Systematized Growth = Sustainable Growth

According to Schwab:

- Top-performing firms (12.2% growth vs 4.9% avg) are:
  - ◊ **50%** more likely to have a documented marketing strategy
  - ◊ **40%** more likely to have a documented value proposition
  - ◊ **30%** more likely to use defined client personas

These firms aren't growing by accident. They're investing in:

- Documented workflows
- Aligned messaging across every touchpoint
- Tools and automation that carry leads from start to finish

Take the 2-minute Assessment

Where Is Your System Leaking Leads?

Take our 2-minute, interactive assessment to uncover:

- The weakest points in your lead nurturing system
- How your process compares to other firms
- Quick, practical changes to improve your results

It's fast. It's actually helpful. And it's hosted by our AI agent—because we wanted to make it easy, fun, and frictionless.

Start the 2-minute Conversation

Final Takeaway

Lead Gen Fills Your CRM. A System Fills Your Pipeline.

You don't need to chase more leads. You need a system to carry the ones you already have through the full client journey.

The firms winning right now are:

- Nurturing smarter
- Following up longer
- Building systems that convert

Want to be one of them? Start by mapping your gaps. Then start fixing them.

Looking to Bring the Lifecycle to Life?

We built Snappy Kraken to do exactly what this guide outlines: **Attract, engage, nurture, convert, and retain—at scale, from one platform.**

If you're ready to turn insights into action, we can show you how leading firms are using Snappy Kraken to:

- Launch fully automated campaigns across the entire lifecycle
- Identify high-intent leads without manual tracking
- Strengthen advisor follow-up with less internal effort

Your CRM is full of opportunity. Let's help you turn it into more booked meetings and clients.

See How It Works