

MARKETING CHANNEL STRATEGY & TIMELINE

6 Channels | 7 Technology Resources | Q1-Q4 2026 Roadmap

The strategic plan behind LEAD Advisors' growth engine.
Building a scalable, multi-channel marketing system
to reach construction and B2B leaders nationwide.

THE SIX-CHANNEL APPROACH

01	Conference Intelligence	Q1 Build	Identify, prep, and follow up on key industry conferences with systematic ROI tracking
02	Lead Vetting & Qualification	Q1 Build	AI-powered 25-point scoring and enrichment before leads reach sales
03	Current Outbound Optimization	Q1 Build	Better templates, A/B testing, and analytics for ZoomInfo/Apollo/LinkedIn
04	LinkedIn to Webinar	Q1-Q2 Build	Content marketing driving LinkedIn audience to webinars and lead magnets
05	Social to Four-Fires Community	Q2 Build	Community building around the Four-Fires philosophy through events and social
06	Pastor Email & Faith Outreach	Q3 Build	Relationship building with faith leaders connected to business communities

01

Conference Intelligence & Networking

Q1 Build & Optimize

- Build calendar of target conferences for LEAD
- Identify high-value attendees expected at each event
- Pre-populate prospect research and talking points
- Create pre-conference outreach sequences
- Systematic post-conference follow-up with CRM tracking
- Track ROI by conference

Expected Impact: 30% improvement in conference ROI, pre-scheduled meetings vs. random booth interactions

02

Lead Vetting & Qualification

Q1 Build | Q2 Optimize

- Score all leads using 25-point system within 24 hours
- AI enrichment with company data, growth signals, cultural fit indicators
- Admin review layer for verification
- P1/P2 routed immediately to sales
- P3 goes to nurture sequence
- Below 10 points = monitor only

Expected Impact: Higher conversion rate — Steve only talks to qualified prospects

03

Current Outbound Optimization

Q1 Build | Q2 Optimize

- Better templates and messaging (trigger-based)
- A/B testing of subject lines and approaches
- Improved follow-up sequences and cadence
- Better tracking and analytics in Pipedrive
- Weekly/monthly performance reviews

Expected Impact: Higher response and open rates, more consistent lead volume

04

LinkedIn to Webinar / Content Funnel

Q1-Q2 Build | Q3 Optimize

- Content calendar for Alan and Steve (LinkedIn posts, articles)
- Topics aligned to prospect pain points (leadership, culture, Four-Fires)
- Develop webinar topic and format
- Lead magnet creation (ebook, assessment, guide)
- Conversion of engaged audience into sales calls

Content Themes: Construction leadership, management development, Four-Fires philosophy, founder succession, building healthy teams

Expected Impact: Inbound interest, thought leadership positioning, pre-qualified leads

05 **Social to Four-Fires Community**

Q2 Build | Q3 Optimize

- Engage with faith-based business communities
- Build Four-Fires community resources
- Host webinars or events for values-driven leaders
- Partner with values-aligned organizations
- Leverage The Four-Fires Tribe

Expected Impact: Deepened brand, strong values-aligned pipeline, referral network

06 **Pastor Email & Faith Community Outreach**

Q3 Build | Q4 Optimize

- Identify target pastors in construction/B2B communities
- Develop relationship-first outreach approach
- Build thought leadership content for faith leaders
- Create referral partnership model

Expected Impact: Warm inbound leads from trusted sources, brand awareness in faith community

BUILD & OPTIMIZE TIMELINE

Channel	Q1	Q2	Q3	Q4
Conference Intel	Build & Optimize	—	—	—
Lead Vetting	Build	Optimize	—	—
Current Outbound	Build	Optimize	—	—
LinkedIn to Webinar	Build	Optimize	Optimize	—
Social to Four Fires	—	Build	Optimize	—
Pastor Email/Social	—	—	Build	Optimize

TECHNOLOGY RESOURCE TIMELINE

Resource	Q1	Q2	Q3	Q4
Writing Agent	Build & Optimize	—	—	—
Conference Agent	Build & Optimize	—	—	—
Lead Enrichment	Build & Optimize	—	—	—
Lead Scoring	Build	Optimize	—	—
CRM Development	Build	Build	Optimize	—
System Integration	—	Build	Build	Optimize
Automation	—	—	Build	Optimize

TARGET METRICS

Steady-state performance targets once all channels are operational

40-50

New Leads
per Month

8-10

P1 Leads
per Month

12-15

P2 Leads
per Month

15-20%

Outreach
Response Rate

30-40%

Discovery Call
Rate

50-60%

Proposal
Rate

50-60%

Close
Rate

\$500-750K

Pipeline Value
Target

MONTHLY CLOSED REVENUE TARGET

\$50K - \$75K

READY TO BUILD

This strategy is designed to scale with LEAD Advisors.
Each channel builds on the last. Each quarter compounds the one before it.



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