

Growth Action Plan

NorthBridge Wealth Advisors | Landing Pages

Lead: Adrian Chen | Primary Goal: More qualified leads

Industry: Financial Services

Team Size: 9 staff

Traffic/Users: ~4,700 monthly visits; 110 consultation requests

Expected first measurable gains: 2-6 weeks

1) Executive Summary

- Likely bottleneck: Generalist messaging attracts broad but low-fit inquiries.
- Fastest path: Create niche-focused landing pages by client segment
- Expected impact: Increase qualified call mix 15-20% (High confidence).
- Context: Website traffic is steady from referrals and SEO, but discovery calls include many low-fit prospects.

2) Opportunity Diagnosis

- Primary: Generalist messaging attracts broad but low-fit inquiries.
- Secondary: No clear page path by client type or investable assets.
- Assumption: Assumes ideal client profile is already defined.

3) 30-60-90 Plan (Outcome-Based)

Window	Focus	Action	Impact	Confidence
0-30 days	Positioning	Create niche-focused landing pages by client segment	Increase qualified call mix 15-20%	High confidence
31-60 days	Trust	Add compliance-safe authority proof and process clarity	Improve call-to-proposal rate	Medium confidence
61-90 days	Optimization	Test CTA phrasing for fit-first vs urgency-first	Higher meeting show rate	Exploratory

4) Top 5 Priority Actions

1. Build a page specifically for your top client segment.
2. Use qualification framing before scheduling CTA.
3. Include transparent process timeline and outcomes.
4. Add fit-check form field to reduce low-intent bookings.
5. Instrument source-to-qualified-call analytics.

Projected KPI Direction (30/60/90)



5) Offer Recommendation + KPI Scorecard

Recommended: Landing Pages (Primary). Track weekly: Qualified call ratio, show-up rate, proposal conversion.

6) Risks & Mitigation

- Risk: Compliance copy constraints. Mitigation: pre-approved content blocks.
- Risk: Too narrow messaging. Mitigation: maintain broad page as backup.
- Risk: Attribution gaps. Mitigation: enforce UTM standards.

7) Immediate Next Step

Publish one segment-specific page with fit-check CTA and monitor qualified call rate for the next 3 weeks.

"If useful, I can turn this into a hands-on execution sprint with milestones, owners, and delivery dates."

Book a strategy call: <https://nexgen.studio/#contact>

Site: <https://nexgen.studio>