



SAMPLE STRATEGY ROADMAP · FINANCIAL PLANNING

Where Video Fits in Your Sales Process

A short map of how Ardith wins clients today, where trust breaks down, and where video makes the whole thing faster. Yours to use — whether we build it together or you run with it.

Built for Peter Ardith · Ardith Financial Partners

SAMPLE · Ardith Financial Partners is a fictional company created to demonstrate this format.
Video for the Sales Process
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SECTION 1 · YOUR SALES PROCESS

Your sales process, mapped

How a household goes from never having heard of Ardith to a signed plan — in your words. Fee-only planning firm, four staff, no product sales, clients mostly within twenty years of retiring.

Stage	What happens here
1. Somebody finally decides to deal with it	Usually triggered by an event, not an ambition: a layoff, an inheritance, a diagnosis, a divorce, or a birthday ending in zero. “Nobody calls a planner because things are going well.”
2. They research quietly — for a long time	Months, sometimes years, of reading the website and not booking. Peter can see it in the analytics: repeat visitors who never fill in the form. “They circle for a year before they call.”
3. The intake call	Thirty minutes, free. Mostly spent making it safe — establishing that the firm is fee-only, sells nothing, and isn't going to judge what it finds.
4. The planning engagement	Six to ten weeks. Full picture, written plan, recommendations. Almost always involves both spouses, who frequently do not agree with each other.
5. Ongoing advice	Annual reviews and life-event check-ins. Clients stay a very long time — the average relationship is over eleven years.

Where clients come from	The real bottleneck	How long they stay
Existing client referrals and organic search. Almost no paid acquisition.	The months of silent research before anyone books.	Eleven years on average — the economics are entirely about getting them to start.

SECTION 2 · WHERE TRUST BREAKS DOWN

Where trust breaks down

The friction here isn't about Ardith's credibility — prospects already believe the firm is competent. It's about what they believe about themselves. (In Peter's words.)

#	Friction point	What it costs you
1	Shame keeps people from booking at all. The households who need planning most are the ones most embarrassed to show anyone their finances. They imagine being lectured about a line of credit or an empty RRSP. "People think they have to get their affairs in order <i>before</i> they're allowed to come see us. That's exactly backwards, and it costs us years of someone's life."	This is the expensive one, and it's invisible. It doesn't show up as a lost deal — it shows up as a call that never happens. The people circling the website for a year are the ones with the most to gain and the most to be embarrassed about.
2	Spouses arrive disagreeing, and one of them was dragged. Often one partner has been worrying alone for years and the other thinks it's unnecessary. The reluctant spouse experiences the first meeting as an ambush.	Engagements stall or never start, not because the plan is wrong but because the household never reached agreement that it was needed. Peter has to do couples work before he can do planning work.
3	"Fee-only" is a meaningless phrase to the people who most need to hear it. The distinction that defines the entire firm — no commissions, no products, no incentive to sell anything — is industry vocabulary. Prospects assume every advisor says something similar.	The firm's single strongest differentiator does not land. Prospects arrive braced for a sales pitch and spend the first meeting waiting for one.
4	They expect to be told they're behind. Most people arrive assuming the answer will be "you should have started fifteen years ago," so they avoid asking.	Avoidance compounds. Every year of delay makes the conversation feel more shameful and the eventual plan harder to build.

People think they have to get their affairs in order before they're allowed to come see us. That's exactly backwards — and it costs them years.

— Peter, on the clients who never call

SECTION 3 · WHERE VIDEO FITS

Where video fits

Each friction, matched to the piece that solves it. Note that none of these are about proving competence — prospects already assume it. They're about removing judgment and making it safe to start.

A note on compliance: everything below is built inside the regulatory rules that apply to the firm. Scripts go through compliance review before filming, and nothing in these pieces constitutes advice or projects a specific outcome — which suits the approach anyway, since the goal is permission to start rather than persuasion.

Friction point	Video that solves it	What changes
Shame keeps people from booking at all.	The Permission Film. Peter, plainly, on the thing he says on nearly every intake call: you do not need to have it sorted out before you come. The messiest files are the most normal ones. Nobody here is going to be surprised or disappointed by what you bring in.	The foundation piece, and the one tied to revenue you can't currently see. It works on the website visitor who has been circling for eleven months. Lowering the cost of the first call is worth more than any improvement to closing.
Spouses arrive disagreeing; one of them was dragged.	The Both-Of-You Film. Short, made to be forwarded by the worried spouse to the reluctant one. Speaks to the skeptic directly and respectfully — what this is, what it isn't, why it's not an accusation.	The household arrives having already had the argument, rather than having it in Peter's office. Engagements start from agreement instead of resentment.
"Fee-only" doesn't land. They expect a sales pitch.	A short explainer on what fee-only actually means, in plain language: how the firm is paid, what it does not sell, and why that changes the advice.	The differentiator finally lands with the people it was meant for. Prospects stop waiting for the pitch and start participating in the first meeting.

What's deliberately absent: no client-story or testimonial film. In a firm where clients are ashamed of their finances, asking them to appear on camera about them is the wrong request — and a polished success story would reinforce the exact fear that keeps people from booking.

SECTION 4 · THE ROADMAP

The roadmap

The order that makes each piece pay off.

#	Phase	What happens
1	The Permission Film	The foundation piece. Built first because it addresses the friction that gates everything — the call that never gets made. Tone matters more than production value here; it has to feel like Peter, not like an advertisement.
2	The Both-Of-You Film	Built second and cut from the same session. Its job is to be forwarded between spouses, so it has to work when watched alone, by someone who is skeptical and slightly annoyed.
3	The fee-only explainer	Third, and the simplest of the three. Low production burden once the first two have established the visual language.
4	Put them to work	Permission Film on the homepage and, critically, in the booking flow itself — where hesitation actually happens. Both-Of-You in the confirmation email so it can be forwarded before the meeting. Explainer on the site and in intake follow-ups.
5	See what changed	Compare against the baseline below after a few weeks of real use, then a 90-day measurement check-in.

Sequencing matters more than volume — the Permission Film feeds everything that follows, because none of the rest matters if they never book.

SECTION 5 · MEASUREMENT

How we'll know it worked

A simple before-and-after, so the work proves itself. Light — 2 to 4 markers. Note the first one is unusual: it measures a call that currently isn't happening.

Marker	Baseline now	A few weeks in
Intake calls booked per month	[to capture on our call]	
Repeat website visitors who never book	[pull from analytics]	
Intake calls where both spouses attend willingly	[note on next ten]	
"How long were you thinking about calling before you did?"	Ask every new client. This one question will tell you more than the rest combined.	

YOUR NEXT MOVE

Start with the call that never happens

Pick the one friction point costing you the most and start there — for Ardith, that's the **Permission Film**. It's an unusual recommendation because the revenue it protects is invisible: you cannot count the people who read the site for a year and never called. But you know they exist, you can see them in the analytics, and they are the households with the most to gain from the work.

The economics here are unlike most businesses I map. An eleven-year average relationship means almost the entire value of a client is decided by whether they ever make the first call. Improving your closing would move a small number. Lowering the emotional cost of booking moves the number that matters.

One thing worth protecting in the build: this film cannot look like advertising. The moment it feels polished or persuasive, it triggers the exact defensiveness it's meant to disarm. Plain, quiet and honest will outperform anything slicker.

If you'd like a hand building it and putting it to work, that's exactly what I do — but either way, you now have the map.

LINES TO BUILD THE STORY AROUND

In a real engagement this section holds the client's own phrases from the discovery call — the rawest, truest voice for the films. Illustrative:

- “People think they have to get their affairs in order before they're allowed to come see us.”
- “Nobody calls a planner because things are going well.”
- “They circle for a year before they call. Sometimes longer.”
- “One of them has been worrying alone, and the other thinks this is a waste of an afternoon.”
- “We don't sell anything. Saying that out loud doesn't seem to mean much to people.”

About this document. Ardith Financial Partners is a fictional company. The sales process, friction points and quotes are composites written to illustrate the structure of a Video Sales Roadmap — they do not describe any real client. The methodology, sequencing logic and measurement approach are the ones Jordan Creative Media uses in live engagements.