

From Learning on the Fly to a Playbook for Winning and Keeping Clients

CLIENT

An independent financial advisor about a year into a new role, building his client list around nurses.

THE PATH

STEP 1 · DIAGNOSTIC

ProfitPath™

Showed his real competition was whoever had his prospects’ ear, and that he already sold trust-first.

STEP 2 · MAP

PathFinder™

Put his services in order as five tiers, so every client has a starting point and a next step.

STEP 3 · PATH TO YES

ConvertPath™

Built his pitch, routing script, responses to common obstacles and referral moments.

EXIT

[Confirm]

[What he chose after the walkthrough]

THE SHORT VERSION

BEFORE

A financial advisor new to the field had picked a niche but had no pitch or path to turn it into clients.

DURING

The diagnostic showed his real competition was whoever had his prospects’ ear, and that he already had a trust-first approach he’d never named.

AFTER

He left with a playbook covering the pitch, five client pathways, 14 milestones and a plan for turning clients into referral sources.

Before, During, After

BEFORE

Where he started

- New to advisory work after a decade in client-facing finance, learning on the fly while building his own client list.
- Had just picked nurses as his niche, but hadn't yet turned that choice into a pitch or a path to clients.
- Wanted more appointments from LinkedIn and Alignable. His firm offered everything from budgeting to group retirement plans, with no clear starting point or next step.
- Warm conversations were going quiet, and he was spending weeks on contacts who were never going to become clients.

DURING

What the work surfaced

- His real competition wasn't other advisors. It was whoever had the prospect's ear, plus the pull of doing nothing.
- He already had a trust-first way of selling from his earlier career, but had never named it or turned it into a system.
- His services were put in order as tiers, so every client has a starting point and a next step.
- His niche was widened: nurses split into two segments with different pressures, and a new audience surfaced in portfolio and fractional careers.

AFTER

What he walked away with

- Authority in his niche: an opening conversation, value propositions by segment, a core message and responses to four nurse-specific objections.
- A pitch and routing script: 18 first-conversation questions and a three-option offer that keeps "not right now" prospects in his pipeline.
- A path from first service to recurring relationship: five tiers and five client pathways with milestones.
- A system for earning the right to stay: eight trust layers, responses to 18 obstacle patterns and three referral moments.
- A LinkedIn and Alignable plan for bringing in the appointments.

MEASURED AT DELIVERY

By the Numbers

1 → 5

Audience segments from a single niche

5

Service tiers, each mapped as an entry point

5

Client pathways, with 14 milestones

18

Obstacle patterns, each with a response

3

Moments that turn clients into referral sources

WHAT MADE THE DIFFERENCE

He came in asking for more appointments. What he was missing was the path after the appointment. The diagnostic showed him he already had a trust-first approach and a niche to use it on.

PathFinder™ named what was already there, and **ConvertPath™** turned it into a pitch, milestones and next steps that earn the next conversation.

Measured at delivery: what was surfaced and what the client walked away with. No post-delivery results are claimed. [More case studies: seanmatkinson.com/case-studies](https://seanmatkinson.com/case-studies)