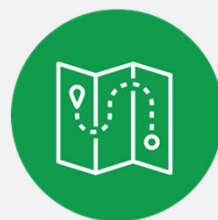




Designing a Lead Conversion Process That Aligns with How Prospects Actually Buy

Presented by Craig Lowder
NavSTAR Client Acquisition® System

Most lead conversion
processes are built around
what the advisor wants to
do — not what the buyer
needs.



What is ‘Lead Conversion Process Mapping’?

Today's Goal



Build a repeatable, buyer-aligned lead conversion process that:

- A. Mirrors how your clients make decisions**
- B. Helps you stay in sync with each opportunity**
- C. Improves conversion without being pushy**

The Six Stars

NavSTAR Client Acquisition® System

Targeting

Focus on prospects that are right-fit for you.



Messaging

Develop messages that resonate deeply with your target audience.



Lead Conversion Process Mapping

Map out the journey from lead to client and optimize your client acquisition process for peak efficiency and effectiveness.



Business Development Success Scorecard

Measure your progress and fine-tune your system with precise metrics.



Lead Generation

Attract a regular flow of potential right-fit clients.



Feed the Funnel

Nurture leads to ensure a continuous stream of new right-fit clients.



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What is ‘Process Mapping’?



Lead Conversion Process Mapping =
identifying and documenting the most direct
path from interest to purchase, mirroring
the client/customer “buying journey”.

Why Map (or Document) the Process?

Why Map the Process?



**Gain visibility
into what's
working and
what's not**

**Spot
bottlenecks
and hesitations**

**Help prospects
feel guided,
not rushed**

The Buying Journey Has Changed in 2025

The Buying Journey has Changed



More stakeholders involved.

Longer sales/buying cycles.

More personal touchpoints.

3 Phases of a Buyer-Aligned Process



Awareness:
They realize they
have a problem

Consideration:
They identify &
compare
solutions

Decision:
They choose
who to trust



Case Study: Tim

Commercial Real Estate Broker

Annual Impact	Before	After	% Change
Qualified Leads	19	32	↑ 68%
Lead Conversion Rate	37%	66%	↑ 78%
Average Contract Size	\$16,000	\$19,000	↑ 19%
Net Personal Income	\$76,000	\$291,000	↑ 283%

Map Your Current Sales Process

List the major steps you take from first contact to closed client. *Be honest.*

Now... Match Your Process to Theirs

**Where are you: Rushing them? Skipping
decision influencers? Assuming they're
ready when they're not?**

Create a Visual Map

Visuals help you track deals, onboard team members, and spot friction early.



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Email Series Swipe Files for Converting Leads

Download all Seven (7) Swipe Files



Homework

Draft a buyer-aligned version of your process.

Include how they enter awareness, what they need in consideration, and what makes them feel ready to decide.

Final Thoughts

When you align your sales process with the buyer journey, you don't have to convince — you guide.

Steps In The Customer Buying Journey Worksheet

Customer Buying Journey



Interest

SAMPLE BUYING JOURNEY

1. Research ABC COMPANY
2. Do a Meet n' Greet with ABC COMPANY Leadership Team for a capability's presentation and discussion
3. ID a project for ABC COMPANY to bid
4. Add ABC COMPANY to Bidders List
5. Send ABC COMPANY RFP/Bid Request
6. Review RFP/Bid Responses
7. Narrow down Bidders to 1, 2 or maybe three Bidders
8. Interview and Negotiate with bidders still under consideration
9. Issue a Verbal Award
10. Execute an Award Agreement



Decision



**Want help building your
lead conversion process?
Get the NavSTAR Client
Acquisition® System Bundle**

Questions!