

## Case Study

# How Eric Negrón Used Asset-Map to Boost Conversion Rates by 40%

## EXECUTIVE SUMMARY

As CEO and Advisor Advocate at Forefront Wealth Partners, Eric Negrón, CEPA®, is on a mission to empower advisors and create real, tangible results for clients. Read on to learn how Negrón used Asset-Map's intuitive deliverables, hands-on training, and scalable tools to revolutionize Forefront's processes and boost conversion rates by 40% across the board.

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## THE SEARCH FOR SCALABILITY

Negrón started his career from the ground up – and he knows what it's like to be the underdog in a room full of advisors managing hundreds of millions of AUM. Now that he's in a position to help other advisors find success through Forefront Advisor Network, he's focused on building connections, confidence, and capabilities for his team through mentorship and resources.

One hurdle Negrón wanted to tackle upfront was implementing consistency and scalability across the board. The issue: Clients want clear ways to understand their financial situation, but how could Forefront find a solution that worked for each and every advisor?

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consistent while also promoting engaging conversations,” Negrón explains.

As he began his research into different tech solutions, he knew that something rooted in simplicity would work best – something that took complex financial pictures and made them digestible to his team's clients and prospects.

“If you can't explain it with a crayon and draw it out for me, you really don't know the subject well enough.”

When Negrón first saw Asset-Map's sleek, one-page deliverables, he knew he was onto something. While other tools tend to be more complicated, Asset-Map made everything simple enough to work across both clients and prospects.

## BOOTS ON THE GROUND

After realizing that Asset-Map's one-page visuals could hold the key to all his firm's answers, Negron decided to implement the software system across all of Forefront Wealth Partners.

Then, Negron decided to join the Asset-Map training program known as Boot Camp, a virtual master-class featuring Asset-Map experts.

"Boot Camp is the most undervalued training tool in the financial planning industry," Negron says. "I would have killed to sit in a room with a top producer to gain the level of insights that I get going through Asset-Map Boot Camp."

Through the training class and his use of Asset-Map, Negron realized it could demystify financial planning conversations by getting to the root of client and prospect needs – regardless of who walked through the door, or which advisor they were meeting.

Negron now sends his entire organization through Boot Camp twice a year, calling the course a "game-changer." He began implementing Asset-Map throughout Forefront, with a goal of having every single household in their system benefitting from the tool.

"There's no other tool on the market like that," Negron says. "It's straightforward and simplistic, but so powerful."

Quickly, the impact of Asset-Map became apparent – both with client satisfaction and prospecting.

## CRUSHING CONVERSION RATES WITH ASSET-MAP

With Asset-Map fully implemented across Forefront, Negron notes that the Signals™ feature, which allows advisors to be proactive by monitoring households' financial health, is

invaluable. It keeps clients in the loop and engaged throughout the year while identifying problems immediately.

"Signals gives advisors and clients a measure of financial success through six key components," Negron explains. "We look at those for every single household to scan financial health – it's allowed us to completely standardize that process."

"It shows opportunities to solve a problem, which results in more effective product placement, commission, fees and engaged clients – which leads to more introductions and referrals, higher retention and higher profitability. And I don't know a single financial planning tool that can do it so succinctly and clearly across the board for either a firm or for an enterprise."

The proof is in the (very impressive) numbers, especially on Forefront's prospecting efforts. Every single prospect receives custom Asset-Map deliverables, before ever deciding to work with Forefront.

The result? **An effective conversion rate jump of 40% since beginning to use Asset-Map in initial meeting processes.**

"A lot of advisors don't deliver much value in that first meeting," Negron says. "We walk in and we're like, 'Let's get to work.'"

## EMPOWER YOUR TEAM WITH ASSET-MAP

Ready to find consistency at scale?

## CONTACT US

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*Eric Negron, CEPA®, happened upon wealth management while working at a bank in his college years, where he realized that financial planning was the perfect combination of people, psychology and motivating people to better themselves. Armed with a desire to help people grow, he's dedicated his career to empowering advisors to deliver top-tier financial planning services to their clients. Now, as Advisor Advocate and CEO of Forefront, he's working hard to leave the world better than he found it. Outside of the office, you can catch Eric spending time with his wonderful wife and children.*

[Click here to learn more about Eric and his work at Forefront.](#)