

CASE STUDY: 001

FEDERAL RETIREMENT WEBINAR GROWTH SYSTEM

A multi-stage digital acquisition and conversion system built to move cold traffic into registered webinar attendees, post-event appointments, written business, and funded premium.

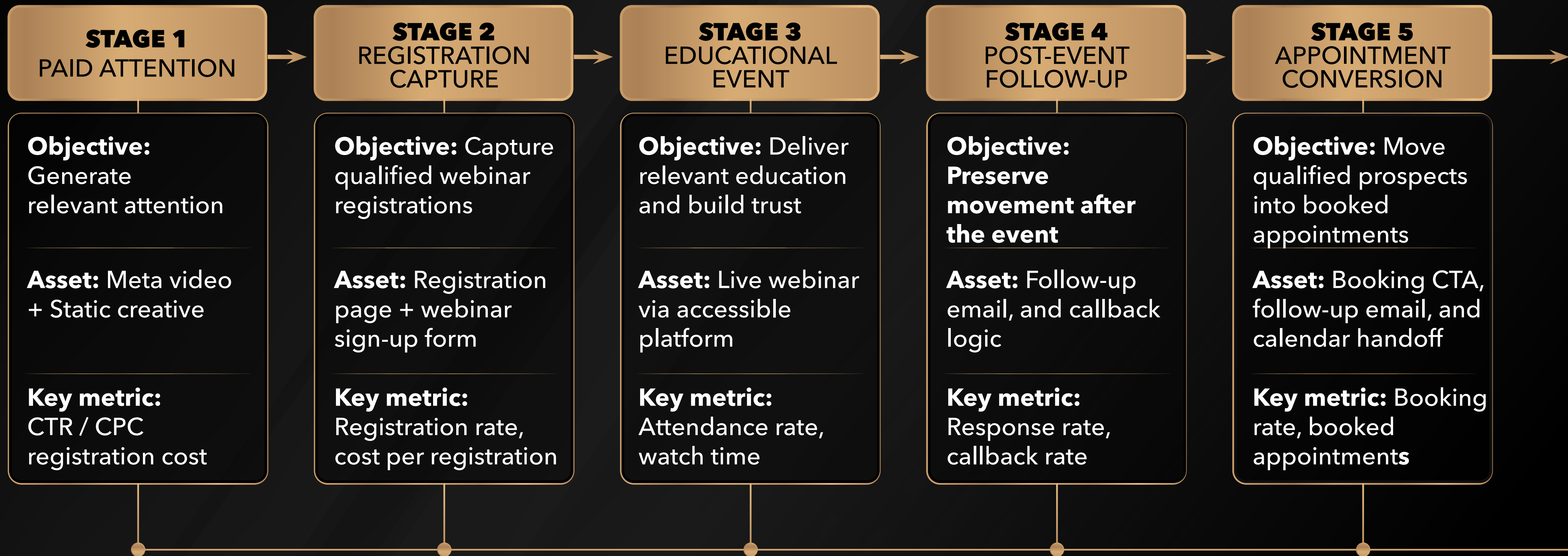
Executed under a prior advisor marketing organization.

Client and company identifiers withheld.

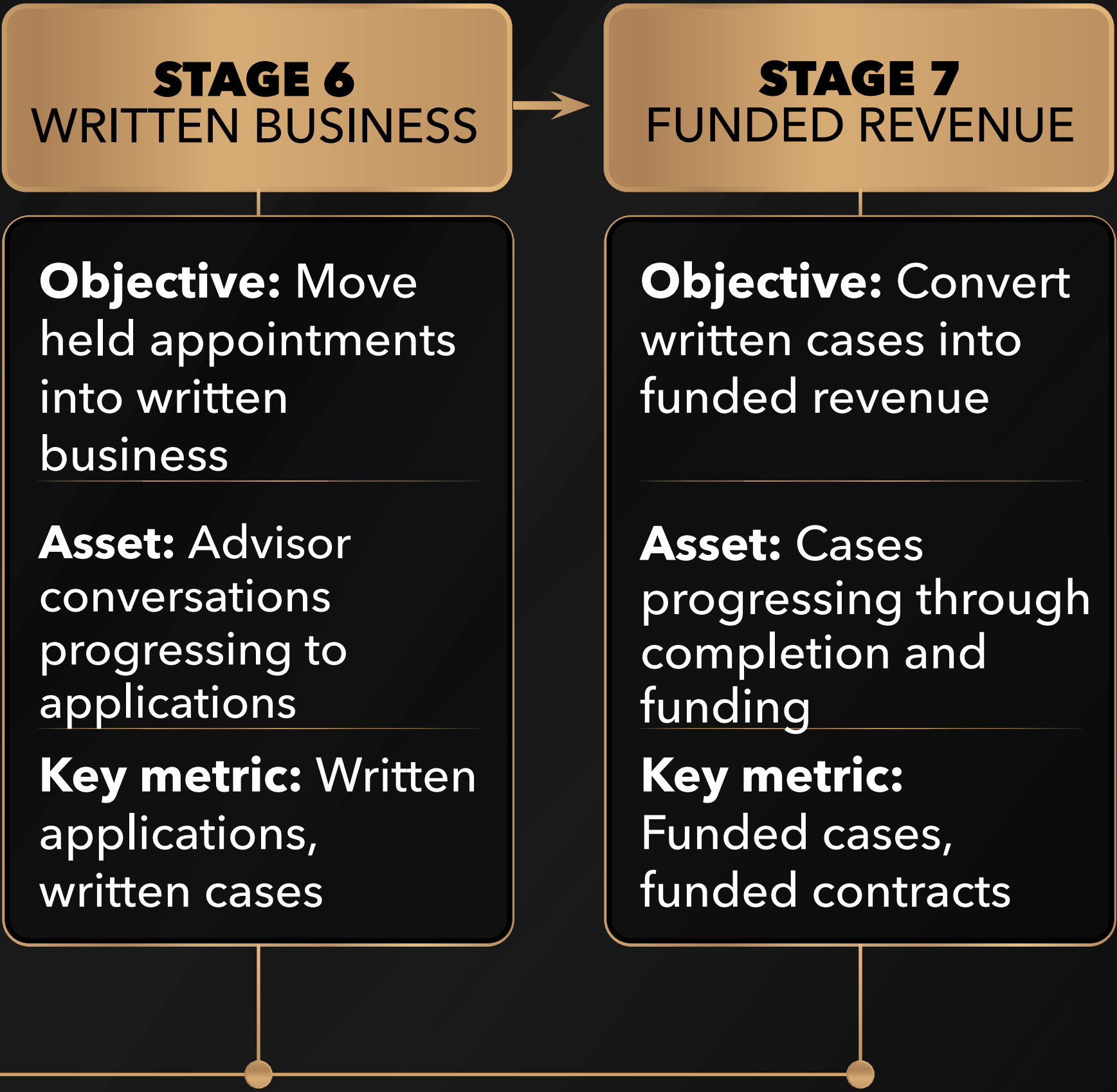
THE BUSINESS PROBLEM

1. FEDERAL EMPLOYEES FACING RETIREMENT OR BUYOUT UNCERTAINTY WERE DIFFICULT TO REACH THROUGH TRADITIONAL METHODS
2. Trust had to be built before the appointment
3. Generic financial messaging underperformed
4. Attendance and follow-up mattered as much as registration
5. Revenue did not happen at registration or attendance. It happened only if movement continued through to appointment, written business, and funding

THE SYSTEM MAP



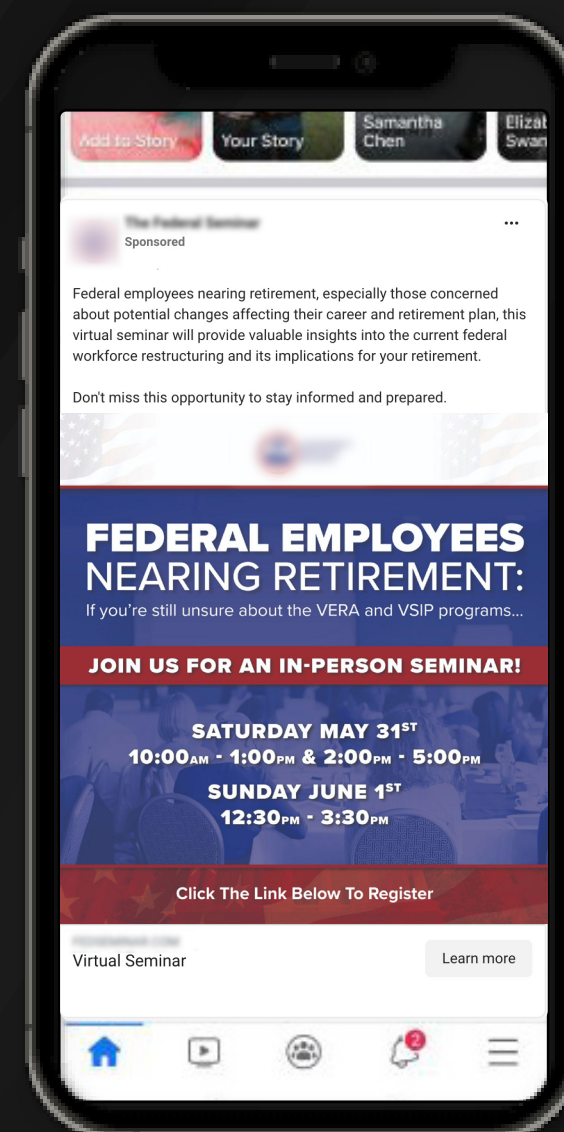
THE SYSTEM MAP



ARTIFACT 1 – META AD CREATIVE

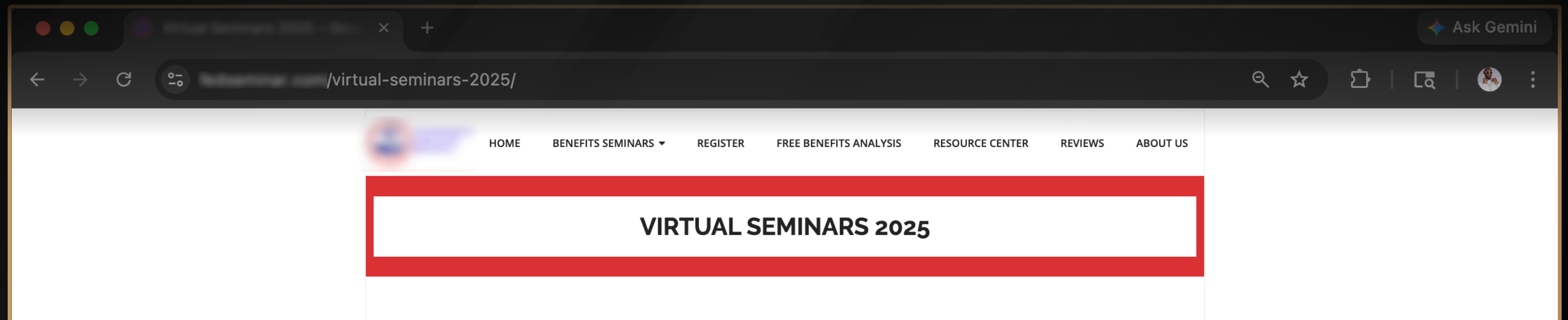
FOCUSED ON HIGH-URGENCY FEDERAL TOPICS TO CREATE IMMEDIATE RELEVANCE WITH THE TARGET AUDIENCE.

Messaging used federal workforce-specific terms and retirement-adjacent triggers to stop the scroll and improve click quality.



ARTIFACT 2 – REGISTRATION PAGE / LANDING PAGE

BUILT AROUND DATE-SPECIFIC EVENT REGISTRATION TO REDUCE CONFUSION AND IMPROVE CONVERSION INTO ATTENDANCE.



The page was structured to make the event feel immediate, specific, and easy to commit to without introducing unnecessary friction. ↓

ARTIFACT 2 – REGISTRATION PAGE / LANDING PAGE

THE FORM

The form is titled "WEBINAR REGISTRATION" and includes the following fields and options:

- Attending Virtual Session ***: Radio button selected for "1/13/2026 6pm EST".
- Name ***: Two input fields for "First" and "Last".
- Work Email ***: One input field.
- Personal Email ***: One input field.
- Mobile ***: Input field with a country dropdown (USA) and phone number "+1 201-555-0123".
- Phone ***: Input field with a country dropdown (USA) and phone number "+1 201-555-0123".
- Dept./Agency ***: One input field.
- Date of Birth ***: Three dropdown menus for "day", "month", and "year".
- Estimated Retirement Date**: Three dropdown menus for "day", "month", and "year".
- Marital Status ***: Radio buttons for "Single", "Married", "Divorced", and "Widowed".
- Retirement System**: Radio buttons for "FERS", "CSRS", "CSRS offset", and "Combination".
- Referred From ***: Radio buttons for "FACEBOOK", "INSTAGRAM", "LinkedIn", and "EMAIL".
- SUBMIT**: A blue button at the bottom.

Capture contact and confirm the higher intent of the prospect using required qualifying questions designed to improve advisor clarity

ARTIFACT 3 – WEBINAR REGISTRATION CONFIRMATION

REGISTRATION CONFIRMATION LAYER USED TO LOCK IN COMMITMENT AFTER SIGN-UP AND REDUCE DROP-OFF BETWEEN REGISTRATION AND ATTENDANCE.

This stage helped carry the prospect from sign-up into actual event intent, which mattered more than raw registration count.

ARTIFACT 4 – DELIVERY STACK

WEBINAR HOSTED THROUGH A PLATFORM SELECTED FOR RELIABILITY IN FEDERAL WORK ENVIRONMENTS WHERE FIREWALL RESTRICTIONS AFFECTED ACCESS.

Platform choice was not cosmetic. It affected deliverability, access, attendance quality, and live event continuity.

Live sessions were built to educate before the appointment, not just pitch inside the room.

ARTIFACT 5 – FOLLOW-UP LAYER

SEPARATE FOLLOW-UP LOGIC USED FOR ATTENDEES AND NO-SHOWS TO PRESERVE MOVEMENT AFTER THE EVENT.

Post-event movement was not treated as one audience. Messaging changed based on whether the prospect attended, missed, or engaged later.

Live sessions were built to educate before the appointment, not just pitch inside the room.

ARTIFACT 6 – CRM / TRACKING

CRM AND TRACKING USED TO MONITOR MOVEMENT FROM REGISTRATION THROUGH ATTENDANCE, FOLLOW-UP, APPOINTMENT, AND DOWNSTREAM BUSINESS PROGRESSION.

Tracking mattered because campaign success could not be judged at lead volume alone. Movement had to be visible across stages.

ARTIFACT 7 – LEADS GENERATED

Employer / Agency Field

1	A	B	C	E	F	G	H	I	J	K	L	
1	First Name	Last Name	Age	Agency	Email	Work Email	Phone	City	State	Zip	Source	Form Name
2				Department of Justice League				Tampa	Florida	33605		May 31, 2025 – Virtual Event
3			59+	Social security							Facebook	May 31, 2025 – Virtual Event
4			50-58	HUD							Other	May 31, 2025 – Virtual Event
5			59+	VA							Facebook	May 31, 2025 – Virtual Event
6			50-58	U.S. Dept. of Justice							Facebook	May 31, 2025 – Virtual Event
7			50-58	Umhc							Facebook	May 31, 2025 – Virtual Event
8			59+	N/A				New York	New York	10023	Facebook	May 31, 2025 – Virtual Event
9			59+	USAF/DOD HILL AFB				Salt Lake City	Utah	84123	Facebook	May 31, 2025 – Virtual Event
10			59+	Housing and Urban Development							Facebook	May 31, 2025 – Virtual Event
11			50-58	FAA							Facebook	May 31, 2025 – Virtual Event
12			59+	USAGM							Facebook	May 31, 2025 – Virtual Event
13			59+	Dot/faa				Lake Zurich	Illinois	60047	Facebook	May 31, 2025 – Virtual Event
14			59+	HHS				Los Angeles	California	90049	Facebook	May 31, 2025 – Virtual Event
15			39 Or Younger	VA					California		Facebook	May 31, 2025 – Virtual Event
16			59+	USPS					Indiana		Facebook	May 31, 2025 – Virtual Event
17			50-58	SSA				Lebanon	Pennsylvania	17042	Facebook	May 31, 2025 – Virtual Event
18			50-58	SSA				Birmingham	Alabama	35215	Facebook	May 31, 2025 – Virtual Event
19			59+	SSA					Georgia		Facebook	May 31, 2025 – Virtual Event
20			50-58	Dha				Marietta	Georgia	30068	Facebook	May 31, 2025 – Virtual Event
21			59+	military sealift command				Fort Plain	New York	13339	Facebook	May 31, 2025 – Virtual Event
22			50-58	FBI					Maryland		Facebook	May 31, 2025 – Virtual Event
23			59+	U.S. Treasury				Allen	Texas	75013	Facebook	May 31, 2025 – Virtual Event
24			59+	FRB/ TREASURY				New York City	New York	10069	Email	May 31, 2025 – Virtual Event
25			59+	DOD				Concord	California	94527	Facebook	May 31, 2025 – Virtual Event
26			50-58	DoD				Atlanta	Georgia		Facebook	May 31, 2025 – Virtual Event
27			59+	VA							Other	May 31, 2025 – Virtual Event
28			59+	Usaf				Dayton	Ohio	45424	Facebook	May 31, 2025 – Virtual Event
29			40-49	Library of Congress				Falls Church	Virginia	22041	Facebook	May 31, 2025 – Virtual Event
30			59+	VA				Baltimore	Maryland	21152	Facebook	May 31, 2025 – Virtual Event
31			59+	Treasury							Facebook	May 31, 2025 – Virtual Event
32			59+	DHS				Elkridge	Maryland	21075	Facebook	May 31, 2025 – Virtual Event
33			50-58	Department of Veterans Affairs				Waldorf	Marvland	20603	Facebook	May 31, 2025 – Virtual Event

ARTIFACT 7 – LEADS GENERATED

1	A	B	C	D	E	F	G	H	I	J	K	L
	First Name	Last Name	Age	Agency	Email	Work Email	Phone	City	State	Zip	Source Attribution	Form Name
34	[Redacted]	[Redacted]	50-58	Department of Treasury	[Redacted]	[Redacted]	[Redacted]	Sandton	Gauteng	2196	Facebook	May 31, 2025 – Virtual Event
35	[Redacted]	[Redacted]	50-58	IRS	[Redacted]	[Redacted]	[Redacted]	Huntington Stati	New York	11746	Facebook	May 31, 2025 – Virtual Event
36	[Redacted]	[Redacted]	50-58	DHA	[Redacted]	[Redacted]	[Redacted]	Lawton	Oklahoma	73505	Facebook	May 31, 2025 – Virtual Event
37	[Redacted]	[Redacted]	59+	DoD	[Redacted]	[Redacted]	[Redacted]	Port Orchard	Washington	98366	Facebook	May 31, 2025 – Virtual Event
38	[Redacted]	[Redacted]	59+	DCMA	[Redacted]	[Redacted]	[Redacted]	Richmond	Virginia	23234	Facebook	May 31, 2025 – Virtual Event
39	[Redacted]	[Redacted]	50-58	Internal Revenue Service	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
40	[Redacted]	[Redacted]	50-58	GSA	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
41	[Redacted]	[Redacted]	59+	Army	[Redacted]	[Redacted]	[Redacted]	Schertz	Texas	78154	Facebook	May 31, 2025 – Virtual Event
42	[Redacted]	[Redacted]	50-58	NASA Marshall Space Flight Center	[Redacted]	[Redacted]	[Redacted]	Madison	Alabama	35756	Facebook	May 31, 2025 – Virtual Event
43	[Redacted]	[Redacted]	59+	State Department	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
44	[Redacted]	[Redacted]	59+	U.S. Census Bureau	[Redacted]	[Redacted]	[Redacted]	Potomac	Maryland	20854	Facebook	May 31, 2025 – Virtual Event
45	[Redacted]	[Redacted]	50-58	Cis	[Redacted]	[Redacted]	[Redacted]	Queens	New York	11412	Facebook	May 31, 2025 – Virtual Event
46	[Redacted]	[Redacted]	50-58	DON	[Redacted]	[Redacted]	[Redacted]	Yorktown	Virginia	23693	Facebook	May 31, 2025 – Virtual Event
47	[Redacted]	[Redacted]	50-58	National Endowment for the Arts	[Redacted]	[Redacted]	[Redacted]	Odenton	Maryland	21113	Facebook	May 31, 2025 – Virtual Event
48	[Redacted]	[Redacted]	59+	DOL	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
49	[Redacted]	[Redacted]	50-58	Social security administration	[Redacted]	[Redacted]	[Redacted]	Claremont	California	91711	Facebook	May 31, 2025 – Virtual Event
50	[Redacted]	[Redacted]	59+	Wbdoc	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
51	[Redacted]	[Redacted]	50-58	DOD/USAF	[Redacted]	[Redacted]	[Redacted]	Crestview	Florida	32536	Facebook	May 31, 2025 – Virtual Event
52	[Redacted]	[Redacted]	50-58	Dol	[Redacted]	[Redacted]	[Redacted]	Woodland Park	Colorado	80863	Facebook	May 31, 2025 – Virtual Event
53	[Redacted]	[Redacted]	59+	DHS/FEMA	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
54	[Redacted]	[Redacted]	59+	VAMC	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
55	[Redacted]	[Redacted]	59+	US Postal Service	[Redacted]	[Redacted]	[Redacted]	Maple Heights	Ohio	44137	Facebook	May 31, 2025 – Virtual Event
56	[Redacted]	[Redacted]	50-58	HHS	[Redacted]	[Redacted]	[Redacted]	Baltimore	Maryland	21152	Facebook	May 31, 2025 – Virtual Event
57	[Redacted]	[Redacted]	59+	USA	[Redacted]	[Redacted]	[Redacted]	Cohoes	New York	12047	Facebook	May 31, 2025 – Virtual Event
58	[Redacted]	[Redacted]	59+	DOD-DHA/Eisenhower ER	[Redacted]	[Redacted]	[Redacted]				Other	May 31, 2025 – Virtual Event
59	[Redacted]	[Redacted]	59+	DOD	[Redacted]	[Redacted]	[Redacted]	Savannah	Georgia	31419	Facebook	May 31, 2025 – Virtual Event
60	[Redacted]	[Redacted]	59+	VHA	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
61	[Redacted]	[Redacted]	59+	USPS	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
62	[Redacted]	[Redacted]	59+	DFAS	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
63	[Redacted]	[Redacted]	59+	AMCOM. G-8	[Redacted]	[Redacted]	[Redacted]	Harvest	Alabama	35749	Facebook	May 31, 2025 – Virtual Event
64	[Redacted]	[Redacted]	50-58	DOD/USAF	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
65	[Redacted]	[Redacted]	59+	Defense	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event

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1	A	B	C	D	E	F	G	H	I	J	K	L
	First Name	Last Name	Age	Agency	Email	Work Email	Phone	City	State	Zip	Source	Form Name
66	[Redacted]	[Redacted]	50-58	IRS	[Redacted]	[Redacted]	[Redacted]	Detroit	Michigan	48242	Facebook	May 31, 2025 – Virtual Event
67	[Redacted]	[Redacted]	50-58	Department of Veterans Affairs	[Redacted]	[Redacted]	[Redacted]	Austin	Texas	78704	Facebook	May 31, 2025 – Virtual Event
68	[Redacted]	[Redacted]	59+	DOD	[Redacted]	[Redacted]	[Redacted]	Baltimore	Maryland	21152	Facebook	May 31, 2025 – Virtual Event
69	[Redacted]	[Redacted]	59+	IRS	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
70	[Redacted]	[Redacted]	59+	DON	[Redacted]	[Redacted]	[Redacted]	Laurel	Maryland	20723	Facebook	May 31, 2025 – Virtual Event
71	[Redacted]	[Redacted]	50-58	DOT&E	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
72	[Redacted]	[Redacted]	50-58	Air Force	[Redacted]	[Redacted]	[Redacted]	Colorado Spring	Colorado	80920	Facebook	May 31, 2025 – Virtual Event
73	[Redacted]	[Redacted]	50-58	Ssa	[Redacted]	[Redacted]	[Redacted]				Instagram	May 31, 2025 – Virtual Event
74	[Redacted]	[Redacted]	59+	DoD USAF	[Redacted]	[Redacted]	[Redacted]	Suisun	California	94585	Facebook	May 31, 2025 – Virtual Event
75	[Redacted]	[Redacted]	50-58	USACE	[Redacted]	[Redacted]	[Redacted]	Tacoma	Washington	98445	Facebook	May 31, 2025 – Virtual Event
76	[Redacted]	[Redacted]	59+	DISA	[Redacted]	[Redacted]	[Redacted]	Baltimore	Maryland	21152	Other	May 31, 2025 – Virtual Event
77	[Redacted]	[Redacted]	59+	DLA	[Redacted]	[Redacted]	[Redacted]	Baltimore	Maryland	21152	Facebook	May 31, 2025 – Virtual Event
78	[Redacted]	[Redacted]	50-58	HUD	[Redacted]	[Redacted]	[Redacted]	Norfolk	Virginia	23501	Facebook	May 31, 2025 – Virtual Event
79	[Redacted]	[Redacted]	50-58	Usace army	[Redacted]	[Redacted]	[Redacted]	Aiea	Hawaii	96701	Facebook	May 31, 2025 – Virtual Event
80	[Redacted]	[Redacted]	59+	Smithsonian	[Redacted]	[Redacted]	[Redacted]				Other	May 31, 2025 – Virtual Event
81	[Redacted]	[Redacted]	50-58	Department of Veterans Affairs	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
82	[Redacted]	[Redacted]	59+	USDA FNS	[Redacted]	[Redacted]	[Redacted]	Upper Marlboro	Maryland	20772	Facebook	May 31, 2025 – Virtual Event
83	[Redacted]	[Redacted]	59+	Legislative	[Redacted]	[Redacted]	[Redacted]	Bethesda	Maryland	20816	Facebook	May 31, 2025 – Virtual Event
84	[Redacted]	[Redacted]	59+	TREASURY	[Redacted]	[Redacted]	[Redacted]	New York City	New York	10069	Email	May 31, 2025 – Virtual Event
85	[Redacted]	[Redacted]	59+	Internal Revenue Service	[Redacted]	[Redacted]	[Redacted]	Hayward	California	94541	Facebook	May 31, 2025 – Virtual Event
86	[Redacted]	[Redacted]	59+	USDOT	[Redacted]	[Redacted]	[Redacted]	Mill Valley	California	94941	Email	May 31, 2025 – Virtual Event
87	[Redacted]	[Redacted]	59+	USACE	[Redacted]	[Redacted]	[Redacted]	New York City	New York	10069	Other	May 31, 2025 – Virtual Event
88	[Redacted]	[Redacted]	50-58	DHS	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
89	[Redacted]	[Redacted]	50-58	Treasury	[Redacted]	[Redacted]	[Redacted]	Roseville	Michigan	48066	Facebook	May 31, 2025 – Virtual Event
90	[Redacted]	[Redacted]	50-58	DHS	[Redacted]	[Redacted]	[Redacted]	Owings	Maryland	20736	Facebook	May 31, 2025 – Virtual Event
91	[Redacted]	[Redacted]	59+	Veterans Affairs	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
92	[Redacted]	[Redacted]	59+	FDA/CDER/OM/FAB	[Redacted]	[Redacted]	[Redacted]	Fairfax	Virginia	22031	Facebook	May 31, 2025 – Virtual Event
93	[Redacted]	[Redacted]	59+	Don	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
94	[Redacted]	[Redacted]	59+	Dod	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
95	[Redacted]	[Redacted]	40-49	Department of Defense	[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event
96	[Redacted]	[Redacted]	50-58	Department of the Treasury	[Redacted]	[Redacted]	[Redacted]	Buffalo	New York	14227	Facebook	May 31, 2025 – Virtual Event
97	[Redacted]	[Redacted]			[Redacted]	[Redacted]	[Redacted]				Facebook	May 31, 2025 – Virtual Event

Evidence of Event-Specific Capture

ARTIFACT 7 – LEADS GENERATED

Webhook Captured

1	A	B	C	D	E	F	G				K	L
	First Name	Last Name	Age	Agency	Email	Work Email	Phone	City	State	Zip	Source	Form Name
98	John	Smith	50-58	DOT- Federal Aviation Administrati	johnsmith@gmail.com	johnsmith@dot.gov	505-555-1234				Facebook	May 31, 2025 – Virtual Event
99	John	Smith	50-58	DOJ	johnsmith@gmail.com	johnsmith@doj.gov	202-555-1234				Facebook	May 31, 2025 – Virtual Event
100	John	Smith	50-58	Interior Fish and Wildlife Service	johnsmith@gmail.com	johnsmith@fws.gov	202-555-1234				Facebook	May 31, 2025 – Virtual Event
101	John	Smith	50-58	OMHA	johnsmith@gmail.com	johnsmith@omha.gov	505-555-1234	Albuquerque	New Mexico	87114	Other	May 31, 2025 – Virtual Event
102	John	Smith		Department of Labor	johnsmith@gmail.com	johnsmith@dol.gov	202-555-1234				Facebook	May 31, 2025 – Virtual Event
103	John	Smith	50-58	Veterans Affairs	johnsmith@gmail.com	johnsmith@va.gov	202-555-1234	Santa Fe	New Mexico	87507	Facebook	May 31, 2025 – Virtual Event
104	John	Smith	59+	VA MEDICAL CENTER	johnsmith@gmail.com	johnsmith@va.gov	313-438-4388	Detroit	Michigan	48242	Email	May 31, 2025 – Virtual Event
105	John	Smith	50-58	Nsf	johnsmith@gmail.com	johnsmith@nsf.gov	301-237-2745	Upper Marlboro	Maryland	20774	Facebook	May 31, 2025 – Virtual Event
106	John	Smith	50-58	HUD	johnsmith@gmail.com	johnsmith@hud.gov	202-555-1234	Washington	District of Colum	20009	Facebook	May 31, 2025 – Virtual Event
107	John	Smith	50-58	VA/VHA	johnsmith@gmail.com	johnsmith@va.gov	602-950-9000	Phoenix	Arizona	85025	Facebook	May 31, 2025 – Virtual Event
108	John	Smith	40-49	Department of Health and Human S	johnsmith@gmail.com	johnsmith@hhs.gov	202-205-4000	Baltimore	Maryland	21152	Facebook	May 31, 2025 – Virtual Event
109	John	Smith	50-58	FEMA	johnsmith@gmail.com	johnsmith@fema.gov	817-688-8819				Facebook	May 31, 2025 – Virtual Event
110	John	Smith	50-58	USCiS	johnsmith@gmail.com	johnsmith@uscis.gov	202-452-8000				Facebook	May 31, 2025 – Virtual Event
111	John	Smith	59+	Nnn	johnsmith@gmail.com	johnsmith@nnn.gov	202-555-1234				Facebook	May 31, 2025 – Virtual Event
112	John	Smith	50-58	Department of Ag	johnsmith@gmail.com	johnsmith@usda.gov	202-690-0000				Facebook	May 31, 2025 – Virtual Event
113	John	Smith	59+	Dept of Veterans Affairs	johnsmith@gmail.com	johnsmith@va.gov	1-877-762-7839	Seminole	Florida	33772	Facebook	May 31, 2025 – Virtual Event
114	John	Smith	50-58	DHS, cis	johnsmith@gmail.com	johnsmith@dhs.gov	202-686-0000	Atlanta	Georgia	30346	Facebook	May 31, 2025 – Virtual Event
115	John	Smith	50-58	Social Security	johnsmith@gmail.com	johnsmith@ssa.gov	800-772-6819				Facebook	May 31, 2025 – Virtual Event
116	John	Smith	59+	EPA	johnsmith@gmail.com	johnsmith@epa.gov	202-555-1234	Atlanta	Georgia	30331	Facebook	May 31, 2025 – Virtual Event
117	John	Smith	50-58	DHS/FEMA	johnsmith@gmail.com	johnsmith@dhs.gov	202-205-4000	Bowie	Maryland	20721	Facebook	May 31, 2025 – Virtual Event
118	John	Smith	39 Or Younger	DHS OCIO	johnsmith@gmail.com	johnsmith@dhs.gov	202-555-1234				Facebook	May 31, 2025 – Virtual Event
119	John	Smith	59+	IRS	johnsmith@gmail.com	johnsmith@irs.gov	202-555-1234	Kansas City	Missouri	64118	Other	May 31, 2025 – Virtual Event
120	John	Smith	59+	VA	johnsmith@gmail.com	johnsmith@va.gov	202-555-1234	Maryville	Tennessee	37801	Facebook	May 31, 2025 – Virtual Event
121	John	Smith	50-58	Department of defense	johnsmith@gmail.com	johnsmith@dod.gov	202-555-1234	Philadelphia	Pennsylvania	19144	Facebook	May 31, 2025 – Virtual Event
122	John	Smith	50-58	Veterans affairs	johnsmith@gmail.com	johnsmith@va.gov	202-555-1234	Philadelphia	Pennsylvania	19130	Facebook	May 31, 2025 – Virtual Event
123	John	Smith	50-58	DHS	johnsmith@gmail.com	johnsmith@dhs.gov	202-555-1234				Facebook	May 31, 2025 – Virtual Event
124	John	Smith	50-58	VA Hospital	johnsmith@gmail.com	johnsmith@va.gov	215-261-0000	Philadelphia	Pennsylvania	19121	Facebook	May 31, 2025 – Virtual Event
125	John	Smith	50-58	IRS/Treasury	johnsmith@gmail.com	johnsmith@irs.gov	202-555-1234				Other	May 31, 2025 – Virtual Event
126	John	Smith	50-58	DHA	johnsmith@gmail.com	johnsmith@dha.mil	202-555-1234				Other	May 31, 2025 – Virtual Event
127	John	Smith	50-58	CBP	johnsmith@gmail.com	johnsmith@cbp.gov	202-555-1234	Myrtle Beach	South Carolina	29579	Facebook	May 31, 2025 – Virtual Event
128	John	Smith	59+	Usps	johnsmith@gmail.com	johnsmith@usps.gov	202-555-1234	Orlando	Florida	32828	Facebook	May 31, 2025 – Virtual Event

ARTIFACT 7 – LEADS GENERATED

1	A	B	C	D	E	F	G	H	I	J	K	L
	First Name	Last Name	Age	Agency	Email	Work Email	Phone	City	State	Zip	Source	Form Name
128	Michelle	Wright	59+	Usps			407-252-1234	Orlando	Florida	32828	Facebook	May 31, 2025 – Virtual Event
129	Michelle	Wright	59+	US Air Force Academy			773-234-5678	Chicago	Illinois	60602	Facebook	May 31, 2025 – Virtual Event
130	Michelle	Wright	50-58	Internal Revenue Service	Michelle.Wright@irs.gov		773-234-5678				Email	May 31, 2025 – Virtual Event
131	Michelle	Wright	50-58	DHS			908-234-5678	Bellmawr	New Jersey	8031	Facebook	May 31, 2025 – Virtual Event
132	Michelle	Wright	50-58	Internal revenue			212-234-5678	New York City	New York	10069	Facebook	May 31, 2025 – Virtual Event
133	Michelle	Wright	59+	Dept of homeland Security	Michelle.Wright@dhs.gov		212-234-5678				Facebook	May 31, 2025 – Virtual Event
134	Michelle	Wright	59+	Fema	Michelle.Wright@fema.gov		717-234-5678	Jenkintown	Pennsylvania	19046	Facebook	May 31, 2025 – Virtual Event
135	Michelle	Wright	59+	DHS/FPS	Michelle.Wright@dhs.gov		917-234-5678				Facebook	May 31, 2025 – Virtual Event
136	Michelle	Wright	59+	IRS			773-234-5678	Chicago	Illinois	60602	Facebook	May 31, 2025 – Virtual Event
137	Michelle	Wright	59+	Civilian			212-234-5678	New York City	New York	10069	Other	May 31, 2025 – Virtual Event
138	Michelle	Wright	40-49	Irs	Michelle.Wright@irs.gov		606-234-5678	Alexandria	Kentucky	41001	Facebook	May 31, 2025 – Virtual Event
139	Michelle	Wright	50-58	IRS			312-234-5678	Chicago	Illinois	60631	Facebook	May 31, 2025 – Virtual Event
140	Michelle	Wright	50-58	Dol/eta			853-234-5678	Burnsville	North Carolina		Facebook	May 31, 2025 – Virtual Event
141	Michelle	Wright	59+	Depth of Treasury IRS			813-234-5678	Castle Hayne	North Carolina	28429	Other	May 31, 2025 – Virtual Event
142	Michelle	Wright	50-58	Treasury	Michelle.Wright@treasury.gov		773-234-5678				Facebook	May 31, 2025 – Virtual Event
143	Michelle	Wright	50-58	U.S. Department of Justice	Michelle.Wright@doj.gov		301-234-5678				Facebook	May 31, 2025 – Virtual Event
144	Michelle	Wright	50-58	USDA Forest service	Michelle.Wright@usda.gov		208-234-5678	Boise	Idaho	83703	Facebook	May 31, 2025 – Virtual Event
145	Michelle	Wright	50-58	VA	Michelle.Wright@va.gov		703-234-5678				Facebook	May 31, 2025 – Virtual Event
146	Michelle	Wright	50-58	Dept of Veterans Affairs	Michelle.Wright@va.gov		410-234-5678	Havre de Grace	Maryland	21078	Facebook	May 31, 2025 – Virtual Event
147	Michelle	Wright	50-58	Irs us treasury			512-234-5678	Georgetown	Texas	78633	Facebook	May 31, 2025 – Virtual Event
148	Michelle	Wright	50-58	ITS			203-234-5678	New Haven	Connecticut	6512	Other	May 31, 2025 – Virtual Event
149	Michelle	Wright	59+	Uspsu	Michelle.Wright@uspsu.gov		973-234-5678	Union City	New Jersey	7087	Facebook	May 31, 2025 – Virtual Event
150	Michelle	Wright	59+	DA	Michelle.Wright@da.gov		703-234-5678	Fairfax	Virginia	22036	Facebook	May 31, 2025 – Virtual Event
151	Michelle	Wright	59+	Hhs	Michelle.Wright@hhs.gov		301-234-5678				Facebook	May 31, 2025 – Virtual Event
152	Michelle	Wright	50-58	Dept of Treasury	Michelle.Wright@treasury.gov		410-234-5678				Facebook	May 31, 2025 – Virtual Event
153	Michelle	Wright	59+	IRS			832-234-5678	Houston	Texas	77007	Facebook	May 31, 2025 – Virtual Event
154	Michelle	Wright	50-58	Dol/eta			853-234-5678				Facebook	May 31, 2025 – Virtual Event
155	Michelle	Wright	59+	IRS			615-234-5678	Nashville	Tennessee	37215	Facebook	May 31, 2025 – Virtual Event
156	Michelle	Wright	50-58	Fema	Michelle.Wright@fema.gov		717-234-5678				Facebook	May 31, 2025 – Virtual Event
157	Michelle	Wright	50-58	IRS Facilities Management Security	Michelle.Wright@irs.gov		410-234-5678				Facebook	May 31, 2025 – Virtual Event
158	Michelle	Wright	50-58	USPS	Michelle.Wright@usps.gov		215-234-5678				Facebook	May 31, 2025 – Virtual Event
159	Michelle	Wright	50-58	IRS			215-234-5678	Philadelphia	Pennsylvania	19139	Facebook	May 31, 2025 – Virtual Event

ARTIFACT 7 – LEADS GENERATED

1	A	B	C	D	E	F	G	H	I	J	K	L
	First Name	Last Name	Age	Agency	Email	Work Email	Phone	City	State	Zip	Source	Form Name
159	[Redacted]	[Redacted]	50-58	IRS	[Redacted]	[Redacted]	[Redacted]	Philadelphia	Pennsylvania	19139	Facebook	May 31, 2025 – Virtual Event
160	[Redacted]	[Redacted]	40-49	USACE	[Redacted]	[Redacted]	[Redacted]	San Jose	California	95116	Other	May 31, 2025 – Virtual Event
161	[Redacted]	[Redacted]	50-58	DOD	[Redacted]	[Redacted]	[Redacted]				Other	May 31, 2025 – Virtual Event
162	[Redacted]	[Redacted]	50-58	NOAA Communications	[Redacted]	[Redacted]	[Redacted]	Arlington	Virginia	22207	Facebook	May 31, 2025 – Virtual Event
163	[Redacted]	[Redacted]	50-58	Dod	[Redacted]	[Redacted]	[Redacted]	Kensington	Maryland	20895	Facebook	May 31, 2025 – Virtual Event
164	[Redacted]	[Redacted]	59+	USACE	[Redacted]	[Redacted]	[Redacted]	San Jose	California	95116	Email	May 31, 2025 – Virtual Event
165	[Redacted]	[Redacted]	50-58	DAF	[Redacted]	[Redacted]	[Redacted]				Other	May 31, 2025 – Virtual Event
166	[Redacted]	[Redacted]	59+	Irs	[Redacted]	[Redacted]	[Redacted]	Fairfax	Virginia	22031	Facebook	May 31, 2025 – Virtual Event
167	[Redacted]	[Redacted]	50-58	n/a	[Redacted]	[Redacted]	[Redacted]	Tampa	Florida	33605	Facebook	May 31, 2025 – Virtual Event
168	[Redacted]	[Redacted]	50-58	DoD	[Redacted]	[Redacted]	[Redacted]	Philadelphia	Pennsylvania	19019	Facebook	May 31, 2025 – Virtual Event
169	[Redacted]	[Redacted]	50-58	DoDEA	[Redacted]	[Redacted]	[Redacted]	Ft. Washington	Maryland	20744	Facebook	May 31, 2025 – Virtual Event
170	[Redacted]	[Redacted]	50-58	irs	[Redacted]	[Redacted]	[Redacted]	Washington	District of Colum	20011	Other	May 31, 2025 – Virtual Event
171	[Redacted]	[Redacted]	50-58	unknown	[Redacted]	[Redacted]	[Redacted]	Tampa	Florida	33605		May 31, 2025 – Virtual Event
172	[Redacted]	[Redacted]	50-58	unknown	[Redacted]	[Redacted]	[Redacted]	Tampa	Florida	33605	Facebook	May 31, 2025 – Virtual Event
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All 172 Leads were generated from a single event

MEASUREMENT FRAMEWORK

WHAT WAS USED TO REVIEW CAMPAIGN ECONOMICS BEYOND SURFACE REGISTRATION METRICS.

Reporting was reviewed across spend, registrations, live attendance, follow-up response, appointments, written business, and premium contribution over time.

- Early tracked spend
- Registration volume
- Live attendance
- Early follow-up

The campaign was measured as a movement system, not just a lead source.

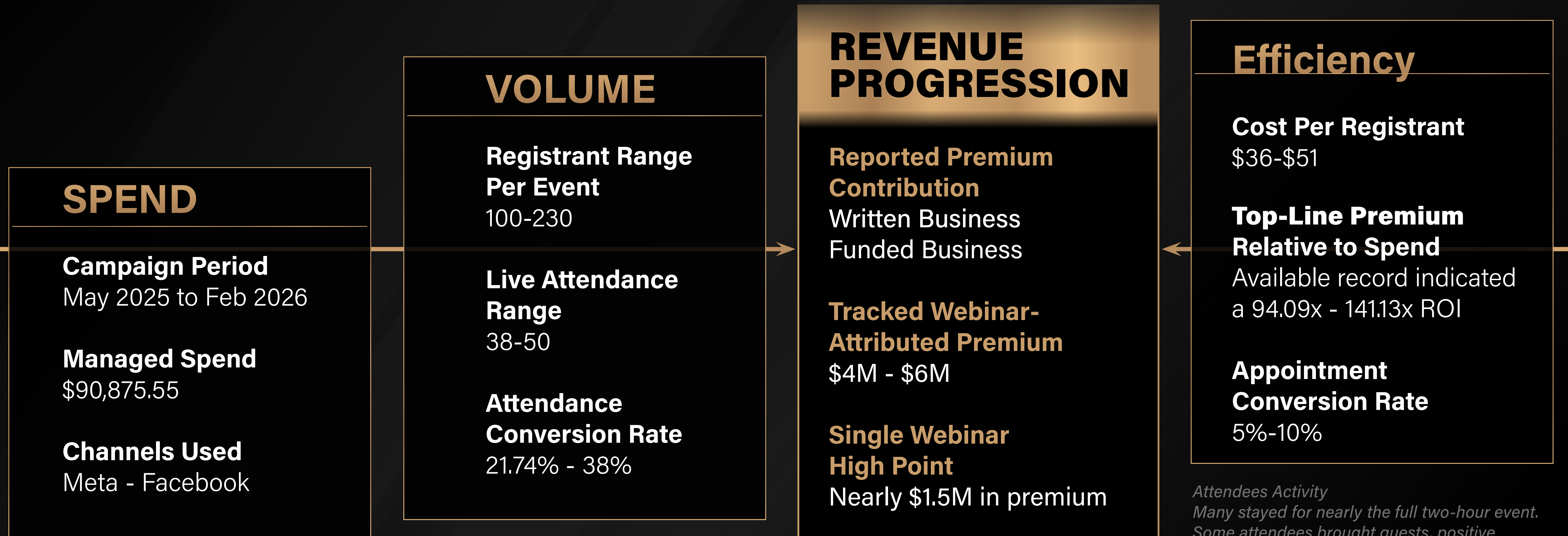
MEASUREMENT FRAMEWORK

- Early **tracked spend** from April through September 2025 totaled \$15,489.03
- Webinar **registration volume** ranged from roughly 100 to 230 per event
- Live **attendance** on recent sessions ranged from about 38 to 50 attendees
- Within the tracked reporting early **webinar-driven follow-up** contributed roughly \$1M to \$2M in premium
- **“One agent reportedly produced nearly \$1.5M from a single seminar”**
- Later cumulative tracked webinar-attributed premium reached roughly **\$4M, then \$6M** by 2026

This reporting structure made it possible to read the campaign as a progression from paid attention to premium outcome, not just as a registration dashboard.

PERFORMANCE & ECONOMICS

HOW THE SYSTEM WAS EVALUATED ACROSS STAGES



Strongest Sources: Meta and email

*Strongest Sign-Up Periods
Acceleration in final 3-5 days*

*Attendees Activity
Many stayed for nearly the full two-hour event.
Some attendees brought guests, positive comments, and repeat interest.*

PERFORMANCE & ECONOMICS

SPEND RECORD

Premium figures shown here reflect reported or attributed top-line premium contribution within the tracked campaign environment and **should not be interpreted as net profit.**

2	Campaign Type	Advertising Platform	Event Date(s)	Campaign Status	Budget	Total Spent	Notes
3	Webinar	Meta: Facebook	9-Apr	Completed	\$2,000.00		
4	Webinar	Meta: Facebook	31-May	Completed	\$3,500.00		
5	Webinar	Meta: Facebook	7-Aug	Completed	\$2,499.95		
6	Webinar	Meta: Facebook	12-Aug	Completed	\$2,490.08		
7	Webinar	Meta: Facebook	11-Sep	Completed	\$2,500.00		
8	Webinar	Meta: Facebook	1 - Oct	Completed	\$2,496.00		
9	Webinar	Meta: Facebook	21 - Oct	Completed	\$2,498.00		
10	Webinar	LinkedIn	21 - Oct	Completed	\$2,047.00		
11	Webinar	Meta: Facebook	6 - Nov	Completed	\$2,492.65		
12	Webinar	Meta: Facebook	18 - Nov	Completed	\$4,997.12		
13	Webinar	Meta: Facebook	4 - Dec	Completed	\$2,500.00		
14	Webinar	Meta: Facebook	11 - Dec	Completed	\$2,496.23		
15	Webinar	Meta: Facebook	30 - Dec	Completed	\$2,500.00		
16					2025 Total:	\$35,017.03	
17	<i>New Year 2026</i>						
18	Webinar	Meta: Facebook	13-Jan	Completed	\$2,499.93		
19	Webinar	Meta: Facebook	24-Jan	Completed	\$2,499.47		
20	Webinar	Meta: Facebook	10 Feb	Completed	\$2,498.31		
21					YTD Total:	\$7,497.71	
22							
23					Lifetime Total:	\$42,514.74	

Directly Attributed Premium
\$4M - \$6M reported contribution

Reported Premium Relative to Paid Spend, Not Net Profit
Available record indicated a 94.09x - 141.13x ROI

SCOPE OF WORK

CAMPAIGN ARCHITECTURE

- Paid traffic deployment through Meta
- Webinar promotion system
- Landing page and registration flow
- Registration-to-attendance support
- Follow-up logic for attendees and no-shows
- Reporting and stage-level performance review

OPERATIONAL OWNERSHIP

MULTIPLE WEBINAR LAUNCHES ACROSS APRIL TO SEPTEMBER 2025

- Federal-specific messaging tied to VERA, RIF, VSIP, and retirement uncertainty
- Delivery and follow-up refined over repeated launches
- Webinar recordings reused for nurture and follow-up
- Reporting reviewed beyond registrations into attendance, appointments, and premium movement

WHY IT WORKED

- Attention was narrowed around a specific federal problem
- Registration was tied to event-specific urgency
- The webinar built trust before the appointment
- Follow-up preserved movement after the event
- Revenue depended on progression across stages, not top-of-funnel volume alone
- Attendee and no-show follow-up created additional appointment opportunities beyond the live room

SUPPORTING PROOF

- 100 to 230 registrants per event
- 38 to 50 live attendees
- 10 to 15 immediate appointments on some sessions
- 5% to 10% follow-up conversion into one-on-one appointments
- Several clients from the April and May window closed later
- One agent closed nearly \$1.5M from a single seminar

CORE INSIGHT

The system worked because each stage carried the next one forward. The ad created relevance, the webinar created trust, the follow-up preserved intent, and revenue came from governed movement across the full chain.

The Federal Service
Sponsored

Federal employees nearing retirement, especially those concerned about potential changes affecting their career and retirement plan, this virtual seminar will provide valuable insights into the current federal workforce restructuring and its implications for your retirement.

Don't miss this opportunity to stay informed and prepared.

FEDERAL EMPLOYEES NEARING RETIREMENT:
If you're still unsure about the VERA and VSIP programs...

JOIN US FOR AN IN-PERSON SEMINAR!

SATURDAY MAY 31ST
10:00AM - 1:00PM & 2:00PM - 5:00PM

Virtual Seminar [Learn more](#)

WEBINAR REGISTRATION

Attending Virtual Session * 1/13/2026 6pm EST

Name *

First Last

Work Email *

Personal Email *

Mobile * +1 201-555-0123 Phone * +1 201-555-0123

Dept./Agency *

1	A	B	C	D	E	F	G	H	I	J	K	L
	First Name	Last Name	Age	Agency	Email	Work Email	Phone	City	State	Zip	Source	Form Name
98	John	Smith	50-58	DOT- Federal Aviation Administratic	john.smith@dot.gov	john.smith@dot.gov	505-555-1234				Facebook	May 31, 2025 - Virtual Event
99	Jane	Johnson	50-58	DOJ	jane.johnson@doj.gov	jane.johnson@doj.gov	202-555-5678				Facebook	May 31, 2025 - Virtual Event
100	Mike	Miller	50-58	Interior Fish and Wildlife Service	mike.miller@fws.gov	mike.miller@fws.gov	202-555-9012				Facebook	May 31, 2025 - Virtual Event
101	William	White	50-58	OMHA	william.white@omha.gov	william.white@omha.gov	505-555-3456	Albuquerque	New Mexico	87114	Other	May 31, 2025 - Virtual Event
102	John	Young		Department of Labor	john.young@dol.gov	john.young@dol.gov	202-555-7890				Facebook	May 31, 2025 - Virtual Event
103	Harold	Harold	50-58	Veterans Affairs	harold.harold@va.gov	harold.harold@va.gov	202-555-2345	Santa Fe	New Mexico	87507	Facebook	May 31, 2025 - Virtual Event
104	Harold	Harold	59+	VA MEDICAL CENTER	harold.harold@va.gov	harold.harold@va.gov	202-555-6789	Detroit	Michigan	48242	Email	May 31, 2025 - Virtual Event
			50-58	Nsf	nsf@nsf.gov	nsf@nsf.gov	301-237-2700	Upper Marlboro	Maryland	20774	Facebook	May 31, 2025 - Virtual Event
			50-58	HUD	hud@hud.gov	hud@hud.gov	202-555-1234	Washington	District of Colum	20009	Facebook	May 31, 2025 - Virtual Event
			50-58	VA/VHA	va.vha@va.gov	va.vha@va.gov	202-555-5678	Phoenix	Arizona	85025	Facebook	May 31, 2025 - Virtual Event
			40-49	Department of Health and Human S	hhs@hhs.gov	hhs@hhs.gov	202-555-9012	Baltimore	Maryland	21152	Facebook	May 31, 2025 - Virtual Event
			50-58	FEMA	fema@fema.gov	fema@fema.gov	202-555-3456				Facebook	May 31, 2025 - Virtual Event
			50-58	USCIS	uscis@uscis.gov	uscis@uscis.gov	202-555-7890				Facebook	May 31, 2025 - Virtual Event
			59+	Nnn	nnn@nnn.gov	nnn@nnn.gov	202-555-1234				Facebook	May 31, 2025 - Virtual Event
			50-58	Department of Ag	dot@dot.gov	dot@dot.gov	202-555-5678				Facebook	May 31, 2025 - Virtual Event
			59+	Dept of Veterans Affairs	va@va.gov	va@va.gov	202-555-9012	Seminole	Florida	33772	Facebook	May 31, 2025 - Virtual Event
			50-58	DHS, cis	dhs@dhs.gov	dhs@dhs.gov	202-555-3456	Atlanta	Georgia	30346	Facebook	May 31, 2025 - Virtual Event
			50-58	Social Security	ssa@ssa.gov	ssa@ssa.gov	202-555-7890				Facebook	May 31, 2025 - Virtual Event
			59+	EPA	epa@epa.gov	epa@epa.gov	202-555-1234	Atlanta	Georgia	30331	Facebook	May 31, 2025 - Virtual Event
			50-58	DHS/FEMA	dhs@fema.gov	dhs@fema.gov	202-555-5678	Bowie	Maryland	20721	Facebook	May 31, 2025 - Virtual Event
			39 Or Younger	DHS OCIO	ocio@dhs.gov	ocio@dhs.gov	202-555-9012				Facebook	May 31, 2025 - Virtual Event
			59+	IRS	irs@irs.gov	irs@irs.gov	202-555-3456	Kansas City	Missouri	64118	Other	May 31, 2025 - Virtual Event
			59+	VA	va@va.gov	va@va.gov	202-555-7890	Maryville	Tennessee	37801	Facebook	May 31, 2025 - Virtual Event
			50-58	Department of defense	defense@defense.gov	defense@defense.gov	202-555-1234	Philadelphia	Pennsylvania	19144	Facebook	May 31, 2025 - Virtual Event
			50-58	Veterans affairs	va@va.gov	va@va.gov	202-555-5678	Philadelphia	Pennsylvania	19130	Facebook	May 31, 2025 - Virtual Event
			50-58	DHS	dhs@dhs.gov	dhs@dhs.gov	202-555-9012	Philadelphia	Pennsylvania	19121	Facebook	May 31, 2025 - Virtual Event
			50-58	VA Hospital	va@va.gov	va@va.gov	202-555-3456				Other	May 31, 2025 - Virtual Event
			50-58	IRS/Treasury	irs@treasury.gov	irs@treasury.gov	202-555-7890				Other	May 31, 2025 - Virtual Event
			50-58	DHA	dha@dha.gov	dha@dha.gov	202-555-1234				Other	May 31, 2025 - Virtual Event
			50-58	CBP	cbp@cbp.gov	cbp@cbp.gov	202-555-5678	Myrtle Beach	South Carolina	29579	Facebook	May 31, 2025 - Virtual Event
			59+	Usps	usps@usps.gov	usps@usps.gov	202-555-9012	Orlando	Florida	32828	Facebook	May 31, 2025 - Virtual Event

INDEIMO
INFRA.

MOST ASKED QUESTION
IS THIS SCALABLE?

FLORIDA RETIREMENT SYSTEM (D.R.O.P.) WEBINAR GROWTH SYSTEM

The campaign appears to have solved for attention and lead capture faster than the downstream system solved for processing and conversion. The volume and specificity of leads suggest that follow-up capacity, close infrastructure, and advisor-side processing likely became the next limiting variable.

What was not fully visible in the available record was downstream harvest quality from follow-up through written and funded business.

CORE FINDING

- Over a four-month period and five webinars, the campaign generated more than 1,000 niche-specific FRS / DROP leads
- The system targeted active FRS members, current or potential DROP participants, and people naming concrete concerns tied to lump sums, re-employment, and benefit timing
- 200 to 300 leads were generated per event

2	Campaign Type	Advertising Platform	Event Date(s)	Campaign Status	Budget	Total Spent
3	Webinar	Meta: Facebook	25-Sep	Completed	\$1,997.18	
4	Webinar	Meta: Facebook	25-Oct	Completed	\$1,899.71	
5	Webinar	Meta: Facebook	15 - Nov	Completed	\$1,792.79	
6	Webinar	Meta: Facebook	13 - Dec	Completed	\$1,898.14	
7	Webinar	Meta: Facebook	17 - Jan	Completed	\$2,495.56	
8					Total:	\$10,083.3
9						
10	<i>Upcoming Campaigns</i>					

WHAT MADE IT DIFFERENT

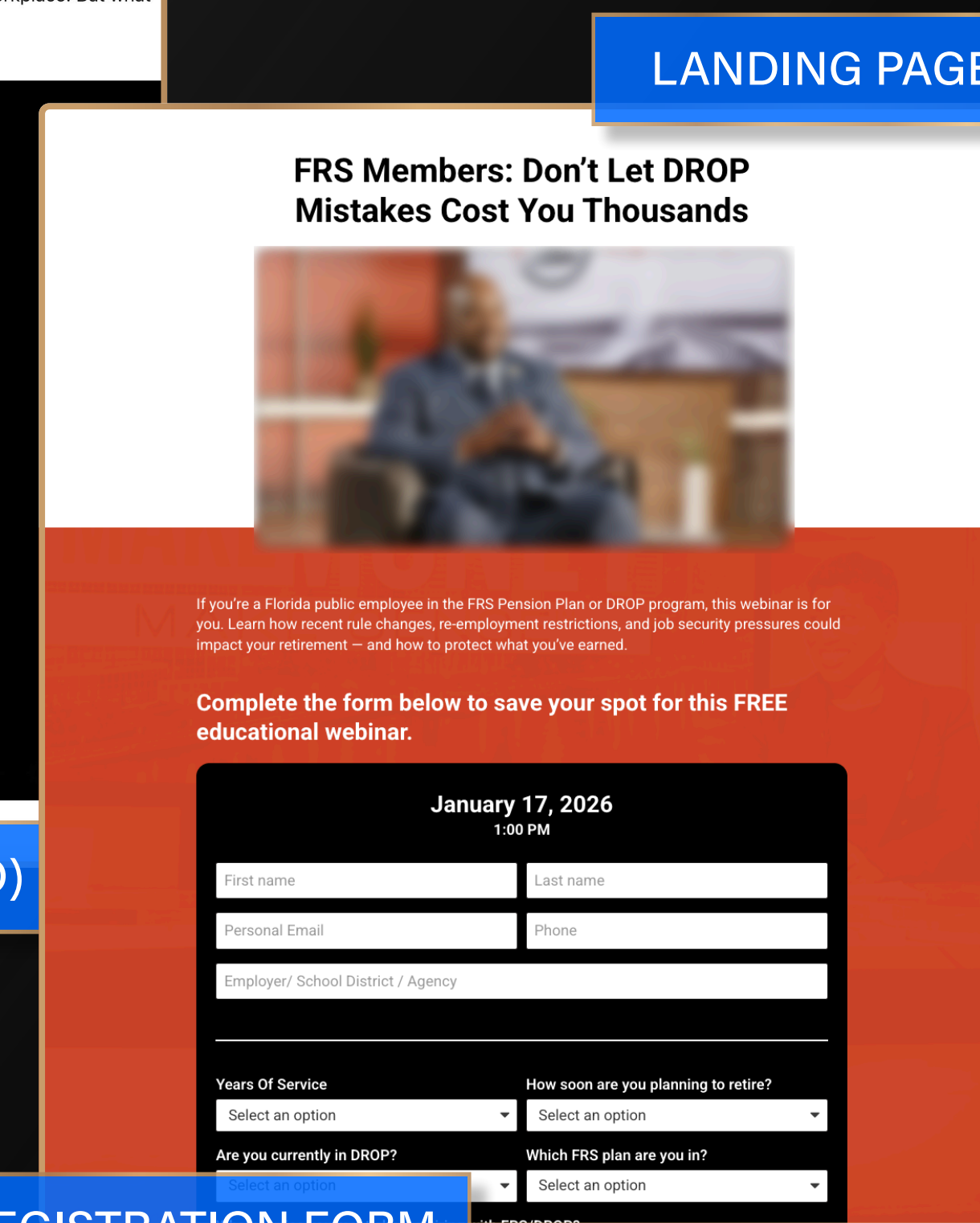
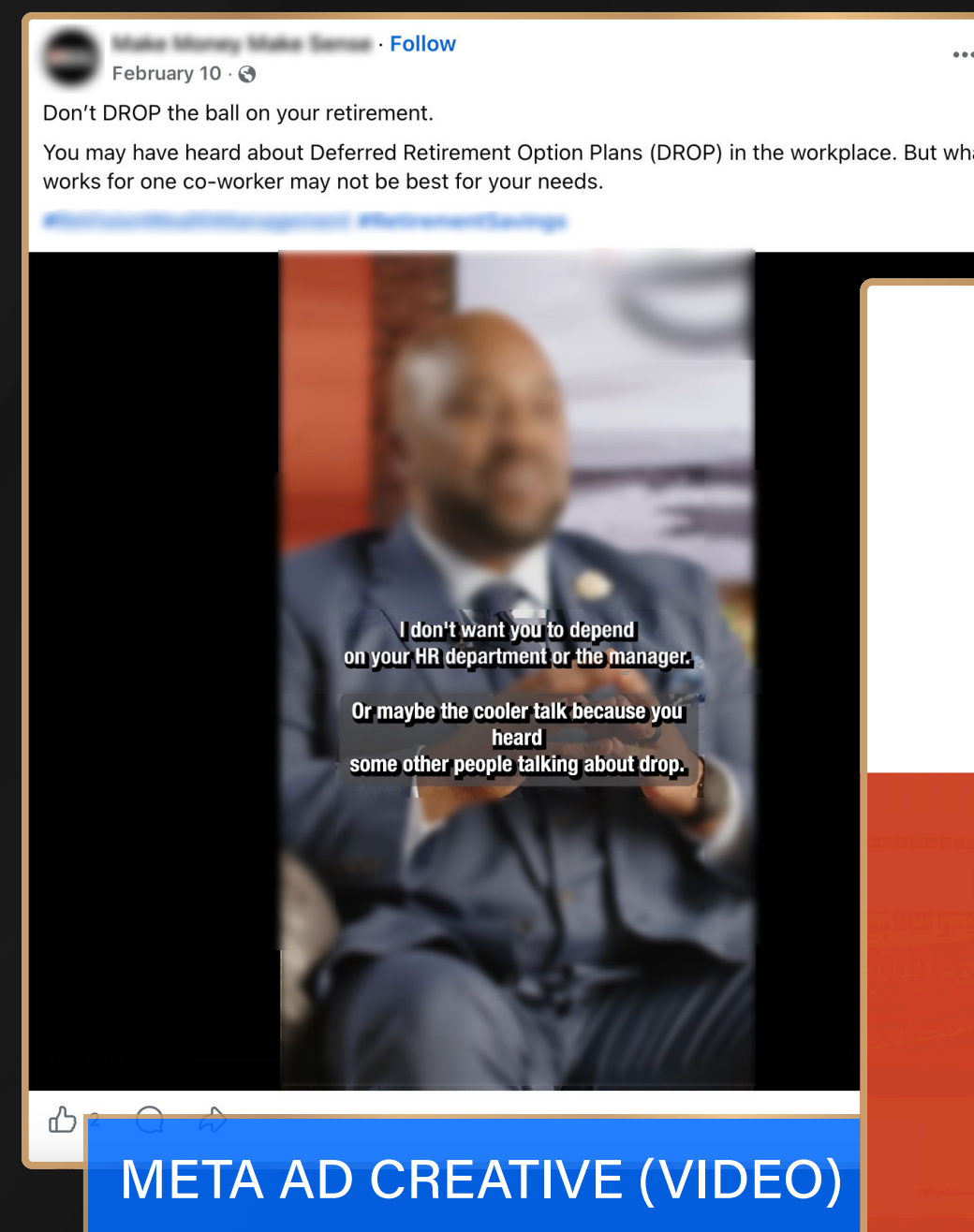
THE SYSTEM DID NOT TARGET "RETIREEES" BROADLY. IT TARGETED:

1. Active FRS members
2. Current or potential DROP participants
3. Employees with specific employer affiliation
4. People with identifiable retirement timing windows
5. People naming concrete concerns tied to lump sums, re-employment, and benefit timing

ARTIFACT – META AD CREATIVE

THE SYSTEM DID NOT TARGET “RETIREEES” BROADLY. IT TARGETED

- Active FRS members
- Current or potential DROP participants
- Employees with specific employer affiliation
- People with identifiable retirement timing windows
- People naming concrete concerns tied to lump sums, re-employment, and benefit timing



VOLUME PROOF

1	First Name	Last Name	Email	Phone	City	State	Zip	Employer / School District / Agency	Years of Service	Plan to Retire	Currently In DROP	Current FRS Plan	Biggest Concern	Source	Event
2					Tampa	Florida	33603	Fdc	20+	1-3 years	Yes	Pension Plan	Taxes on DROP lump sum	facebook	Webinar January 17, 2026 1:00 PM
3					Tallahassee	Florida	32309	State of Florida, EOG	20+	Within 1 year	Yes	Pension Plan	Taxes on DROP lump sum	email	Webinar January 17, 2026 1:00 PM
4					Tallahassee	Florida	32311	State of Florida	20+	1-3 years	Yes	N/A	Taxes on DROP lump sum	email	Webinar January 17, 2026 1:00 PM
5					East Palatka	Florida	32131	St. Johns River Water Management District	20+	Within 1 year	Yes	Pension Plan	Running out of money	email	Webinar January 17, 2026 1:00 PM
6					Grand Ridge	Florida	32442	dcf	20+	1-3 years	Yes	Pension Plan	Taxes on DROP lump sum	email	Webinar January 17, 2026 1:00 PM
7					Tampa	Florida	33610	Plant City	20+	1-3 years	Yes	Pension Plan	Taxes on DROP lump sum	facebook	Webinar January 17, 2026 1:00 PM
8					Ocala	Florida	34476	Marion County School System	20+	1-3 years	Yes	Pension Plan	Job security / early retirement pressures	other	Webinar January 17, 2026 1:00 PM
9					Jacksonville	Florida	32201	FDOH	20+	Within 1 year	Yes	Pension Plan	Running out of money	email	Webinar January 17, 2026 1:00 PM
10					Jacksonville	Florida	32201	Duval County Schools	20+	1-3 years	Yes	Pension Plan	Taxes on DROP lump sum	email	Webinar January 17, 2026 1:00 PM
11					Miami	Florida	33165	Miami Dade	20+	Within 1 year	Yes	Pension Plan	Running out of money	email	Webinar January 17, 2026 1:00 PM
12					Jacksonville	Florida	32255	Department of Children and Families	20+	1-3 years	Yes	Pension Plan	Timing when to enter/exit DROP	email	Webinar January 17, 2026 1:00 PM
13					Tallahassee	Florida	32301	DOH	20+	3-5 years	Yes	N/A	Taxes on DROP lump sum	email	Webinar January 17, 2026 1:00 PM
14					Jacksonville	Florida	32255	Department of Children & Families	20+	1-3 years	Yes	Pension Plan	Timing when to enter/exit DROP	email	Webinar January 17, 2026 1:00 PM
15					Lakeland	Florida	33805	Polk County School District	20+	1-3 years	Yes	N/A	Running out of money	email	Webinar January 17, 2026 1:00 PM
16					Miami	Florida	33165	Palm Springs Middle School	20+	1-3 years	Yes	Pension Plan	Taxes on DROP lump sum	email	Webinar January 17, 2026 1:00 PM
17					Orlando	Florida	32818	Office of Financial Regulation	20+	Within 1 year	Yes	Pension Plan	Running out of money	email	Webinar January 17, 2026 1:00 PM
18					Tallahassee	Florida	32303	Department of Revenue	20+	Within 1 year	Yes	Pension Plan	Taxes on DROP lump sum	email	Webinar January 17, 2026 1:00 PM
19					Gainesville	Florida	32601	MCPS Marion county public schools	20+	1-3 years	Yes	Pension Plan	Taxes on DROP lump sum	email	Webinar January 17, 2026 1:00 PM
20					Deltona	Florida	32738	University High School Orange City Florida	20+	Within 1 year	Yes	Pension Plan	Timing when to enter/exit DROP	email	Webinar January 17, 2026 1:00 PM
21					Gainesville	Florida	32601	Marion County Public Schools	20+	3-5 years	Yes	Pension Plan	Running out of money	email	Webinar January 17, 2026 1:00 PM
284					Jacksonville	Florida	32244	Duval County Public Schools	20+	More Than 5 ye	No, but considering i	Investment Plan	Running out of money	facebook	Webinar January 17, 2026 1:00 PM
285					Naples	Florida	34102	State of Florida	20+	More Than 5 ye	Yes	Pension Plan	Taxes on DROP lump sum	facebook	Webinar January 17, 2026 1:00 PM
286					Miami	Florida	33164	Broward Sheriff's office	20+	More Than 5 ye	No, but considering i	Pension Plan	Timing when to enter/exit DROP	facebook	Webinar January 17, 2026 1:00 PM
287					Sorrento	Florida	32776	Lake County Public Schools	20+	1-3 years	Yes	Pension Plan	Running out of money	facebook	Webinar January 17, 2026 1:00 PM
288					Trenton	Florida	32693	Dixie County Schools	20+	Within 1 year	Yes	Pension Plan	Taxes on DROP lump sum	facebook	Webinar January 17, 2026 1:00 PM
289					Lakeland	Florida	33801	Polk state college	20+	Within 1 year	Yes	Pension Plan	Timing when to enter/exit DROP	facebook	Webinar January 17, 2026 1:00 PM
290					Orlando	Florida	32839	Brevard County Tax Collector	20+	3-5 years	Yes	Pension Plan	Taxes on DROP lump sum	facebook	Webinar January 17, 2026 1:00 PM
291					Miami	Florida	33186	Mdcps	20+	3-5 years	No, but considering i	Pension Plan	Timing when to enter/exit DROP	facebook	Webinar January 17, 2026 1:00 PM
292					Homestead	Florida	33032	Miami-Dade	20+	More Than 5 ye	No, but considering i	Pension Plan	Job security / early retirement pressures	facebook	Webinar January 17, 2026 1:00 PM
293					Tallahassee	Florida	32304	Dept. of Corrections	20+	More Than 5 ye	Yes	Investment Plan	Running out of money	facebook	Webinar January 17, 2026 1:00 PM
294					Douglasville	Georgia	30135	DCF	10-20	More Than 5 ye	No, but considering i	Pension Plan	Taxes on DROP lump sum	facebook	Webinar January 17, 2026 1:00 PM
295					Orlando	Florida	32832	Orange County	20+	3-5 years	Yes	Pension Plan	Job security / early retirement pressures	facebook	Webinar January 17, 2026 1:00 PM
296					Miami	Florida	33165	Miami dade	20+	1-3 years	Yes	Pension Plan	Taxes on DROP lump sum	email	Webinar January 17, 2026 1:00 PM
297					Miami Gardens	Florida	33056	Miami Dade County	20+	3-5 years	No, but considering i	Investment Plan	Running out of money	facebook	Webinar January 17, 2026 1:00 PM
298					Charlotte	North Carolina	28201	Miami Dade county	20+	1-3 years	Yes	Pension Plan	Taxes on DROP lump sum	facebook	Webinar January 17, 2026 1:00 PM
299					Fort Myers	Florida	33908	Collier County Public Schools	10-20	1-3 years	No, but considering i	Pension Plan	Timing when to enter/exit DROP	facebook	Webinar January 17, 2026 1:00 PM
300					Sebring	Florida	33870	Highlands	20+	3-5 years	Yes	Pension Plan	Taxes on DROP lump sum	facebook	Webinar January 17, 2026 1:00 PM
301					Jacksonville	Florida	32256	FAMU	20+	1-3 years	No, but considering i	N/A	Timing when to enter/exit DROP	facebook	Webinar January 17, 2026 1:00 PM
302					Miami	Florida	33164	Hillsborough County BOCC Head Start/Early Head Start	20+	3-5 years	Yes	Pension Plan	Taxes on DROP lump sum	email	Webinar January 17, 2026 1:00 PM
303					Tallahassee	Florida	32305	Florida Department of Health	10-20	More Than 5 ye	No, but considering i	Pension Plan	Re-employment rules (6-month separation)	facebook	Webinar January 17, 2026 1:00 PM
304															

200 - 300 LEADS WERE GENERATED PER EVENT

LIMITING VARIABLE

The campaign appears to have solved for attention and lead capture faster than the downstream system solved for processing and conversion. The volume and specificity of leads suggest that follow-up capacity, close infrastructure, and advisor-side processing likely became the next limiting variable.

1	F	G	H	I	J	K	L	M	N	
	City	State	Zip	Employer / School District / Agency	Years of Service	Plan to Retire	Currently In DROP	Current FRS Plan	Biggest Concern	Message
1175	Council Bluffs	Iowa	51501	MIAMI DADE WATER & SEWER DEPT	20+	Within 1 year	Yes	Pension Plan	Taxes on DROP lump sum	
1176	Palm Bay	Florida	32909	Brevard	20+	Within 1 year	No, but considering it	Pension Plan	Timing when to enter/exit DROP	
1177	Orlando	Florida	32828	Dor	20+	Within 1 year	No, but considering it	Pension Plan	Taxes on DROP lump sum	
1178	South Miami	Florida	33143		1075749	46152	1-3 years	No, but considering it	Pension Plan	Running out of money
1179	Orange Park	Florida	32065	Duval	20+	1-3 years	No, but considering it	Pension Plan	Timing when to enter/exit DROP	
1180	Springfield	Florida	32404	ACPS	20+	More Than 5 years	No, but considering it	Pension Plan	Timing when to enter/exit DROP	
1181	Gainesville	Florida	32601	Levy	20+	3-5 years	No, but considering it	Pension Plan	Timing when to enter/exit DROP	
1182	Tampa	Florida	33603	Highlands county	20+	3-5 years	No, but considering it	Pension Plan	Taxes on DROP lump sum	
1183	Plantation	Florida	33317	Broward	20+	3-5 years	No, but considering it	Pension Plan	Taxes on DROP lump sum	
1184	Miami Gardens	Florida	33055	State Attorney's Ofc	20+	Within 1 year	No, but considering it	Pension Plan	Timing when to enter/exit DROP	
1185	Orlando	Florida	32839	Orange County sheriffs office	20+	1-3 years	Yes	Pension Plan	Re-employment rules (6-month separation)	
1186	Jacksonville	Florida	32244	Duval County Public Schools	20+	More Than 5 years	No, but considering it	Investment Plan	Running out of money	I look forward
1187	Naples	Florida	34102	State of Florida	20+	More Than 5 years	Yes	Pension Plan	Taxes on DROP lump sum	
1188	Miami	Florida	33164	Broward Sheriff's office	20+	More Than 5 years	No, but considering it	Pension Plan	Timing when to enter/exit DROP	
1189	Sorrento	Florida	32776	Lake County Public Schools	20+	1-3 years	Yes	Pension Plan	Running out of money	
1190	Trenton	Florida	32693	Dixie County Schools	20+	Within 1 year	Yes	Pension Plan	Taxes on DROP lump sum	
1191	Orlando	Florida	32839	Brevard County Tax Collector	20+	3-5 years	Yes	Pension Plan	Taxes on DROP lump sum	
1192	Miami	Florida	33186	Mdcps	20+	3-5 years	No, but considering it	Pension Plan	Timing when to enter/exit DROP	
1193	Homestead	Florida	33032	Miami-Dade	20+	More Than 5 years	No, but considering it	Pension Plan	Job security / early retirement pressures	
1194	Tallahassee	Florida	32304	Dept. of Corrections	20+	More Than 5 years	Yes	Investment Plan	Running out of money	
1195	Douglasville	Georgia	30135	DCF		46315	More Than 5 years	No, but considering it	Taxes on DROP lump sum	I'm looking t re
1196	Orlando	Florida	32832	Orange County	20+	3-5 years	Yes	Pension Plan	Job security / early retirement pressures	I need to know
1197	Miami	Florida	33165	Miami dade	20+	1-3 years	Yes	Pension Plan	Taxes on DROP lump sum	
1198	Miami Gardens	Florida	33056	Miami Dade County	20+	3-5 years	No, but considering it	Investment Plan	Running out of money	
1199	Charlotte	North Carolina	28201	Miami Dade county	20+	1-3 years	Yes	Pension Plan	Taxes on DROP lump sum	
1200	Fort Myers	Florida	33908	Collier County Public Schools		46315	1-3 years	No, but considering it	Timing when to enter/exit DROP	
1201	Sebring	Florida	33870	Highlands	20+	3-5 years	Yes	Pension Plan	Taxes on DROP lump sum	The date on th

Total leads from all virtual events

CORE INSIGHT

THESE CASE STUDIES DEMONSTRATES THAT HIGH-VALUE ADVISOR MARKETING IS NOT WON AT THE AD ALONE.

It is won by controlling movement between attention, trust, attendance, follow-up, appointment progression, and downstream business outcomes.