

CAPTURE LEADS



CREATE MEANINGFUL CALLS-TO-ACTION WITH DATAPOINTS

You've spent time and money on thoughtful content for your website and creating a presence on social media.

How can you take advantage of these efforts to capture leads?

Now you can use short, money-focused assessments as calls-to-action that gives prospects insights into their money mindset.

Each DataPoints Engage assessment is short, scientific, and designed to give insights back to prospects while also delivering the value of working with your firm.

It's a win/win scenario for your prospects and for your business.

GETTING STARTED IN THREE SIMPLE STEPS

1. ADD A LINK

Create a link on the DataPoints dashboard. Then embed it on your website or in a social media post.

2. REVIEW INSIGHTS

Review the insights about your leads directly from our dashboard.

3. REACH OUT WITH RELEVANT CONTENT

Follow up with relevant messaging depending on the prospect's results on the assessment.

A Library of Assessments

Use any of our Engage assessments on your website, in blogs, and in social media posts.

Spending Patterns
Financial Planning
Career Fit

Wealth Potential
Investor Composure

Create Post

Mill Financial
Public

Take this quick assessment to learn about your emotions when the market moves.

How's your investing composure?

MEASURE.DATAPOINTS.COM
When the markets move, how do you react?
Changes in the markets and portfolio values can impact ...

Each test link automatically posts an image and a call-to-action.

Try it free for two weeks:
datapoints.com/start