

# Super Seminar Tips & Tricks<sup>®</sup> by Frank Maselli

---

## Episode 4: Use a Power Opening & Close

---

The opening and close are two of the most critical parts of your entire seminar. Getting them right will go a long way toward increasing your appointment and conversion ratio. They each have big jobs to do!

*The opening gets people excited about the workshop.*

*The close gets them excited about the rest of their lives with YOU!*

The opening and close generally take between 3-5 minutes each. That may seem like a big chunk out of a 60-minute workshop, but they are very important, so don't skip or cut them too short.

### Open Big!

I like to do something dramatic that creates an air of urgency or excitement about the topic. Many of you have seen my "Dollar Bill Opening" and that's pretty dramatic. But it's tricky to pull off well. A more comfortable opening that might be easier for most advisors is based on the theme of: "Why Are We Here?" Specifically, why are we talking about taxes or estate planning or Social Security? What is unique about this moment in history that compels me to do this seminar and drives us to come together to deal with this critical issue?

Think about it...if there wasn't something important happening, there would be no need for a seminar at all. So you want the opening to reflect the gravity of the subject and importance of the timing. Let them know that they are in for a thrilling ride through a critically important subject and you're going to be different and better than any other seminar they've seen.

### What NOT to do

A big mistake I see many advisors make is opening with a commercial about themselves. Some call this their

"Why Story." Don't get me wrong. I love a great Why Story and a solid commercial. You will have a chance to do both. But the opening few minutes is the wrong time for them. The audience isn't ready to absorb your story at that point.

Make the opening about them and the challenge they're facing, not about you. After you have their attention and they're warmed up, then give them a one minute overview of who you are sufficient to establish your credibility as an expert on the subject. Then refer them to the handout kit to learn more about your team, your philosophy, your background, etc. But keep it tight!

*The more time you spend talking about yourself in a seminar, the less the audience will bond to you.*

It would be infinitely better to have your commercial, your personal CV and basic "Why Story" in the handout packet you give them when they arrive. (More about this later.)

### Use the "Never Before Opening!"

The "Never Before" theme can apply to almost any seminar topic, especially covering retirement issues. Basically it says that something is happening right now that is extremely rare and in fact, has never happened before! It's a very big deal and you need to be ready for it because it's absolutely going to affect you and your family for generations.

As advisors, we may not view retirement in that dramatic a way because we deal with it every day. But to each person in that audience, it's the biggest event in their life and they are terrified because they know they're not prepared! By tapping into that concern you capture their attention instantly and let them know that your presentation is going to truly help them.

## The Close is the grand finale!

The close is the very last thing you say to that audience before they walk out. It comes after the Q&A, the “Call to Action” and whatever appointment setting technique you may be using. It should be as powerful and emotional as the opening.

Done well, it will be that final push that compels them to come in and meet with you. It’s also the last message that lingers in their minds that tells them life with you on their team is a great idea.

One huge mistake I see many advisors make is ending the workshop with a Q&A session. The Q&A is important and you should do one, but it comes after the Body and before the Call to Action and the Close. Ending on the Q&A weakens the entire event! Some people will get bored and actually walk out! I’ve seen this a hundred times in advisor videos and it’s a disaster!

(Great presentations have a structure or a framework and follow a basic agenda. It’s like a lawyer building a case for the jury. The proper placement of each element within that structure is critical. You do have some flexibility, but if you want to maximize your business results, you want to stick pretty close to the proven path. We will be talking more about this.)

## Use “The Harbor Pilot Close”

I’ve built a seminar close that’s particularly valuable for any workshop related to retirement called “**The Harbor Pilot.**” It might help you a lot. Go to [Youtube.com/FrankMaselli](https://www.youtube.com/FrankMaselli) to view a complete explanation of it.

**The Harbor Pilot Close** is a story that will resonate with everyone in that room and differentiate you as an expert



who can step into their world at this critical time to solve the incredible challenges they’re facing.

It also does it in a very professional way without trashing their current advisor, which is never a good idea.

Check it out and let me know if you have any questions. Email me for the PowerPoint ([frank@maselligroup.com](mailto:frank@maselligroup.com)) It’s free!

## No “garbage dumps”

When it comes to openings and closings, my good friend and fellow workshop coach Deirdre Van Nest may have put it best. ([dvn@crazygoodtalks.com](mailto:dvn@crazygoodtalks.com))

*“The opening and close are the two most valuable pieces of real estate in your entire seminar.*

*You don’t put a garbage dump on your best properties!”*

**Perfection!**

The Harbor Pilot Analogy is different (and I think better) than the common Mountain Climbing Analogy that many advisors use.

One reason is because it stresses the need for a specialist (YOU) to take command and guide them into the harbor. With the mountain story, the same Sherpa guides them going up and coming down. That mitigates the implied need to change advisors at this critical juncture.

The second reason is that mountain climbing is a relatively short-term activity undertaken maybe once or twice a lifetime by very few people. Investing can be a 30 or 40 year journey for anyone!

I have no vested interest in which analogy you use, but HOW you use analogies in general needs to be carefully considered. A great analogy can significantly enhance the audience’s understanding and emotional connection to the topic.

A weak analogy that no one can relate to might have people wondering what the hell you’re talking about. Odds are no one in your audience will ever climb Mt. Everest. But they’ve all seen a boat!