INNOVATIONS

Modern Strategies for Top Financial Professionals

THE MASELLI GROUP

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The FEVER MODEL for Workshop Follow-up

How to Turn Attendees & No-Shows into Great Clients!

Appointments are the main measure of workshop success. But attendees cool off fast after an event. Delayed or ineffective follow-up wastes time & money and costs you clients!

Use the simple but powerful "FEVER Model" to keep people "hot" and maximize both the number and quality of those appointments from attendees and no-shows.

Frank Maselli is a former U.S. Army officer and a 38-year veteran of the Financial Services Industry. He has a Ph.D. in Psychology and is one of the nation's premier keynote speakers and business coaches. He has written three best-selling books and has trained thousands of advisors at nearly ever firm in the industry. He has also spoken to many thousands of investors and helped them build great relationships with their financial professionals.

Done well, there's nothing better than seminars for finding new clients. As a bare minimum, you should be setting and keeping one-on-one meetings with at least 50% of the room, but 75% or higher is totally possible with some advanced skills that we teach in great detail.

But the seminar itself is only the first part of the journey. Much of your success will happen after the event in the follow-up you do to keep people engaged and eager to meet with you.

To maximize your success, I recommend you use the **"FEVER" Model**®. FEVER stands for **Fast, Easy, Valuable, Emotional, Repeat!** Here's how it works.

F - FAST

Assuming you did a great workshop, people are "hot" for you, figuratively speaking. They like you, they believe you know your stuff and they are in the early stages of potentially trusting you to help them. That's exactly the mind-state you need to set appointments.

The problem is they start cooling off immediately! The minute they walk out of the room or click off the webinar, they're on to other things. Within 24 hours they may have completely forgotten they ever saw you. So you need to begin the follow-up process during the event and maintain contact in a variety of ways over the next several days and weeks...even months!

This is not sales pressure. I'm not talking about heavy-handed or annoying tactics. Your follow-up efforts should all be based on a continuing desire to provide exceptional value and reinforce the positive emotions you created during the event.

But you can't wait! Follow-up must start right away, which means you need to plan those activities well in advance. Don't do an event without a concrete follow-up plan in place and ready to launch immediately. It will be a waste of time.

Include the "no-shows"

You will very likely have people who said they wanted to attend but didn't. There are many reasons folks might not show up, so don't assume it's because they weren't interested. Life is hectic and something may have come up at the last minute. Although these folks missed the show, they were intrigued enough in the topic to respond, which means they probably have some concerns that you could still address with them. They are warm leads and you definitely want to give them a chance to ask some questions or partake of your wisdom in some way.

It's very possible to turn a no-show into a viable prospect by offering some sort of follow-up tool or informational give-away. If you recorded your session, you could invite them to watch the video. You could certainly skip the presentation entirely and offer them the chance for a personal appointment or the "mini-consult" at this point.

Follow-up activities

Good follow-up takes many forms depending on your abilities, time, and budget. In Stage 1, which happens within hours after the event, you need to call, text, or email every attendee. Or use a blended approach to maximize your chances of reaching them.

In Stage 2, which happens 1-3 days after the program, I like to use a hand-written note with some pertinent material or an article. This is where I would send the PPI (Personal Profile Interview) if I didn't already use it as part of my program.

If you're sending a note, it would be good to reference something they might have said on their "Evaluation Form." Maybe like this:

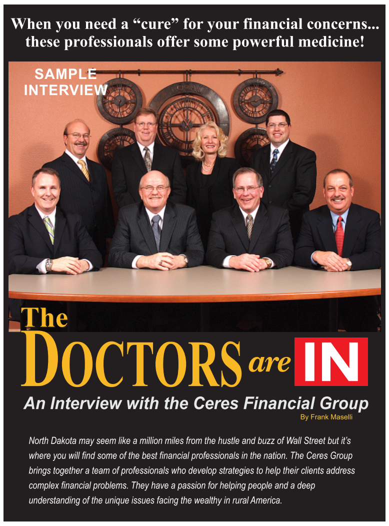
> THE MASELLI GROUP
>
> *Dear Jane & Bob!*
>
> *Thanks for attending the workshop last night! I noticed you mentioned that one of your concerns was "Maximizing Retirement Income." That can certainly be a challenge in today's economic environment and I have some ideas that could help. Why don't we set up a brief call where we could discuss this issue further.*
>
> *Best regards!*
>
> *Frank*
>
> *P.S. I enclosed a recent interview about my team that you might enjoy.*

Whatever you decide to do, don't delay. Simple tactics employed quickly are much better than more elaborate strategies used after the cool-off has taken effect. Focusing on some kind of clever or "perfect" follow-up may cause you to miss the main emotional window of opportunity. If more than a week or two passes without some form of connection, the heat you generated from the workshop will no longer be sufficient to inspire them to take action. So it's best to reach out while they remain mesmerized in the warm afterglow of your amazing performance.

Using 3rd-party follow-up

Having someone else handle your workshop follow-up has pros and cons. On the "pro" side, it makes you look important and part of something bigger than you might be. It's probably a lot

The PPI Personal Profile Interview



The **Personal Profile Interview (PPI)** is an incredibly powerful workshop follow-up tool that will significantly increase the number and quality of appointments you generate from your programs. It's totally unique, completely customized and compliance approved.

The PPI lets you tell your full story in a way that people love. They will read and re-read it cover to cover. And because it's a printed piece, it allows them to absorb your story at their pace...which is 100X better than the short commercial you're able to do during the workshop.

The more you talk about yourself at a seminar, the less people will like you. But you NEED to say something to build that critical bond. The PPI solves that problem in an amazingly effective way!

The PPI is a goldmine tool that has a myriad of additional uses. It's easy and fun to do and it works for individual advisors and teams as well.

The PPI tells your story with passion, gravity, and professionalism that cannot be duplicated by any other medium. Plus it's surprisingly inexpensive and changes or updates are free!

Go to **maselligroup.com/articles** and download the free PPI Guide to learn more.

more organized and efficient than you might be able to do yourself since you're busy running a business. So if you're looking for a completely turn-key service where you want to be set up with actual appointments, this could be a major home-run! I would just like to know exactly what is being done and who's doing it. And I might like to have some input to the process to be able to use some branded items in the case of direct mail or email.

On the "con" side, it's somewhat less personal. During the workshop, the audience bonded to YOU, not to some stranger they've never seen. So if I were going this route, I'd like to make it known at the workshop that the person doing the follow-up represents me. I might even introduce them to the audience in advance so there's less confusion when they call or email. And of course, using 3rd-party follow-up probably increases your cost per appointment, which might be an issue.

Tracking down workshop attendees takes patience and discipline. If those are your "unique abilities" then go for it. Personally, I would LOVE to have someone reliable, intelligent, and professional setting me up with qualified appointments. That's pretty much the definition of marketing Nirvana. Plus it supports my preferred image of being the star of the show. Frank Sinatra did not pack up the instruments or sweep the floors after a performance. So getting help at this critical point in the process is definitely worth considering.

How long should you follow up?

That's easy! There are only five reasons to fully stop your follow-up.

1. They become clients. **2.** They die **3.** You die **4.** They prove to be genuinely obnoxious people you would not want as clients. **5.** They're not "qualified" and have no need for your services and are unlikely to need you in the future. (See sidebar)

Basically, for most people, I will follow-up forever. I may put them on an extremely low-energy drip campaign, but if someone comes to one of my seminars, I rarely let them go completely.

There's a simple reason for this and you may have experienced it yourself if you've been doing workshops long enough. Things change! A prospect who says "no" today might find their current advisor has left the firm, or retired, or the relationship has soured. I can't count the number of times that someone has contacted me years after a seminar and said something like:

> **"Frank, I'm sure you don't remember us, but we came to your seminar a couple of years ago and our advisor just retired. They assigned our accounts to some new person we've never met and we were wondering if we could come see you."**

If you did a good seminar, you will be in the back of their minds for many years and it's a wonderful thing when something like that happens. So stay in touch and let time work in your favor.

E - EASY

Every presentation needs a simple and compelling Call-to-Action (CTA) that people can do without a lot of thought, planning or preparation. Ideally, you want them to take that first step on the relationship journey right there at the event. In a live program, that might begin by using a simple appointment card or evaluation form.

"Evaluations" are information tools

Most advisors seem to be using some kind of "evaluation form" at workshops these days. I use a slightly different format for mine which makes it more of an information gathering tool. Frankly, I'm not interested in the audience's opinion of my performance. At some point in your career, you know you're doing a fantastic job and don't need any reassurance. Meryl Streep and Al Pacino don't solicit acting notes from the audience.

Also, evaluations and audience feedback in general, can be misleading. Many of my coaching clients will tell me ***"Frank, I got back the seminar evaluations and they were all fantastic!***

Following Up with "Non-Qualified" Prospects?

You probably have some definition of what a "qualified prospect" means. Maybe it's a certain dollar amount of assets or some other numerical or demographic measurement.

If someone truly falls below that mark, one could argue that continued follow-up would be a waste of time, and I get your point. But consider this...

I believe everyone deserves to be treated with respect regardless of how much money they have. If I can stay in touch with you in a way that provides some value and takes very little energy on my part, I consider that a "mitzvah" – not literally an obligation, but rather a good deed based on simple kindness.

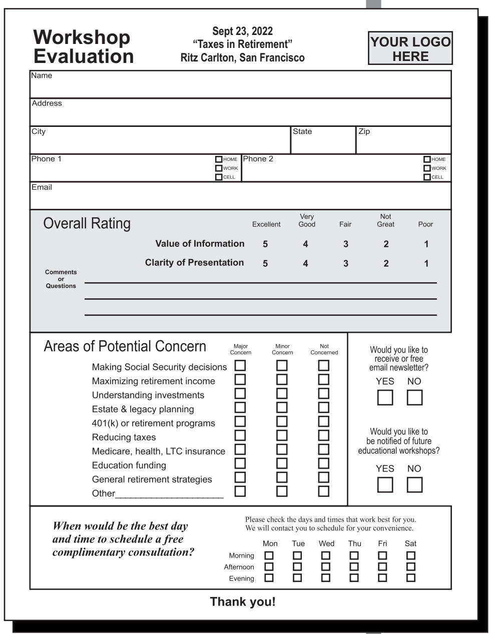
You could be rewarded for your effort. Hey, one lucky PowerBall ticket and you're the advisor they call. Sweet!

They might also be a source of referrals or help you make a connection to other, more viable prospects.

Also, if a seminar attendee says they have no money, it's possible they're telling you that because they did not bond to you at the workshop and they want you to go away. They know that crying poverty is the one sure way of getting you to stop calling them.

If you find that many of your seminar attendees "had no money" it could be because you're doing something that's rubbing people the wrong way at the workshop. It's a major signal.

People with no money generally do not attend financial workshops...especially without a free steak dinner. So I would take that as a sign of trouble with your program, not with the attendee list.



Workshop Evaluation

Sept 23, 2022
"Taxes in Retirement"
Ritz Carlton, San Francisco

YOUR LOGO HERE

Name

Address

City | State | Zip

Phone 1 (HOME / WORK / CELL) | Phone 2 (HOME / WORK / CELL)

Email

Overall Rating	Excellent	Very Good	Fair	Not Great	Poor
Value of Information	5	4	3	2	1
Clarity of Presentation	5	4	3	2	1

Comments or Questions

Areas of Potential Concern	Major Concern	Minor Concern	Not Concerned
Making Social Security decisions	☐	☐	☐
Maximizing retirement income	☐	☐	☐
Understanding investments	☐	☐	☐
Estate & legacy planning	☐	☐	☐
401(k) or retirement programs	☐	☐	☐
Reducing taxes	☐	☐	☐
Medicare, health, LTC insurance	☐	☐	☐
Education funding	☐	☐	☐
General retirement strategies	☐	☐	☐
Other________________	☐	☐	☐

Would you like to receive or free email newsletter? YES ☐ NO ☐

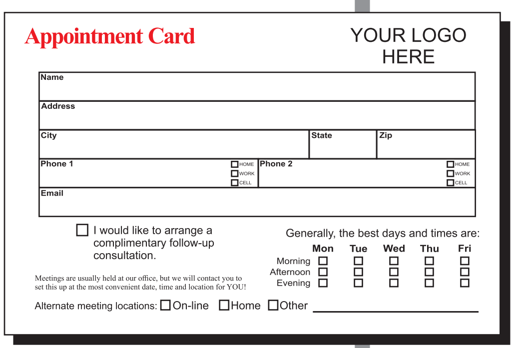
Would you like to be notified of future educational workshops? YES ☐ NO ☐

When would be the best day and time to schedule a free complimentary consultation?

Please check the days and times that work best for you. We will contact you to schedule for your convenience.

	Mon	Tue	Wed	Thu	Fri	Sat
Morning	☐	☐	☐	☐	☐	☐
Afternoon	☐	☐	☐	☐	☐	☐
Evening	☐	☐	☐	☐	☐	☐

Thank you!



Appointment Card

YOUR LOGO HERE

Name

Address

City | State | Zip

Phone 1 (HOME / WORK / CELL) | Phone 2 (HOME / WORK / CELL)

Email

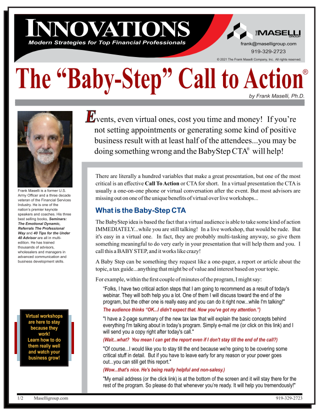
☐ I would like to arrange a complimentary follow-up consultation.

Generally, the best days and times are:

	Mon	Tue	Wed	Thu	Fri
Morning	☐	☐	☐	☐	☐
Afternoon	☐	☐	☐	☐	☐
Evening	☐	☐	☐	☐	☐

Meetings are usually held at our office, but we will contact you to set this up at the most convenient date, time and location for YOU!

Alternate meeting locations: ☐On-line ☐Home ☐Other ________



INNOVATIONS
Modern Strategies for Top Financial Professionals

The "Baby-Step" Call to Action®

by Frank Maselli, Ph.D.

The **"Baby Step CTA"** is a unique benefit of virtual programs and it can radically increase the success of your events. Download the white paper from **maselligroup.com/articles** or email me at frank@maselligroup for a copy.

People really loved my presentation!."

So I ask: ***"Did you set any appointments?"***

"Not yet...but it went really well."

I'm sorry folks, appointments ARE the evaluations!

People will almost always say nice things on an evaluation form, so while positive comments feel good and should give you some confidence, they're just too common to be of any value. Negative comments, however, could actually be more helpful in improving your performance. But those are pretty rare unless you're really screwing up badly. Overall, don't focus on audience comments. Better to minimize the evaluation portion and gather some good data you can use in your follow-up.

Customize your forms

At left is a simple Evaluation Form and Appointment Card that I use. These can be customized with your logo and the date, topic and location of the event so you remember where they came from. That will help you keep track of your workshops because they might all start blending together in your mind after a while.

Whatever type of form you use, make sure they're easy to read and fill out. Leave plenty of space for name, address and emails, which can be pretty long. I use a lot of check boxes and multiple choice questions rather than "fill-in-the-blank" essays. The goal is to make it fun and quick to reply.

Pave the way for follow-up

Usually, the formal Call to Action (CTA) comes at or near the end of the event. But you want to strategically infuse the body of the presentation with stories and examples that illustrate the tangible and emotional benefits of follow-up action. For example, you might inject a story that starts with the phrase:

> **"During our last seminar, there was a couple sitting in the front of the room who were taking furious notes. I could tell they were listening carefully and seemed to be really engaged. When we followed up with them the next day they said they wanted to come in right away because they had a very difficult problem and needed serious help fast." (The story continues with more specifics.)**

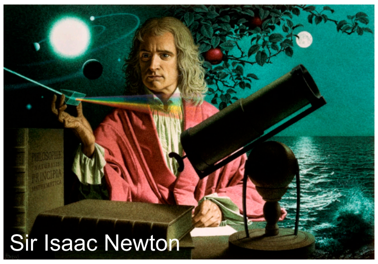
That intriguing story alludes directly to a "next step" in the process and suggests something good is going to happen to them after the event. It lets people know that the relationship doesn't end with the seminar. Don't do this too often or it becomes too salesy. But sprinkling one or two examples of successful post-workshop encounters into your program will lubricate the follow-up process and get them comfortable knowing that many others have done this in the past and seen great benefits as a result.

Let them take a "Baby Step"

With virtual programs, you have a chance to use a unique strategy that cannot be done in a live event. I call it the **"Baby Step CTA."** This is an action that people could do immediately on their phone or their second screen while they are watching your program. It dramatically increases the business results from your web-based events and may be one of the major benefits of webinars. People who take the Baby Step are 4X more likely to set an appointment...it's that powerful. Check out my white paper on the Baby Step CTA. The link is on the side.

Don't pitch too early!

Obviously, the Call to Action is a critical part of any presentation. But many advisors are making



Sir Isaac Newton

Use the "Mini-Consult"

Isaac Newton's First Law of Motion paraphrased loosely says, **"A body at rest tends to stay at rest unless acted upon by an external, unbalanced force."**

Getting someone to set an appointment is like trying to roll a huge boulder on a flat surface. The hardest part will be that initial force just to get it in motion. Once it's moving, the amount of force needed to keep it moving is actually reduced.

The Mini-Consult is one example of a "Baby Step" that gets people to make the emotional leap from being an anonymous workshop audience member to engaging in a one-on-one, personal conversation.

It's a 15-20 minute phone or Zoom call where the prospect has a chance to ask any questions they might have from the workshop or to explore any personal issues in somewhat greater depth.

It's a lot less risky and intimidating than a full appointment, but it gets them moving ever so slightly. Once they've taken this small step, it's much easier to keep them moving down the path to a relationship.

The Mini-Consult is also a low-risk activity for you. After all, you don't know yet if these folks are even a good fit for you, so why offer a full one-hour appointment until you have some more information both about their needs and their personality.

Your main CTA could still be the full 1-hour meeting. But the 15-minute Mini-Consult is a great interim step for anyone who is uncertain or hesitant.

BTW...it never lasts just 15 minutes. Once they start talking you may find it turns into a full appointment quite organically...which is great!

what I believe is a gigantic mistake by doing it way too early in the program. Often I see this happen within the first few minutes of the workshop, even right in the introduction! You probably know what I'm talking about. It sounds something like this:

> **"Folks, tonight is the first part of a two-part workshop. The second part will be a private, one-on-one meeting where we will go over your financial situation and discuss specific ideas that can help you...yadda, yadda."**

In my opinion, this is extremely unwise and evokes some very negative emotions. As proof, just think of the seminar as a "blind first date." You're meeting these people for the very first time. They don't know anything about you, nor you about them. But instead of letting the experience unfold comfortably and at a relaxed, natural pace, you're rushing to something they're simply not ready for yet. Here's how it sounds in the audience's mind: *(Modify the genders as you wish.)*

> **"Gosh Betty, I'm very glad you agreed to have dinner with me tonight. I know we've never met before, but I've really been looking forward to this evening. By the way, tonight is actually the first part of a two-part date. The second part will be next Friday, one-on-one in my apartment. There we will both fall madly in love and start picking the names of our children. I'm thinking four kids should be fun!"**

What you're doing here from a psychological standpoint, is pitching the committed "marriage" part of the relationship before anyone knows if the first date is a success. You're trying to sell them on the main CTA before you've earned that right or given the audience a chance to bond to you emotionally. I just think it's crazy!

Also, by front-loading the commercial in this way, you're making it clear to everyone that you're doing this program mainly to make a sale, not to educate them. If I were in the audience, my immediate reaction would be very negative and resistant. **"Sorry pal...I don't think so!"**

Wait until the audience is solidly under your spell before you even mention the second date. It usually happens toward the end of the program after you've given them some extraordinary value and wisdom. With experience, you will be able to sense when the time is right. There's a moment when you will just feel they're ready to take that next step in the relationship. You might even have someone raise their hand and ask the magic question:

> **"This is fantastic information! HOW CAN WE WORK WITH YOU?"**

THAT'S when you discuss the second date, when they are at their peak enthusiasm. To leak the appointment too soon undercuts the emotional intensity of the entire event.

Look, if you're doing the front-load thing and you're consistently setting appointments with 50%-75% of the room, then keep going. You evidently have some magical power that transcends my understanding. But if your numbers are lower than that, please consider cutting out the whole *"first part of a two-part seminar"* stuff. I would bet big money that it's hurting you.

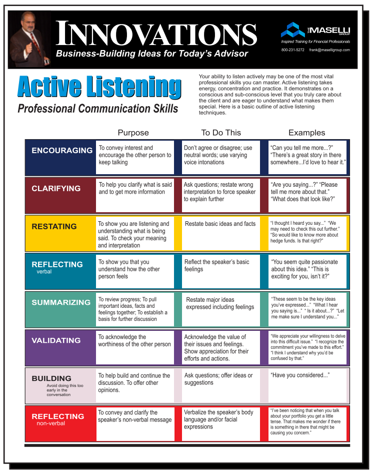
V - VALUABLE

The most effective and valuable follow-up process offers people two main things: **1)** A chance to tell their story and be thoroughly heard. **2)** Some real value for keeping that appointment. You want them to see you as someone who cares deeply about their success and well-being. And you want them to believe that by meeting with you something wonderful is going to happen to them. They are going to leave with some knowledge, a basic strategy, a broad approach, or a few excellent ideas that they can use to improve their financial life.

Shift communication gears

Follow-up appointments require you to make a major transition from talking to listening and many advisors struggle with this. They do way too much talking in a meeting and the prospects just sit there wondering if they're ever going to get a chance to ask a question or tell their story.

Talking more than 10% of the time on an appointment is the kiss of death! So how can you



INNOVATIONS
Business-Building Ideas for Today's Advisor

THE MASELLI GROUP
Inspired Training for Financial Professionals
800-231-5272 frank@maselligroup.com

Active Listening
Professional Communication Skills

Your ability to listen actively may be one of the most vital professional skills you can master. Active listening takes energy, concentration and practice. It demonstrates on a conscious and sub-conscious level that you truly care about the client and are eager to understand what makes them special. Here is a basic outline of active listening techniques.

	Purpose	To Do This	Examples
ENCOURAGING	To convey interest and encourage the other person to keep talking	Don't agree or disagree; use neutral words; use varying voice intonations	"Can you tell me more...?" "There's a great story in there somewhere...I'd love to hear it."
CLARIFYING	To help you clarify what is said and to get more information	Ask questions; restate wrong interpretation to force speaker to explain further	"Are you saying...?" "Please tell me more about that." "What does that look like?"
RESTATING	To show you are listening and understanding what is being said. To check your meaning and interpretation	Restate basic ideas and facts	"I thought I heard you say..." "We may need to check this out further." "So would like to know more about hedge funds. Is that right?"
REFLECTING verbal	To show you that you understand how the other person feels	Reflect the speaker's basic feelings	"You seem quite passionate about this idea." "This is exciting for you, isn't it?"
SUMMARIZING	To review progress; To pull important ideas, facts and feelings together; To establish a basis for further discussion	Restate major ideas expressed including feelings	"These seem to be the key ideas you've expressed..." "What I hear you saying is..." " Is it about...?" "Let me make sure I understand you..."
VALIDATING	To acknowledge the worthiness of the other person	Acknowledge the value of their issues and feelings. Show appreciation for their efforts and actions.	"We appreciate your willingness to delve into this difficult issue." "I recognize the commitment you've made to this effort." "I think I understand why you'd be confused by that."
BUILDING Avoid doing this too early in the conversation	To help build and continue the discussion. To offer other opinions.	Ask questions; offer ideas or suggestions	"Have you considered..."
REFLECTING non-verbal	To convey and clarify the speaker's non-verbal message	Verbalize the speaker's body language and/or facial expressions	"I've been noticing that when you talk about your portfolio you get a little tense. That makes me wonder if there is something in there that might be causing you concern."

Active Listening is a wonderful skill set that will enhance every aspect of your professional and personal life. There are thousands of books and web pages devoted to this process, but here's a very simple one-pager that will give you the basics you need to get started. Download it from **maselligroup.com/articles**.

Chances are you have something like this already, but if not, create a simple tool that you can provide people as part of the follow-up to your workshop.

Even something as one-pager branded with your logo on top makes you look very professional.

It doesn't need to be overly elaborate or complex. Nor should it take a lot of time or detailed information to develop. It's just something you can offer as part of your follow-up process.

The real work and science of financial planning happens only after they become clients. But a tool like this says that you are a creator and a thought leader. It can be an intriguing precursor of your full capabilities. Think of it as the tasty appetizer before the main course.

downshift into listening mode? I use five primary skills in an appointment including The Psychological Interview,® Active Listening, some basic NLP techniques, the Kolbe A Index®, and my favorite one...SILENCE! When you really want to get to know someone...shut the hell up! It amazes me what people say after ten seconds of pure silence.

These techniques are too detailed to go into here but they're available on my website or in my training programs. See the sidebar at left for more information. But whatever you do, get out of presentation mode. The less you say, the better your results will be. Tell them that this is THEIR time to talk...and you are dying to listen. Watch what happens!

An assessment tool of some kind

It's very helpful to offer some tool or take-away that is both unique and branded to you if possible. Obviously, the tool would depend on your topic. So for a tax seminar, you might use the "Tax Map" or the "Tax Analyzer." For Estate Planning, you might use the "Family Love Letter®." In a broader retirement workshop you might call it "The Retirement Income Survey," or "The Social Security Review," or even the famous "Bucket Plan®!" You get the idea.

Most seminars you buy will come with a tool like this that allows you to provide valuable information and at least a cursory analysis on the appointment. But if not, you might want to create one for yourself. It's not hard.

In my seminar on Global Investing and I offer a "Global Holdings Survey" where I examine their portfolio and determine the percentage of the earnings of the various stocks that come from foreign operations. Other tools I've developed include a "Mutual Fund Overlap Report" or an "Interest Rate Risk Analysis" which is particularly useful in a rising rate environment.

These tools are intended to address one of the problems or challenges you mentioned in the workshop. Having something specific to address those concerns will increase your appointment ratio substantially. And if you create it and brand it yourself, even better!

Give away the store...or hold back?

How much "value" can and should you offer on a follow-up appointment? Some advisors give a whole bunch of information almost to the point of a full-blown financial plan. Others hold back everything in fear that the prospect will take their ideas and do it themselves or go elsewhere.

My general advice is to give people enough information and wisdom to cement the impression that you know what you're doing and are able to help them solve their problems. But reserve the actual solutions until they become clients.

First, if someone takes your ideas and uses another advisor, you dodged a bullet. That's not the kind of person you want to be working with anyway. The good news is that most people won't do that. And within one appointment you should be able to assess the "quality" of that prospect sufficiently to determine if they're a DIY'er or flight risk. *(see "The Chop Saw.")*

That's one reason I recommend the first appointment be much more psychological than financial and why The Mini-Consult" is so effective. You want to have a sense about who these folks are before you commit time and effort to the relationship.

Other advisors include a very detailed analyses and a full-blown plan. But that could be undermining your professional value. For that level of effort, the prospects need to become clients by either writing a big check or transferring their accounts to my control. I might outline my preliminary thinking, but only after they join the team will I create anything that's customized.

In that early stages of follow-up remember YOU are the only "product" you need to "sell." When you do that effectively, everything you offer or create for the client will be eagerly accepted. If you fail to sell yourself, the products or recommendations will always be questioned and second-guessed, and that's a short road to Hell. The prospect's decision to work with you must be based on you, your team, your philosophy and your process...NOT on any specific plan or program you

No Strings Attached "The Chop Saw"

I recently had a chat with a carpenter who was doing some work on our house. I asked him about buying a chop saw to do a small project I had in mind.

He listened carefully, asked a few questions and gave me some general advice. But the next morning he came back with a detailed written plan for my entire project!

In it, he told me exactly what to buy, the blades I would need, the type of wood to get, how much to pay, how to join the edges together, the best way to finish it, and the time it would take me.

He was beyond generous with his time and expertise and he left me feeling thoroughly excited and totally prepared to get started on my project!

So I hired him to do the job!

Why? Because I *thought* I was looking for information. But sub-consciously, what I really wanted was a professional!

Serious people with money are not going to take your ideas and do them on their own. They know they need professional help and they're willing to pay for it.

By giving value with no strings attached, intelligent people will realize that they will be infinitely better in your hands.

That's not logic...it's pure emotion!

Share as much wisdom and insight as you can for free, and watch what happens. People will bond to you more quickly and deeply than you would have thought possible. You will separate the cream of the crop and the quality clients will rise to the top.

might eventually put in place for them.

The great news is that if they liked you enough to come in for an appointment, you already made a gigantic portion of that "self-sale" already. If you're not setting many or any appointments, something is going wrong...and you need to find out why.

Crystalize your "value proposition"

As a life-long Nick Murray fan, I would never base my value on my ability to predict which "raindrop" makes it to the bottom of the window fastest. Your value as an advisor is not the ability to promise improved investment performance. Your value is clarity, wisdom, calm command authority born from deep study and decades of "combat" experience. All of which leads consistently and reliably to better client outcomes over time. Actually, that's mine...what's yours?

Once you have it, are you able to articulate it in a way that resonates with your prospects both during the workshop and in the follow-up process? Does the workshop highlight or demonstrate your value, and how are you able to make it personal in follow-up? These are major questions I believe you need to answer in detail before you can get really effective at seminars. If you would like to test it out on me, reach out and set up a call. I'd love to hear what you're saying and doing to convey just how critical you truly are to the client's success.

E - EMOTIONAL

In all my training programs I stress the critical importance of understanding client emotions. The great psychoanalyst Carl Jung summed up the goal of all professionally persuasive communication when he said:

> **"Emotion is the chief source of all becoming conscious. There can be no transforming of darkness into light or of apathy into movement without emotion."**

Before you can get someone to pay attention to anything (darkness into light) or take action on anything (apathy into movement) you must get their emotions involved.

Your follow-up process, and the entire journey from prospect to client, must be based on emotions. Constantly ask the question: ***What do I want people to FEEL as we move along that path together?*** Smart, powerful, brave, safe, nurtured, proud, loving, joyful, fear? Learn to think about your actions in terms of the feelings they will evoke in others and begin to control that process if you want to maximize the success of the relationship and frankly, of your career.

So what do I want them to feel? Well, let's ask...

> **"Tell me something...how fantastic are you both going to FEEL when you know your retirement income is totally secure? Isn't that going to be wonderful?"**
>
> **"How good it will FEEL to know you never have to worry about the volatility of the stock market anymore?"**
>
> **"Won't you FEEL proud to know your grandchildren have college paid for by your work here today?"**

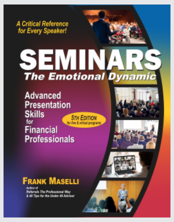
Negative emotions are also a potent force for encouraging change.

> **"Do you ever FEEL worried that you don't know what's happening in your 401k?"**
>
> **"Does it FEEL frustrating that your advisor never returns your calls."**

You get the idea: focus on feelings, not on numbers. People don't understand 95% of what we do in our profession and they don't *want* to understand. What they want are the feelings they get when someone they trust is in control and steering the ship. When their head hits the pillow at night they're not dreaming of Sharpe ratios or hedging strategies. They just want to feel safe!

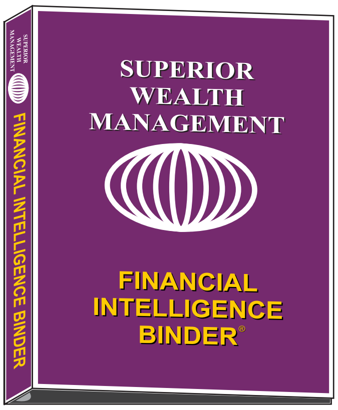
There are **9 Critical Emotions**® you want to hit in every presentation. You also want to reinforce

The 9 Critical Emotions®



- Like
- Understanding
- Respect
- Confidence
- Happiness
- Fear
- Action
- Change
- Enthusiasm

Follow-up with The Binder Strategy®



The Binder Strategy is an extremely effective drip campaign exclusively for top prospects where you send a customized three-ring binder, like the example above.

Then you drip on them every two weeks like clockwork so they see your name and get something valuable that goes right into their binder. After a certain amount of time has passed, you reach out to them and set up an appointment. There's more to it, but that's the essence.

I use The Binder Strategy only for top people because it takes some time and effort. But it's totally unique, very upscale, cheap as dirt, compliance approved and yields amazing results with pretty wealthy people.

What more could you ask for?

***Come to Lifeguard Academy. Look for an invitation or check out my website to learn more!**

these throughout the follow-up process. They're discussed in my book in great detail but I like to reiterate two of those emotions in the PowerClose like this:

> **"Folks, you're going to leave that first appointment feel very happy and smart. Happy because you took a great first step in securing your family's financial future. And smart because whether we decide to work together or not, you will have some ideas you can use to improve your entire financial situation."**

R - REPEAT

The final stage of the follow-up process is to repeat it...forever! If someone attends your workshop, never let them go, barring the exceptions noted earlier. Put them on a drip campaign of some kind ranging from very low effort to high intensity. Obviously the greater the potential you perceive from the prospect, the more time and energy you're willing to commit to perpetual follow-up. I usually address this idea of follow-up with them during the PowerClose segment of the workshop by saying something like this:

> **"Folks, I just want you to know how much I appreciate the commitment and the effort you made to come to this event tonight. You all have a lot of more enjoyable things you could be doing, but you took the time to learn some very important concepts that will absolutely help you and your family for many years to come. So I applaud you and I would like to make a similar commitment to all my seminar attendees. Simply put...I will never let you go!"**
>
> **"That doesn't mean I am going to bother you for the next ten years or come to your house and stand on your lawn. What it means is if you EVER need help, I will be there for you!"**
>
> **"Some of you have advisors you love right now and I respect that relationship. But things can change very quickly in the financial industry. If your advisor retires or changes firms or the relationship goes south for some reason...or you just feel the need for an objective second opinion – reach out to me anytime day or night and I will be there for you!"**

That's an effective and professional way of expressing your ongoing commitment to them and for justifying some level of contact going forward. People would never have come to the workshop if they weren't searching for something. The hour they spent with you, plus the ongoing communication over time, is probably a lot more than they're getting from their current advisor. So be patient and persistent. I look at it like this...you're not a salesperson,

You're a Lifeguard* saving a drowning family!

An aggressive, persistent, determined, forceful "salesperson" is a loathsome annoyance!

An aggressive, persistent, determined, forceful "lifeguard" is a HERO!

If you truly believe you have something valuable to offer people and can positively impact their lives by your skill and expertise, you NEED to get them in your lifeboat. Whatever it takes for however long needed to do that is worth the effort. When you start thinking of yourself differently, and realize the amazing power you have to do good for people...your intensity and passion take on a bold, new dimension. So stop selling and start saving lives...because that's truly what you do!

In Conclusion...

Workshop follow-up might not be as much fun as delivering an exciting program, but it's absolutely the key to your business success. Think seriously about your follow-up strategy and put those plans in place before you step in front of that audience. As always, if you need anything, reach out anytime. Clearly I've given this whole subject a bit of thought and I'd love to help you!

Frank