

Episode 301 - How to Avoid 6 Common Mistakes When Presenting Online

Thank you for attending today's episode of Money Script Monday. My name is Sara Sullivan and I am the licensing and contracting manager over here at Life Pro Financial Services. I have been with the company for 20 1/2 years and I've been doing licensing and contracting for around 12 of those years. So whether you've been with us for a while or are a brand new advisor, hopefully I can bring some of my knowledge and experience to you in a clear and concise manner.

Today we're going to talk about 6 common mistakes advisors make when presenting online and how to avoid them. Pretty relevant as for those giving seminars, the online method became their lifeline after COVID. During my 20 year tenure here at LifePro, I've had the opportunity to both give many presentations and witness some of the best presenters in our industry wow me with their expertise. Now I will say that it's definitely a bit of pressure to literally put myself on stage and teach this topic to you whilst you're witnessing and probably judging online, but one of my favorite things to do is to challenge myself so I'm more than up for this one. As is with pretty much everything that we do at LifePro, our entire function is to do the leg work for you, so hopefully the findings I've collected will free up a bit of your time to do what you do best, and that sell.

Let's just get right into it. Here are 6 most common mistakes when presenting online and some tips and tricks to avoid them. Mistake number one, failing to engage emotionally. You risk losing your audience when you just state the facts, even in a business setting. No presentation should be devoid of emotion, no matter how cerebral the topic or the audience. Speak to people's hearts as well as their minds. Look for ways to add emotional texture to your exhibits, data, proofs, logical arguments and other analytical content. Try opening with the story your audience can

relate to, for example, or include analogies that make your data more meaningful.

Every year when we have expert speakers at both our LifePro Summit and our University to kick off the selling season, every single one begins with a captivating story. That relatable story is also used at the end of the presentation to tie all the contents together and leave the audience feeling like they have to know more.

Mistake number two, trotting out some tired visuals. Nothing gets someone to the point of dozing off like a visual cliché. If you want your presentation to stand out in a good way from the others your audience has seen, brainstorm lots of visual concepts and then throw away the first ones that come to mind. Those are the ones that occur to everyone else too. That's why you've seen them a million times in other people's presentations.

Generate several ideas for each concept you want to illustrate, and you'll work your way toward originality. Before starting your online presentation, you must be fully aware of how you're going to pop up on camera and how your background is going to work in your favor. As the camera is solely focused on you, what stands behind you must be an organized, presentable space. Many people choose to sit behind a sleek and heavy desk or in front of bookshelves as these props can provide a scholarly look. It's quite popular and effective to have family photos in the background as they're more than relatable or potted plants can usually improve the look of any room. Make sure that your surroundings stand out in the best way possible and enhance your aesthetics, but don't distract or get in the way of you - the star of the show. Remember that you are also a visual, so be sure to dress the part like bed head or wearing a t-shirt with a beer brand on it is probably not ideal, right?

Mistake number three, asking too much of your slides. PowerPoint can be a great tool, but know what you're trying to accomplish with it. Problems

crop up when you place too many elements in a slide deck. If you cram in all the points you're going to cover so you won't forget anything, you'll end up projecting entire documents when you speak. No one wants to attend plodding read along. It's boring, and people can read more effectively on their own anyway, so don't try to spell everything out bullet by exhausting bullet. Keep your teleprompter text hidden from the audience's view and in the notes field and project only visuals that reinforce your ideas. Having no clear call to action or disorganized information that has no logic or order to it is one of the deadliest mistakes you can make, so it's best to avoid even risking that at all costs. When I was doing my research on this, I read a blurb about giving your thoughts and ideas the grandmother test. If your grandmother wouldn't understand what you what you're talking about, you need to rework and simplify your message.

Mistake number four, focusing too much on facts and not some storytelling. This one goes hand in hand with mistake number 1. Rattling off statistic after statistic or pointing to endless charts and graphs is a surefire way to disengage an audience. Those aides can be fabulous accompaniments, but just be sure that they are 100% relevant and not overdone or overused. Purchasing life insurance and annuities isn't simply buying a product off a shelf, as you know, so appealing to and engaging emotions of potential customers is always in your best interest.

Mistake number five, reading directly from your PowerPoint presentation. When you read directly from the PowerPoint, it becomes difficult for an audience to stay engaged. When you read directly from the PowerPoint presentation, your body language is not open to the audience and it means that you aren't engaging with either the material or your listeners. If you spend time in preparation and writing out what you will be saying, you can speak directly to the audience and portray confidence in your brand. By purposefully making eye contact with the camera, you are connecting with those who are listening to you.

Mistake number six, and in my opinion the most catastrophic bungle on the entire list, is a failure to prepare. Know your audience, prepare and rehearse as many times as it takes because that is the absolute key to confidence. Confidence shines through across the interwebs, and that's consistently the attribute that encourages clients to buy. Triple and quadruple check to make sure all of your systems and programs are in working order. Also, be prepared for a multitude of situations that could go wrong and have a plan of attack for each.

Familiarize yourself with the online platform you're using and the less technically savvy you are, the more time should be spent on this aspect. I say that very humbly as my personal technological smarts are about a 2 out of 10, so I'm grateful to have the support system I have here at LifePro helping me to ensure that everything goes off without a hitch. Lastly, try your best to not go over the allotted time. The worst is to rush or fumble through a conclusion when really, that's the portion that you want to affect the audience with most. It's impossible to leave that long lasting impression when the close is abrupt. There's also nothing worse than a presentation that seems like it'll never end. Keep in mind that your audience will never scold you for ending early as well.

So with that, just to pull all of these recommendations and hopefully motivations together, remember that practice makes perfect and try not to be too critical of yourself as you put these items into play. With each attempt, you'll improve, and my hunch is that after a slight period of implementing these tips into your next online presentation, you will be really glad you did. So that's all for today. I hope that you were able to take away some worthwhile tidbits from this session. And as always, if I can be of assistance with anything that you have questions about, please e-mail me at ssullivan@lifepro.com or ext 3265. I encourage you to lean on us. That is exactly what we're here for and that's what we love doing. So have a great day and thank you for your business.