

# Episode #350 – SMARTER Strategies for Elevated Workshops

Welcome back to another episode of Money Script Monday. My name is Gabriel Lindemann. I'm the Director of College Planning at LifePro Simplicity San Diego, and it's my honor to be here with you today. Before we get started, it is officially college playing season. Now is the best time of the year. My marketing team and I are doing so many campaigns, and it's going marvelously.

What we will discuss today can be cross-applied to any LifePro Simplicity San Diego seminar. When you see this, you might be saying, "I'm not a College Planner," this still applies because, at the end of the day, it's about getting in front of people, making appointments, and building relationships. With that in mind, we're doing some slightly different, smarter strategies for elevated workshops. What does that mean? It means how to make your seminars and workshops a grand slam success.

Let's start with "S." Share your founder story. You might say, "I don't know what a founder story is," but that's a bigger problem. Please call your immediate ADC and say, "Hey, I need to find out about this founder story. I need to find out how I qualify to go to," in my opinion, "one of the best trainings in the country, the Simplicity AST Training." It is marvelous. Jason Jenkins hosts it, and if you came to LifePro University, you saw him speak, and he's the real deal.

The founder's story, basically, is a glorified elevator intro speech. It's who you are and why you make a difference. For example, many people know my founder's story for college planning goes back to my father passing away. I didn't have opportunities, but I had an excellent teacher. I realized I wanted to get more involved in this, and I've been doing it for the past 15-16 years and love it. That's why I want to help a lot of families. But

that's my abbreviated founder story; we need to work on what your founder story is.

When you start the presentation, you say, "Thank you, everyone, for coming. I want to tell you why we're here. We're here because I want to make sure everyone gets into college. I want to ensure all my students can pay for private schools while only paying state school prices." Then you wow them from there on out. That's "S."

Now, we will move over to the "M" for maintaining attention with concise content. This is very important. Whether it's a College Planning, Social Security, or retirement workshop, it doesn't make a difference. You need to have good information, but more importantly, you need to be able to tell stories with that information. The best seminars and workshops do this every three to five slides. They break it up and tell a funny story. People tell stories; that's how we communicate.

One of the most famous professors out there is Walter Fisher. He's a professor at USC, and he talks about the narrative paradigm that we, as humans, communicate through telling stories. In your presentation, if you see people put their heads down, not paying attention, or looking at their phones, break it up. Tell a story and relate to the audience. Remember, you can work with your ADC to develop some good stories. That's what I do all day, every day, and I'm sure every ADC within Simplicity would love to be your personal coach and help you with that; I know I would.

For "A," actionable next-step reminders. If you're talking about college planning, they have guidelines. They have dates. There are fictitious ones that are made up, saying, "Hey, you need to roll over your account because you know the markets are going to crash tomorrow," we don't know if the markets are going to crash, but I see a lot of people out there write about that. But, in college planning, the schools get the deadlines.

Every year, you must update your FAFSA and CSS profile. You have to make sure your file is correct. You have to make sure you know what

schools you are applying for. There are all these deadlines the schools put out there that you must follow. You need to remind the families and say, "Don't forget if you're a freshman, you have a little bit more time, but if you're a sophomore or junior, we have a lot of stuff to start working on. We have to start test prep and school selection. We got to get you working with our counselors today, not tomorrow." You need to remind them throughout the whole presentation, tell stories about why they need to be in front of you, and make an appointment sooner rather than later.

Let's transition to the "R" and repeat your key messages. It's about getting kids into school. This is like your founder's story, but you bring it all the way through. If your message is "We will get your kids into school, and we will make it affordable. We're going to use money and put it from your left to your right pocket while controlling everything and maintaining maximum financial aid," then you should sell that story throughout the whole time. Don't just bring it up in one nice, beautiful PowerPoint slide. That's not enough. If it's a significant slide, talk about it and let it be a theme of your whole presentation.

I've attended 20, maybe 30, college planning seminars this season. The best seminars tell the story, repeat it, and make sure it's the foundation of the whole idea, going from start to finish.

"T," tie the ending into the beginning. I'm a big believer in what we call the intro in the speech world. The founder story would be your intro, and the ending would be your zinger. The best public speakers in the world know that you start with your intro and close with your intro. Again, that's how powerful it is.

"Today, I want to let you know that if it wasn't for my father passing away, who knows what would have happened? I had some opportunities, I lost some opportunities, but I realized how important it is to get into college and make it affordable. I didn't have those opportunities because

my dad unfortunately passed away from cancer too young, but I want to make sure all my students, friends, and family have those opportunities."

I start with my founder's story, and indirectly, I end with my founder's story. That's why people want to work with you. That's why it's a relationship. When hosting a seminar, you're not trying to show someone how smart you are; nobody cares. There's always going to be someone smarter. You must have a nugget in there so people can relate to you. If I'm doing this seminar, I want families to say, "You know what? He gets it. He understands the problem with getting kids in school. As a parent, he understands how difficult it is to pay for college. I want to work with him because he probably understands the situation that I'm in." You only get to that point because you share your passion through the founder's story and end with the founder's story. Again, talk to your ADC if you need to know what a founder's story is. Go to the next Jason Jenkins training at Simplicity; it'll blow you away.

One of the things you want to do at the workshop is encourage the appointments. I've been to so many workshops this season, and the one tip I'll give you is when you're ending, don't give a board that says how to contact you to make more appointments. The best way to do it is when you leave, say, "Talk to my assistant over there, book an appointment right away. I understand we have 30 people here. I can only effectively work with 10 to 15 people before our value proposition gets weighted down, and we don't do that in my college planning firm. We can only safely work with maybe 10 to 15 families right now. I know there's about 30 to 40, so FYI, first come, first serve, but we will do our best to get your kids into college and make it affordable."

Don't allow them to think about it. Let me text the message. Let me let me schedule another time. Life happens. I'm a parent. Most parents out there know what happens with kids. Kids get sick, or there are issues at school. That's life. Don't let life get in the way of making that appointment. Get the appointments booked right now, and if you give them a card on

how to schedule later, give it to them as they're leaving, not in line to schedule the appointment.

Lastly, when you make all the appointments at the workshop, what do you do next? How do you get in front of the families? Have an outline. Just don't wing it. You just spent all this time and money. You need to have a plan. Work with your ADC and how to have a repeatable system so that when people say yes, you can show up.

Thank you so much for attending. It was an honor to give you a new style of Money Script Monday and work with your ADC to attend the next Jason Jenkins Advanced Sales Training. Let's end the year strong, but more importantly, let's use these tips to improve all our seminars and workshops. Thanks again, and happy selling.