

Nailing Your Presentation Opening: 10 Points to Hit in the First 10 Minutes

The Dynamic Patterned Introduction



PRESENTER

Sean M. Bailey, Editor in Chief

Problem

Many presenters rush their openings and bore the audiences from the start:

- **Missing the chance to start strongly**
- **Failing to lay the ground work for their call to action**
- **Getting poor results (fewer follow up meetings)**

Poor Opening

High

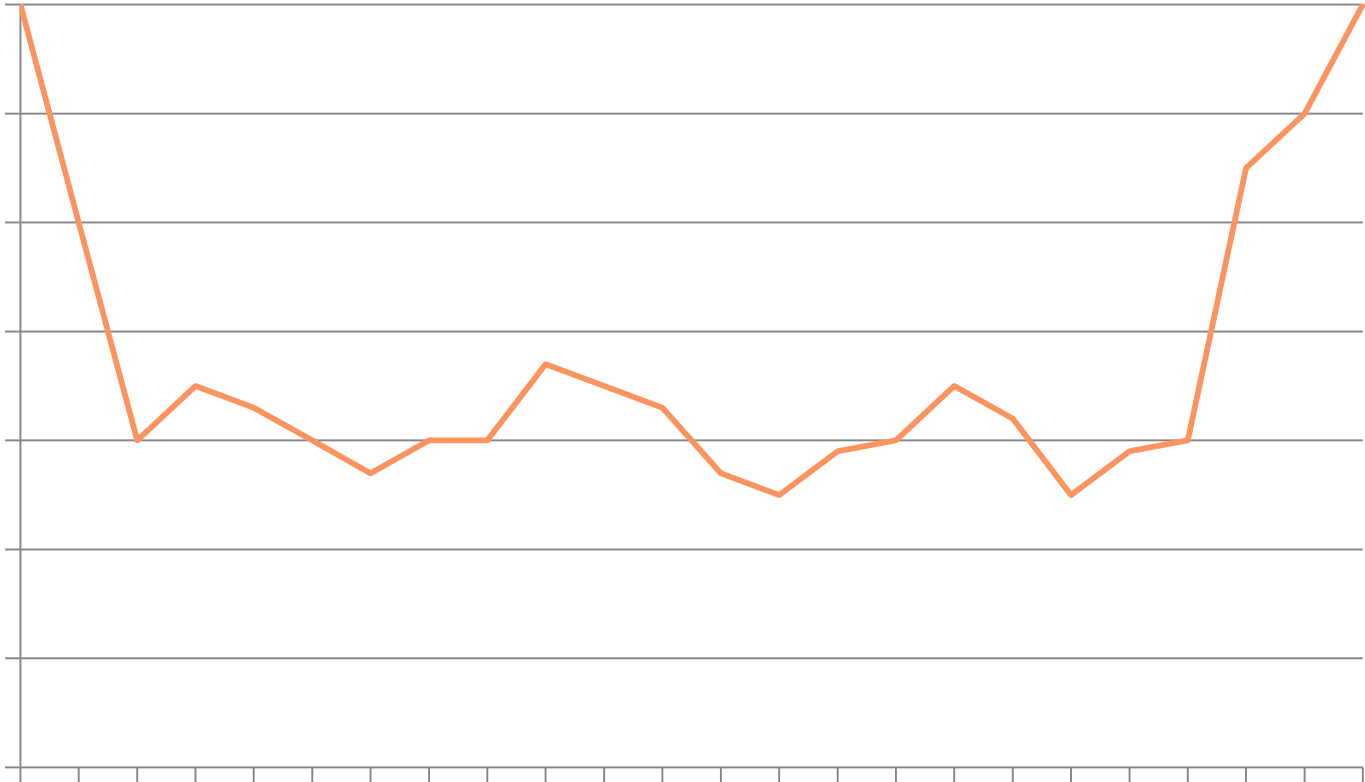
Attention Level

Low

Start

Presentation Length

End



Compelling Opening

High

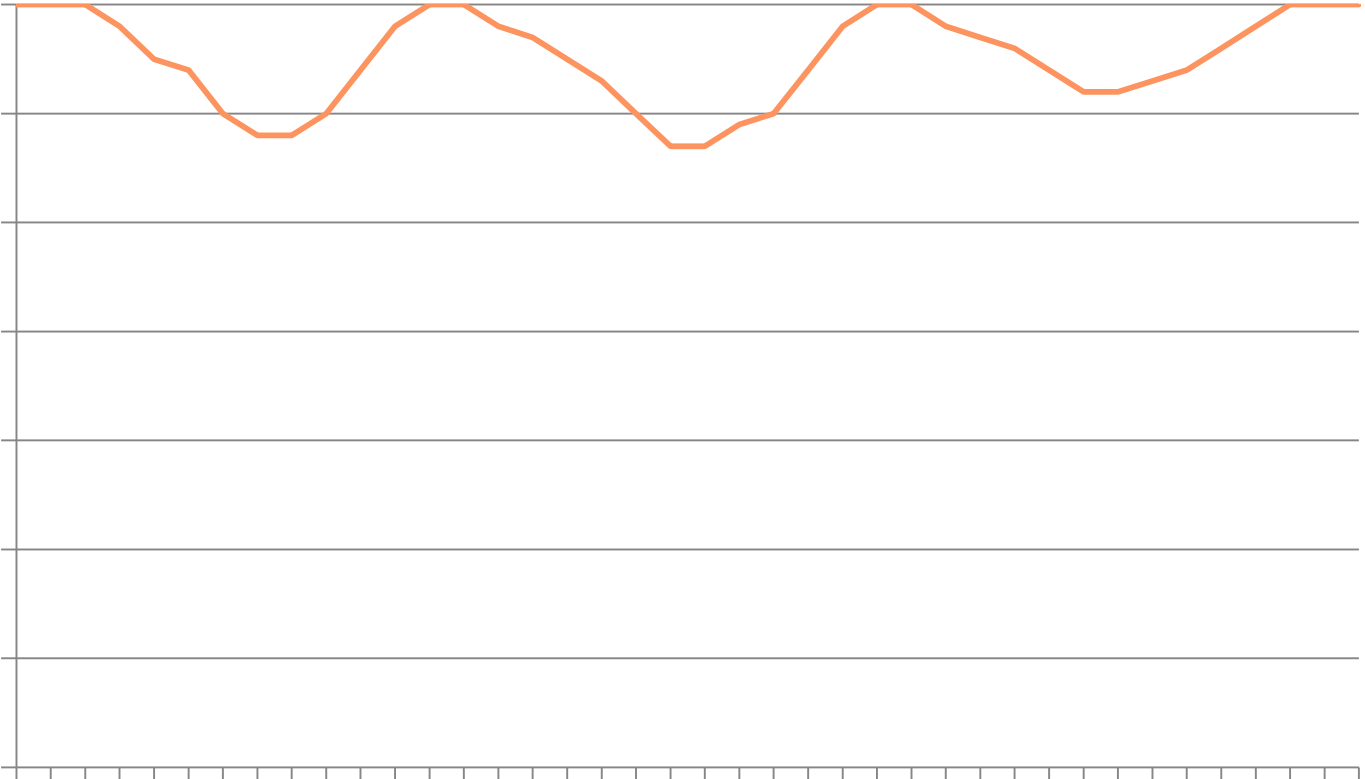
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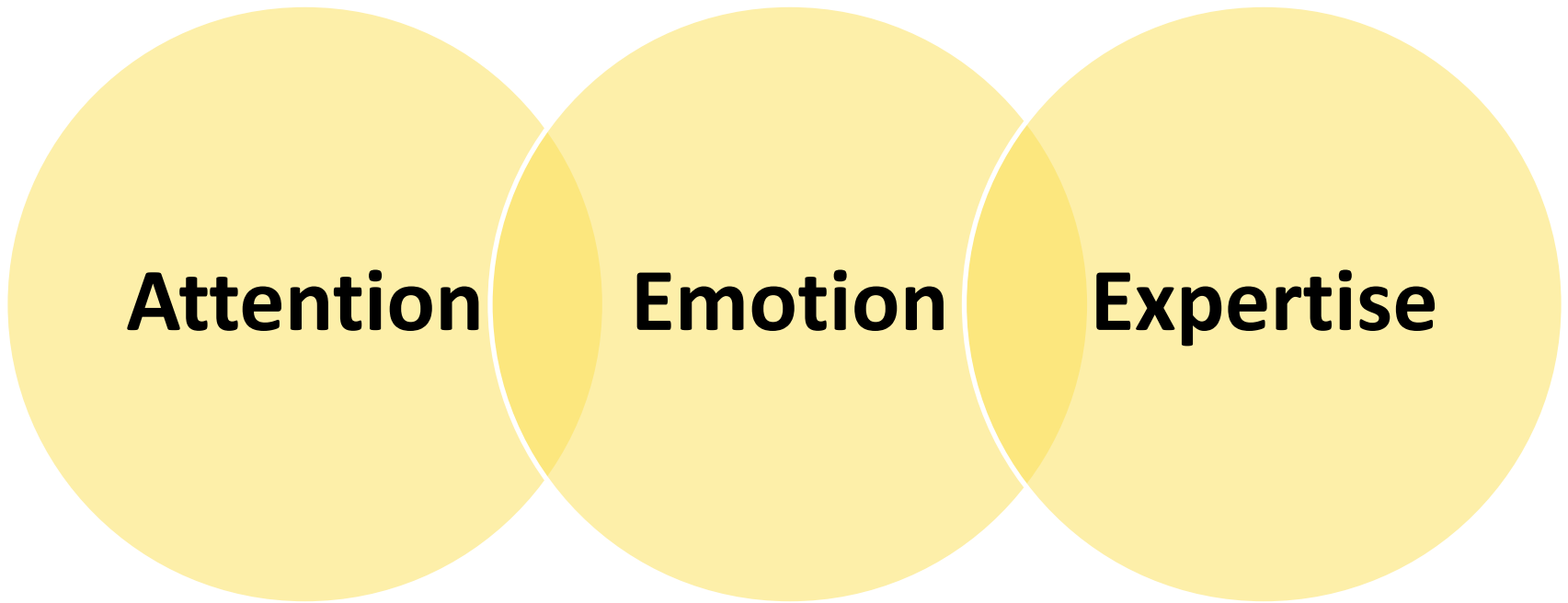
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Solution:

Follow the “Dynamic Patterned Introduction” and carefully touch upon all it’s key points in order to:

- Gain the audiences attention**
- Ease conflicting emotions,**
- Prime them to respond to your call to action**



Nailing Your Opening

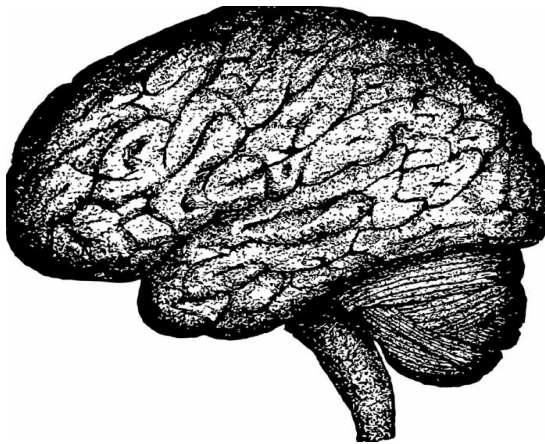


ATTENTION

Key #1
You Must Secure Your
Audience's Attention
and Engage Their Brains

Disengaged audiences won't take action, the opposite of your goal.

Goal: Accept offer of a future meeting



=/=



1. Deliver a “cold open”

- **Grab them by the eyeballs**
- **Prevent the attention slump**
- **Get them on the edge of their seats**
- **Practice the cold open—move slides around if necessary**



11 seconds

2. Thank them for coming out

- **Shortest mention of yourself and your firm**
- **They already know you (Googled you/packet) and don't YET care that much**



EMOTION

Key #2

**You Must Start Managing Your
Audience's Emotions**

3. Explain why you teach

- **People's costly mistakes**
- **Mistakes make your job harder**
- **Trying to help people be smarter**



Jeff's Tip: Make Your Opening Powerful

- First 5-10 minutes critical
- Answer: Who are you and what do you do?
- Answer: Why is a Financial Advisor doing a presentation on ...[Social Security, Medicare, IRAs, College, Caregiving, etc.] strategies?



Jeff's Answers to His Questions



1. Big need for Social Security education—give examples
2. Most people make unwise SS decisions
3. Poor SS decisions make advisor's job harder

4. Differentiate yourself from the competition

- **Critical for retirement presentations**
- **They're transitioning from accumulation to distribution, even if they don't know it**
- **The skill sets for the two phases are different**

Joe Latour's Differentiation

"Listen, you've got two kinds of advisors out there, and they're both good. I'm not here tonight to run down any advisors. You have the accumulation advisor that you would use during your working years (to build your nest egg). But folks, you're in here tonight and you're transitioning out of the accumulation stage into what I call the distribution and preservation stage."

-Joe Latour

5. Make two guarantees

- 1. They'll learn important information that will help them avoid the problem**
- 2. Assure them there will be NO SALES**
 - Mention hoping to “earn the opportunity” to do business in the future**



EXPERTISE

Key #3

**You Must Start Building
Your Expertise**

6. Introduce the one-on-one meeting

- **Explain that everyone's individual case is unique – not cookie cutter solution**
- **Show an example of the output of the first meeting: report, analysis, etc.**
- **Mention it's complimentary but give it value (your normal hourly rate)**

7. Tell them you'll give them some info on the topic to take home

- Goal: “memorable and repeatable” presentation
- Not the slide deck!

The Taxpayer's Quick Reference Guide TO THE **New Tax Law**

CHALLENGE: The new law changes a lot for taxpayers, but not for taxpayers. It's important to understand the new law and how it affects your business, family, and business that's starting in 2018. That's a big deal. Figuring out your strategy is critical to getting the best results for your action.



Key #1

Too many taxpayers are in the pass—especially those that deductions may have been eliminated or changed.

Highlights:

- Miscellaneous itemized deductions are no longer allowed. This includes home office expenses, moving expenses, investment management fees, professional fees, tax prep fees, and more.
- The standard deduction has nearly doubled to \$12,000 for singles and \$15,000 for married couples. Head-of-household filers are expected to benefit.
- Charitable “bunching” deductions—limiting expenses one year and using the standard deduction the rest—lose full advantage of the standard deduction.
- Newly aware taxpayers take a 7% to 10% tax rate reduction for an average estimated savings of \$2,000.
- Starting in 2018, taxpayers will gradually be pushed into higher brackets because of new government aid. Health reform (ACA), making tax credits and the standard deduction just available one time.

Remember: Check your own tax withholding amounts. Many people aren't aware they can request a higher tax rate to get a refund. Reduce your withholding now to get a refund you want.

Key #2

When you live outside a (top) 50% income tax bracket you are not affected by the new rates on deducting state and local taxes (SALT).

Highlights:

- New tax savings this afternoon if you live in a high-tax state.
- Property taxpayers had estimated ability to deduct state, local, property, and other taxes. Now that deduction has been reduced to \$10,000.
- Reducing the SALT deduction will be the most serious in high-tax states including CA, NY, HI, WA, MA, VT, and NY. Benefits for some governments is reduced.
- Interest deduction on mortgages is now capped at \$750,000, down from \$1 million.

Remember: Check your own tax withholding amounts. Many people aren't aware they can request a higher tax rate to get a refund. Reduce your withholding now to get a refund you want.

The Savvy Parents' Guide to Cutting College Costs

By Lynn O'Shaughnessy

How did it get so late so soon? It's night before a afternoon. December is here before it's done. My goodness how the time has flown. How did it get so late so soon? —Dr. Seuss

The Cost of College Today

The cost of college is not cheap. You already know that. You may not know, however, just what a bachelor's degree costs today. Here are the latest figures.

State Colleges and Universities	Private Colleges and Universities
• Tuition/Fees: \$10,400	• Tuition/Fees: \$12,400
• Room/Board: \$10,200	• Room/Board: \$13,500
• Total: \$20,600	• Total: \$25,900

Most Students Don't Pay the Sticker Price

While college costs continue to rise rapidly, there is some good news here. In reality, most families do not pay full price for a bachelor's degree. Fifty-eight percent of students receive scholarships and/or grants at some institutions. At private institutions, it's even higher: 65% of students pay the sticker price. In this guide, you'll learn a variety of ways to the cost of college, including where to find the biggest sources of college money and how to answer the all important question: Will my child qualify for financial aid?

Saving as Much as You Can

You can boost your chances of winning your college bill by saving as much as possible. Carry a 529 plan, you want a 529 plan that has low fees and a long track record. And every borrowed dollar will cost about five dollars by the time you repay the debt. Of course, saving for retirement is also highly important and that should be the first priority for most parents. Keep in mind that parents who save for both college and retirement will have more money available for retirement than parents who save for retirement and take out loans to pay for college. The money made 529 accounts is available from loans and the withdrawal is on the line if they are used for eligible college expenses.

College Grants and Scholarships

Private and public colleges and universities provide students with need-based financial aid, as well as merit scholarships. For many affluent families, money from the college themselves will represent the largest source of money. Over the years, both private and state schools have been increasingly using merit scholarships to attract students. Since the majority of students in this country do not pay full price, it's clearly not just the “M” students who are winning this money. The discounts can be sizable. At private institutions, the average tuition discount is 16%. This figure, which varies from the least



The Baby Boomer's Guide to Medicare

By Steve Page, Esq.

Health Insurance After Age 65

Whether you are retired or still working, Medicare will likely become part of your life after you turn 65. For the most part, Medicare is a good thing. It provides you with secondary to Medicare. As if you are currently covered by a private health plan, an individual policy, or a small employer group plan, you must enroll in Medicare when you turn 65.

If you don't, your insurance status may be jeopardized. And if you do not enroll in Medicare on time, you will be subject to late enrollment penalties. This will apply to the first month you enroll in Medicare at 65 or any year and a portion of the next 12 months. If you are currently covered by a private health plan, you must enroll in Medicare when you turn 65. If you are currently covered by a private health plan, you must enroll in Medicare when you turn 65. If you are currently covered by a private health plan, you must enroll in Medicare when you turn 65.

What Medicare Covers

There are several parts to Medicare. Part A covers hospital care. Part B covers medical services. Part C covers Medicare Advantage. Part D covers prescription drugs. Medicare also covers long-term care. Medicare also covers long-term care. Medicare also covers long-term care.



8. Discuss how you handle questions

- **Save them for the end (people leave on time)**
- **Alternatively, answer as you go**
- **Different approach: Get the burning questions out at the start**
- **Point to evaluation form where people can write down questions**

Tim's approach: Questions

“Inevitably, you’re going to have questions. Please hold the questions until I’m done speaking. That way, those of you that have other engagements can get out of here on time and I’ll stick around to answer whatever questions you have.”



Tim's tip: Answering tough questions

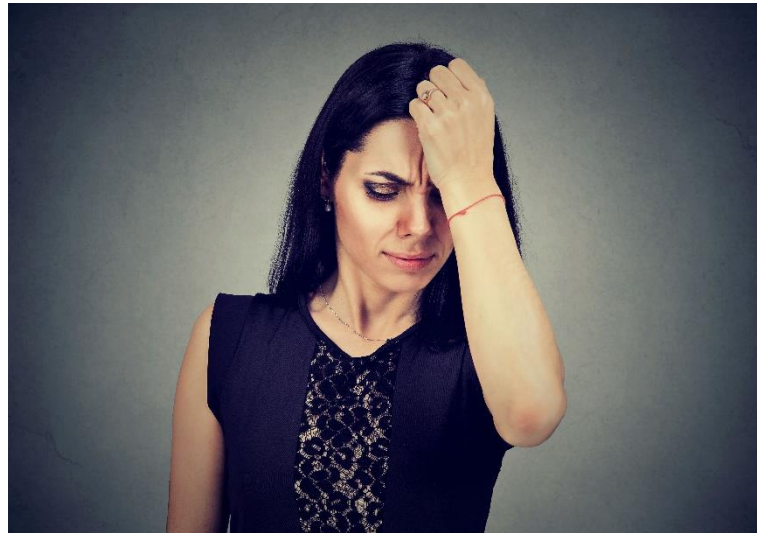
- Acknowledges he might not know everything

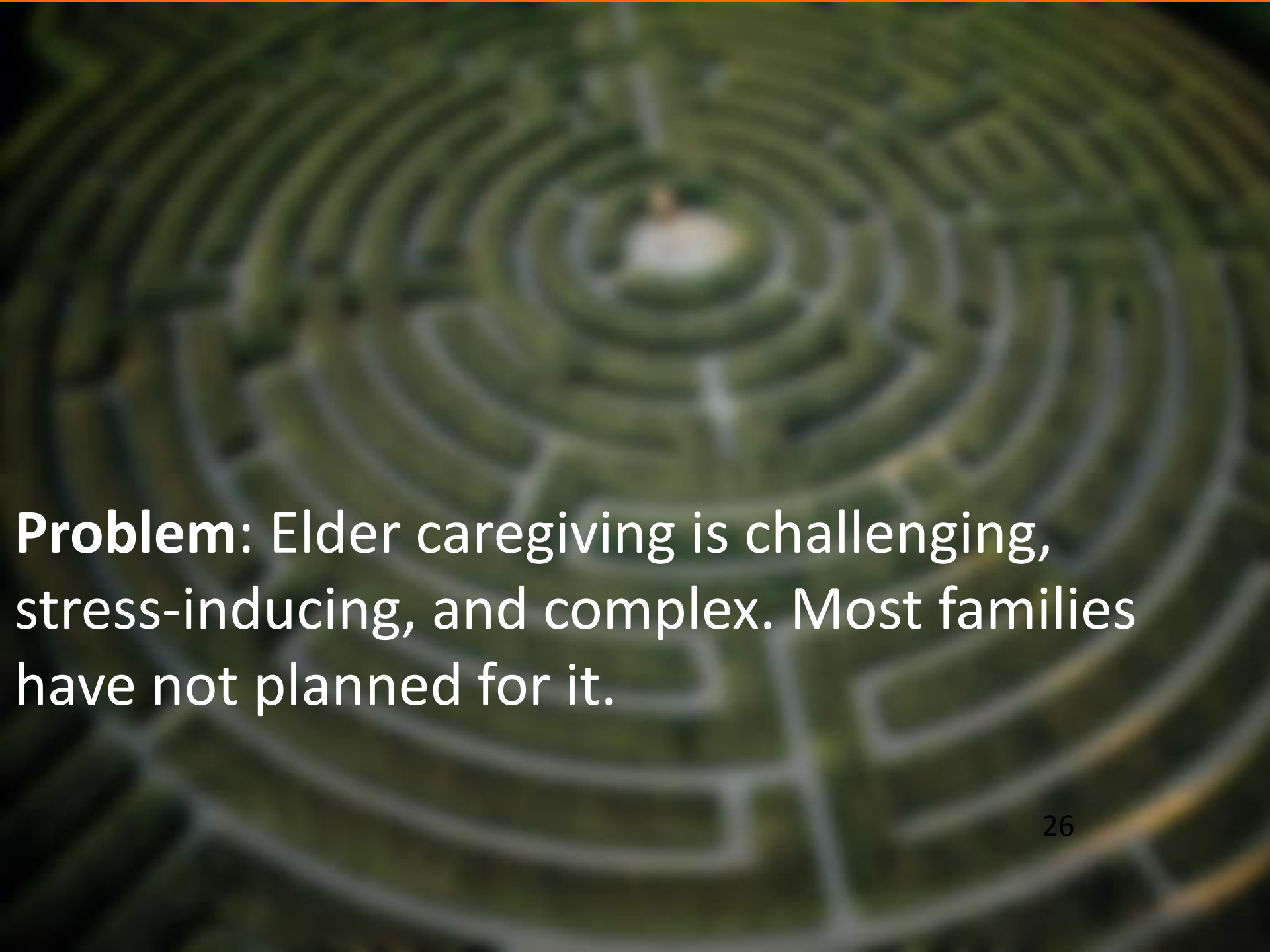
“ ‘Instead of giving you an answer that I’m not sure on, I’d like to consult my brain trust and find out for sure. Would that be okay?’ and they always say ‘Oh, absolutely.’ ”



9. Return to the problem again and linger for a moment

- **Explicitly state the problem**
- **Examine from various perspectives**
- **Tell a brief story about problem**





Problem: Elder caregiving is challenging, stress-inducing, and complex. Most families have not planned for it.

10. Transition to your first big idea

- **Good transitions voice the question(s) in people's minds**



Demonstration: Watch and Listen for the 10 Points



Dynamic Patterned Introduction

SECURING ATTENTION

- ✓ Cold open
- ✓ Proper thanks

PROMOTING TRUST

- ✓ Why teach?
- ✓ Differentiate yourself
- ✓ Your guarantee

BUILDING EXPERTISE

- ✓ One-on-one meeting
- ✓ Information to take home
- ✓ Handling questions
- ✓ Linger over problem
- ✓ Transition to first key idea





11 seconds

Personal Health and Safety Mishaps

- Wandering away from home
- Unexplained car scrapes
- Full-blown car accidents
- Faltering nutrition
- Dangerous home disrepair
- Stoves or freezers left open
- Missed or wrong medications
- Neglected personal hygiene



Chronic Conditions and Emerging Illnesses

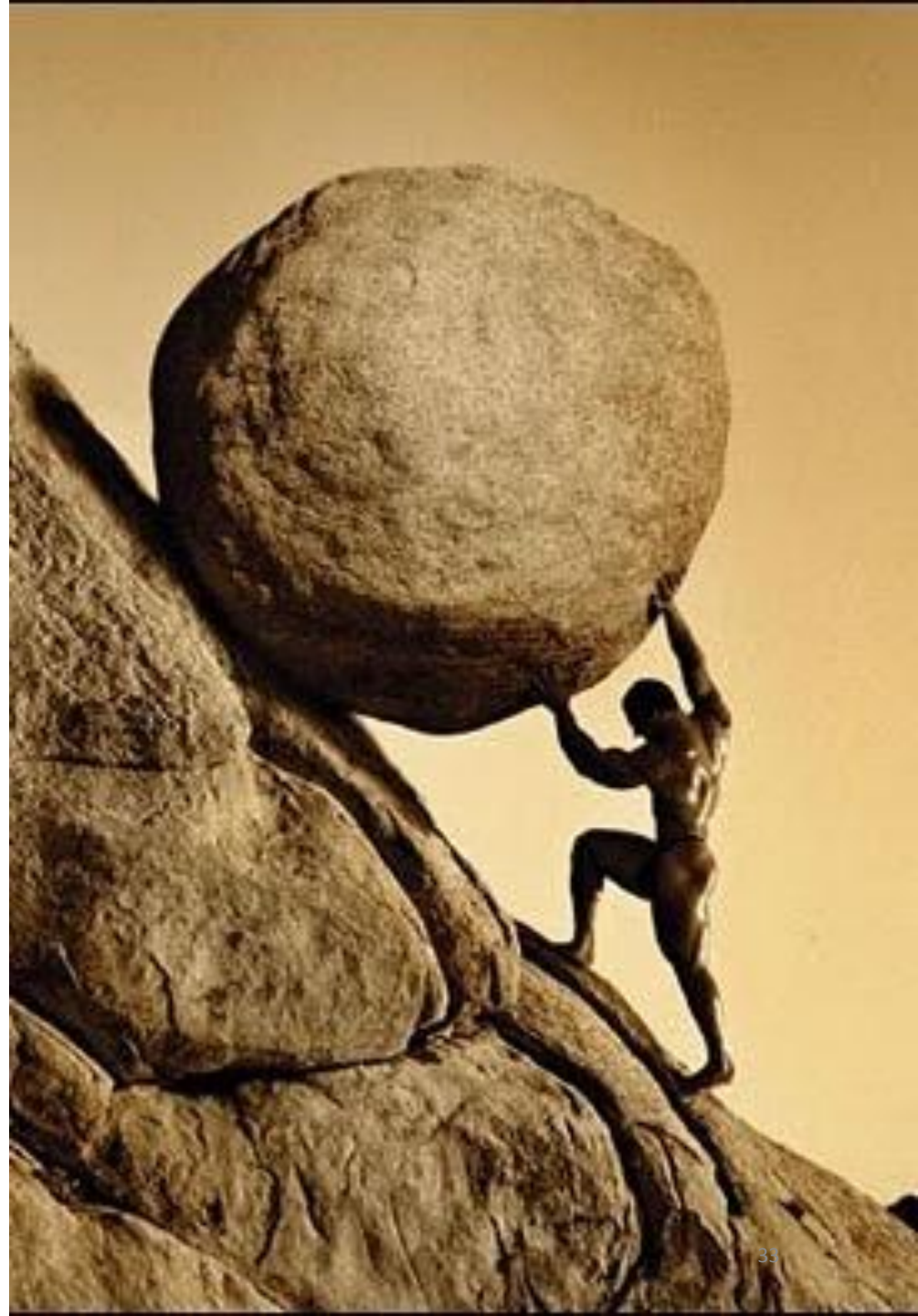
- Diabetes
- Arthritis
- Dementia
- Cataracts
- Depression
- Heart disease



Elder Care Challenges Will Reveal Stark Realities and Unanswered Questions

Examples:

- Who's monitoring love ones' health?
- How will future decisions be made?
- What happens when staying in the home is not an option?

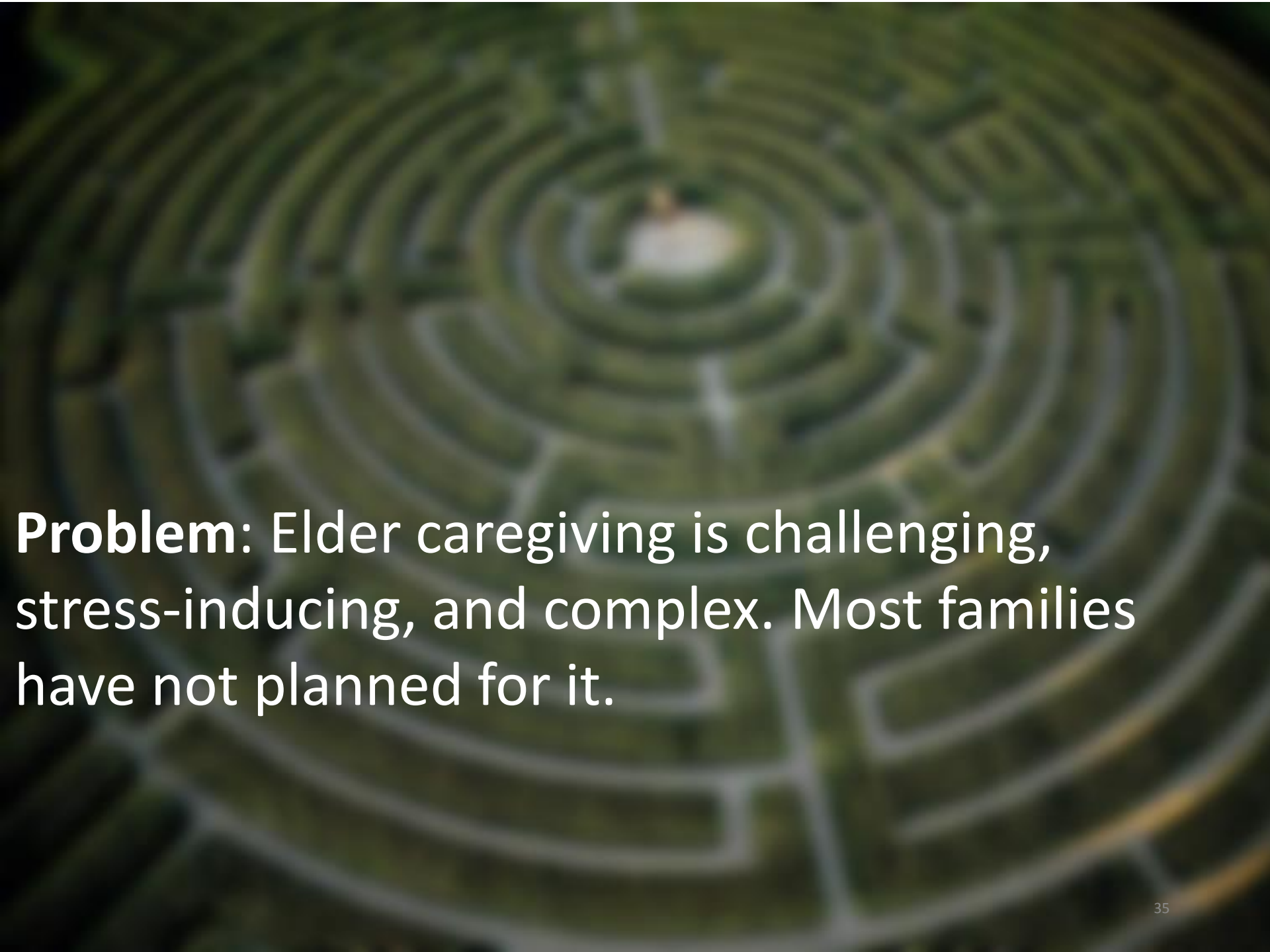


Four Keys to Making a Difference in a Family Caregiving Challenge

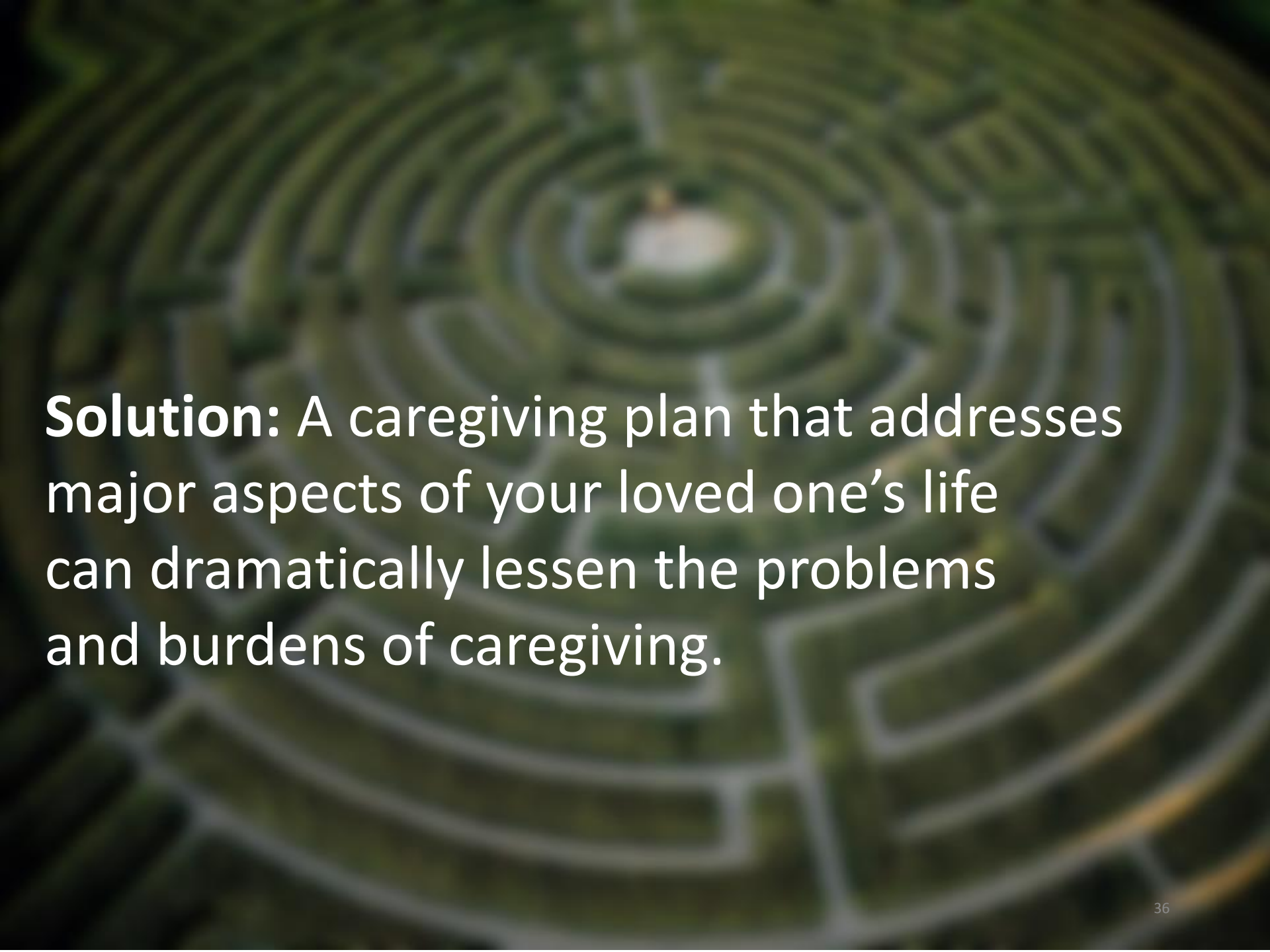
Presenter: Sean Bailey
Horseshoath Financial. LLC

Disclosures





Problem: Elder caregiving is challenging, stress-inducing, and complex. Most families have not planned for it.

An aerial photograph of a large, intricate green maze. The maze is composed of many winding paths and dead ends, creating a complex pattern of green lines. In the center of the maze, a small figure of a person is visible, providing a sense of scale. The overall scene is set against a dark, blurred background, making the green maze stand out prominently.

Solution: A caregiving plan that addresses major aspects of your loved one's life can dramatically lessen the problems and burdens of caregiving.



“What's the most important consideration as we start thinking about how to solve this problem?”

Key #1

Ensure Your Loved One's Good,
Continued Care With Smart Planning

Dynamic Patterned Introduction

SECURING ATTENTION

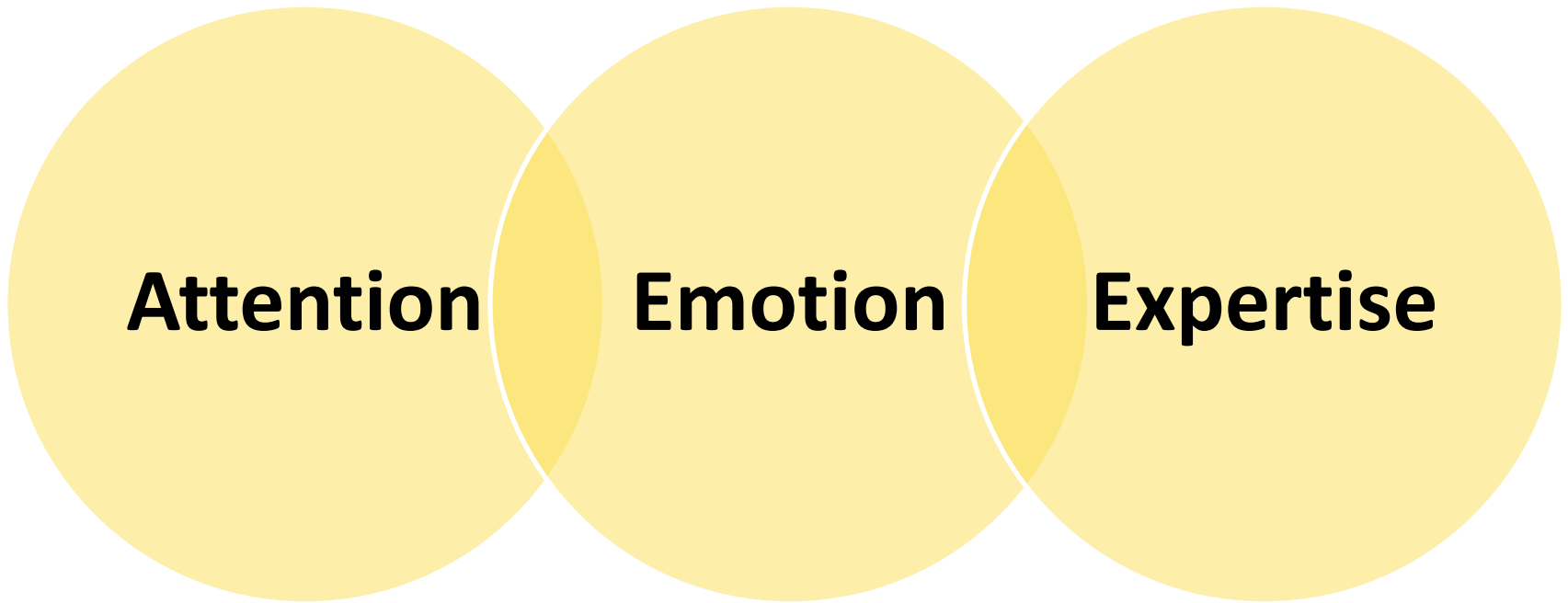
- ✓ Cold open
- ✓ Proper thanks

PROMOTING TRUST

- ✓ Why teach
- ✓ Differentiate yourself
- ✓ Your guarantee

INTRODUCING EXPERTISE

- ✓ One-on-one meeting
- ✓ Information to take home
- ✓ Handling questions
- ✓ Linger over problem
- ✓ Transition to first key idea



Nailing Your Opening

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- **Topic**
- **Venue**
- **Direct Marketing**
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- **Integrated Marketing**
- **Event Preparation**
- **Delivering**

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DAY TWO

- **Delivering:**
 - **Opening**
 - **Middle**
 - **Close**
- **Appointment Setting**
- **Follow-Up**
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Questions?