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PRESENTS



STEPHEN OLIVER, MBA, Ph.D. GREG MOODY, Ph.D

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STEPHEN OLIVER ([00:01](#)):

So we wanted talk a little bit today about online events and let's think about how we want to look at this, Greg. You have the classic webinar and I'll derisively call it death by PowerPoint, right? Do you know what I mean?

Greg ([00:20](#)):

Yeah. Right.

STEPHEN OLIVER ([00:23](#)):

But then you have a more engaging live, hopefully, interactive version of that. Let's say Zoom since I'm a big advocate for Zoom. Right?

Greg ([00:34](#)):

We were one of the first users of Zoom, I think, when they first came out so we were doing it along.

STEPHEN OLIVER ([00:37](#)):

Yeah. We were like number 12 or something.

Greg ([00:39](#)):

Yeah. We want to compare this too, as you say this, to like live events.

STEPHEN OLIVER ([00:44](#)):

Yeah.

Greg ([00:44](#)):

We've done another segment on live events and we get a lot of people that say... That use those as a mainstay of their marketing. These work and can work just as well or even better, and they have a lot of advantages over live events. Number one, you can stay in your office or at your home. Number two, you can market to and have clients from anywhere in the country or anywhere maybe in the world, depending on where your licensed. So this is one reason this can really explode your business and maybe you don't want to travel all over the country, or state, or maybe your clients don't want to drive into a seminar. So this can make a big difference in your [crosstalk 00:01:27]

STEPHEN OLIVER ([01:26](#)):

Well, hell, in some markets, LA or New York. Right? It's...

Greg ([01:31](#)):

Yeah. The traffic is bad enough. Right?

STEPHEN OLIVER ([01:33](#)):

Yeah. I mean, they live in Long Island and you're in Jersey. They live in those places. Right?

Greg ([01:40](#)):

Yeah, or LA anywhere.

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STEPHEN OLIVER ([01:42](#)):

Oh yeah. But there's webinar live interactive. There's pretend live webinar. What's that app we've been... Oh, Ever...

Greg ([02:00](#)):

EverWebinar.

STEPHEN OLIVER ([02:00](#)):

Yeah. EverWebinar.

Greg ([02:01](#)):

And there's other versions of this but it means that you record it possibly once live or maybe you just record it, and then you can play it and it looks like it's live and it looks like it's got interactions and the chat.

STEPHEN OLIVER ([02:14](#)):

Along with playing the chat box in there.

Greg ([02:16](#)):

Yeah. It looks like... You can kind of put in fake questions and go, "Oh, I have a question from so and so and they want to know this." And it looks like it's live and what'll happen is you can put set appointment here, and we're going to talk about how to do appointments in a second, but you can put your offers and everything on the side. So it's real interesting.

STEPHEN OLIVER ([02:37](#)):

Yeah, and then there's just doing a live cast so we could be on Zoom and have nobody else on there, but then we live cast it out to YouTube, MEO, Facebook, et cetera. Right? So live cast out to your Facebook business page.

Greg ([02:53](#)):

Which this can be live casted too, as well.

STEPHEN OLIVER ([02:56](#)):

Yeah, so the live interactive can be livecast. The webinar can be livecast. Well, a pretend live, I guess, the first time. But online, the dynamic is different in part because...

Greg ([03:12](#)):

Another version is the recorded, which is not our favorite one, I guess.

STEPHEN OLIVER ([03:17](#)):

Yeah. I was doing that as pretend live, but yeah, you can have a...

Greg ([03:20](#)):

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Yeah, so the difference between that and the pretend live, this is one that looks interactive. It'll look like there's a lot of interaction happening at the same time. This one is... And we see some people doing this one where...

STEPHEN OLIVER ([03:35](#)):

Yeah. We're registered here for our training session and it doesn't...

Greg ([03:39](#)):

Yeah. It really looks just like... It's pitched as a webinar, but it really is just somebody recording their PowerPoint presentation, and there's maybe a pitch at the end, but it doesn't have the... It's not like this where it looks like to everybody's... From the client's point, the prospects point of view that it's a live webinar. This one, most people are... I don't want to say fooled because that sounds bad. But fooled into thinking that this thing looks that is live. It's treated in the registration like, "We're going to have a live webinar at 5:00, and at 5:00, you register." And it looks like it's live, even though in reality, there's like 20 of these going on or, really, time it's going on, but it's live well.

STEPHEN OLIVER ([04:25](#)):

By the way, the dead giveaway on that... And you've probably seen some. The dead giveaway is always there's one today at 5:00, or there's one today at 2:00, there's one today at 5:00, and there's one tomorrow.

Greg ([04:35](#)):

Yeah. There's a lot of them available.

STEPHEN OLIVER ([04:37](#)):

Yeah. Or I mean, it's in 30 minutes or it's in 5 hours. Right?

Greg ([04:45](#)):

Right, but it's compelling, and if you're not seeing a lot of these like we do all the time, it'll look to the regular civilian that it's live. But anyway, the point is these are clearly promoted as it's a recording and the...

STEPHEN OLIVER ([05:00](#)):

Sometimes this is like the elaborate explainer videos, the animés.

Greg ([05:04](#)):

Yeah. Listen to my speech on this or that, and this is our least favorite because, number one, it's clear that it's not live and people know that it's not interactive.

STEPHEN OLIVER ([05:19](#)):

Yeah.

Greg ([05:20](#)):

Go ahead.

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STEPHEN OLIVER ([05:20](#)):

Yeah. But all of these things... Well, not all of them, the live interactive can replicate the dinner meetings, lunch meetings almost to a tee and can be nearly as effective on generating appointments and with the exception of actually meeting people face to face although, really, you accomplish that so it's not really a deficit.

Greg ([05:49](#)):

Yeah. Live interactive is their face on the screen, not just a chat box.

STEPHEN OLIVER ([05:54](#)):

Yeah. That's a good way of saying it. In fact, we've done it where anybody who didn't have an appointment yet, we pull them off into a breakout room on Zoom and have somebody make the appointment, then put them back into the main meeting. Right?

Greg ([06:07](#)):

Yeah, and that works great.

STEPHEN OLIVER ([06:08](#)):

Yeah.

Greg ([06:10](#)):

The last time we did that, we had a hundred percent set appointments.

STEPHEN OLIVER ([06:13](#)):

Yeah.

Greg ([06:13](#)):

It's not an exaggeration.

STEPHEN OLIVER ([06:15](#)):

Yeah, so what happens here is on a live interactive Zoom is... I'll say, my only hesitation about saying this, if you get people and there's only a phone number and they haven't engaged by video, oftentimes you end up trying to have a conversation with somebody who's not really there. Right?

Greg ([06:39](#)):

Right.

STEPHEN OLIVER ([06:40](#)):

It's the problem with webinars, generally, is they're at their desk. They... Back-to-back appointments, somebody, no-show, they login and their level of engagement. See, at least if they had to get in the car and drive 15 minutes or 30 minutes to come do it, they're engaged in being there, and with the webinar, it's much more like... Well, at any of these levels, it's much more like an infomercial where you've really got to work to keep them tuned to that channel.

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Greg ([07:07](#)):

Right.

STEPHEN OLIVER ([07:07](#)):

Right? You've really got to work to keep them tuned in. But if I can get... I don't care whether there's five people or a hundred people and get them where they're video is live, where they're there, where I can ask them questions, where I get their name on the screen, then we're having the same kind of race that we're having with a live in-person.

Greg ([07:29](#)):

Yeah, and you can facilitate this in a lot of ways, like the reminders for it, which we talked in our other segment where we talked about how you want to remind people to show up and increase your show rates to your seminars or your webinars. If when you do the reminders, you let them know one of our rules is that we want you there live so make sure you show up on a laptop or a tablet, not your iPhone.

STEPHEN OLIVER ([07:54](#)):

And at your desk.

Greg ([07:56](#)):

At your desk.

STEPHEN OLIVER ([07:57](#)):

Not on a cellular connection.

Greg ([07:57](#)):

Yeah, and we want you there live on video because we're going to have interactive conversations, and you make it fun. You make it fun that this is going to be a really fun event, and if you put some personality, inject some personality... Again, we've got another segment on how to give yourself a personality and all of this.

STEPHEN OLIVER ([08:12](#)):

Yeah.

Greg ([08:12](#)):

So if you do that...

STEPHEN OLIVER ([08:12](#)):

At least pretend you do.

Greg ([08:13](#)):

... Or pretend you do. Right? Yeah. Like I have to. So as you do the reminders, you can let them know. Plus at the beginning of the webinar, we'll always tell everybody, "Hey, everybody. Turn your video on. This is an interactive webinar." And establish rules, and this would just be like a elementary school teachers in the first day of school. We've got rules in the classroom. You've got to sit in your desk. You

got to do this. We have rules in the webinar. One of the rules is keep your audio on mute so that we don't have background noise, but we want you to interact so...

STEPHEN OLIVER ([08:49](#)):

And tell you're...

Greg ([08:50](#)):

Yeah. We absolutely want you to interact. Video on, audio on mute and give them some rules. So that makes it more interactive and they know that you're going to be talking, and then by the way, you do engage them. You do talk to them and ask them some questions. So like, "You're from this place." And we've gathered information on them before. So we're not asking them embarrassing questions, but we do stuff to engage people during the webinar. So the more you can do that, the more it's just like a real live seminar, just like you normally teach. If you're the kind of person that teaches a seminar and you never talk to the people personally, you won't have as good a results anyway.

Greg ([09:30](#)):

If you're teaching a seminar and you tend to talk to people personally, and engage them, and ask them questions, you'd have better results. So it's the same way at a webinar. When we hear people say, "Well, the webinars don't work as much as live seminars." Yeah. If at a seminar, you stood in front and you just lectured and you never engaged anybody, that wouldn't work as well either. So it's the same at a live interaction on that.

STEPHEN OLIVER ([09:54](#)):

We had a client who was doing live webinars. The COVID disaster is...

Greg ([10:00](#)):

He was doing live seminars and then he had COVID disaster, I think. Right?

STEPHEN OLIVER ([10:03](#)):

Right. But then he did... He went straight from live seminar, engaging... Really nice guy. To pretend live webinar, recorded something, and had them laying on a page, and played it and...

Greg ([10:16](#)):

Well, yeah, it was this one, I think.

STEPHEN OLIVER ([10:17](#)):

Yeah,

Greg ([10:17](#)):

It was this. Yeah. It was a recorded webinar.

STEPHEN OLIVER ([10:21](#)):

Presentation.

Greg ([10:22](#)):

And I don't think he pitched it as this. He didn't do it the way we talked about where it had the interaction built in, so it looked like a live webinar. So there was no interaction at all. Again, it wasn't like this one that we're telling you that is much better deal and his results plummeted.

STEPHEN OLIVER ([10:42](#)):

Well, let's step back a second because we may have gotten ahead of ourselves. Is all of these online seminars can be for client engagement? In other words, I see people who will meet with their clients personally once or twice a year and that's it. Compare that with every month I have a client meeting that's interactive. They can ask questions, but I'm presenting individual topics.

Greg ([11:15](#)):

On a real interesting topic that should be very relevant to them.

STEPHEN OLIVER ([11:19](#)):

Yeah, or I might have one once a week on different topics. Right? I might have topic A on the first week, and topic B, and topic C designed to create a segment of my clients to show up. Right? That's much more effective and efficient, especially market just crashed and we know that a bunch of people are panicking. Well, why not have a group session, right? I can do 20 or 30 minutes on why investors who write out highs and lows end up better in the long run, and I can give them the date, the stats, and so forth, and I can show them the hundred year graph, and all that stuff. Right?

Greg ([11:58](#)):

Yeah. Instead of what usually happens with [crosstalk 00:12:00].

STEPHEN OLIVER ([12:00](#)):

Dive under the desk. Yeah.

Greg ([12:02](#)):

Bad things happen when they dive under the table and hope that nobody calls.

STEPHEN OLIVER ([12:05](#)):

Yeah, and then I can use all of these for referral events. Right? So that's an event where maybe I'm doing it for clients and I'm encouraging them to invite a friend and creating a mechanism for their friend to register, for them to register event, for them to sponsor them, and to create topics that their friends are going to be just as excited about as our clients aren't going to be. Then I can market just like a dinner meeting through social media, direct mail, hell, I could do TV. I could do radio. I can do a publicity tour. A mutual friend of ours, he does big seminars like fill a ballroom for people who had declared bankruptcy.

Greg ([12:55](#)):

Yeah.

STEPHEN OLIVER ([12:58](#)):

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What he told me was the biggest worry when somebody has to file bankruptcy is can I get a credit card, and can I buy a car, and how do I fix my credit, right? So he had a law firm, and he had a car dealer, and he had a credit card. Something else that I'm forgetting who would pitch him. Right? Same idea as a financial advisor although it's probably not the target audience in most cases, but he went from show up in each city in a ballroom, marketing it through direct mail to marketing it through direct mail and do it on an online form, and his results were identical. So instead of him... He always stayed in the Four Seasons or The Ritz so it wasn't rough duty. In fact, I think he was...

Greg ([13:45](#)):

But he had to fly and travel those places.

STEPHEN OLIVER ([13:47](#)):

Yeah. In his gulf stream but...

Greg ([13:49](#)):

Okay. Yeah.

STEPHEN OLIVER ([13:51](#)):

Yeah, but you get the idea. It's like Le Grant. You know?

Greg ([13:54](#)):

Yeah.

STEPHEN OLIVER ([13:57](#)):

But the reality was is he managed to get the same numbers and the only thing they had to work on a little bit was the car dealership because the car dealerships were showing up with the Mustang and one thing or another, and they sit in the car, so they had to tweak that a little bit to get the same conversion results. But for all of it, they were getting the same results with promoting it by direct mail and putting them in a live video session, and then he shifted it to pretend live because what he would do is he had a little elaborate... Not little, but he had an elaborate home studio by the time he got done with all this stuff. He end up making a lot of money, but he had a home studio and what he would do is he'd record an introduction with the same set, and everything else that everything else was.

STEPHEN OLIVER ([14:44](#)):

So he'd come on and say, "Hey, Denver, I'm so happy to be here." And at some point he's saying, "Thank you for Imic Olles who were here." Or whatever it is and so forth, and then they'd cut into just the same one, and then somewhere at the end, they would cut back in, "Hey, and Denver, this has been really, really great." And be like, "We'll take a little bit of a break, but let me tell you about this." And then he'd come back and say, "Denver's been great" And so really what it was is... And they were all day-seminars, by the way.

Greg ([15:13](#)):

Right.

STEPHEN OLIVER ([15:14](#)):

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So he had three hours, three hours, but he cut in five minutes at the front...

Greg ([15:21](#)):

He injected a little segment for each piece, and the same results.

STEPHEN OLIVER ([15:25](#)):

Yeah. So it was all prerecorded except for that, and then they just marketed to each city. Right? And they had a live event in Denver campaign. They had a live event... But it wasn't like they just broadcasted everywhere. They individually each city and promoted it, and the results were the same except that he didn't have travel expenses. He didn't have to rent a ballroom. He didn't have to get in his private plane, travel, and destitute.

Greg ([15:53](#)):

Yeah.

STEPHEN OLIVER ([15:54](#)):

But you get the idea. So this can be same audience as it would be a luncheon or a dinner meeting. It can be referrals that your clients are bringing. It can be client engagement. What we've talked about in a different segment here is it can also be like circle-of-influence-type of group. So I could do a webinar, a Zoom interactive, a pretend live webinar, a livecast for a CPA's clientele, and in fact, I could do at the pretend live with an introduction that says like... My guy's name's Robin Smith. So, "Hey, I'm so happy to be here with Robin's clients. He's told me ahead of time that you guys are very interested in these topics and I want to make sure we had these topics click." It's already the prerecorded if I wanted.

Greg ([16:48](#)):

Yeah, and understand this that when we talk when we talk to a lot of advisors that we ask them what their marketing is, they say, "Well, I'm trying to get, build a circle of influence with a lawyer, a, a CPA, and have them refer people to me." We've said this before in other segments, but those guys suck at referring people. They're not good at selling their own business. They're not good at selling yours, They're not going to be very good, but this can work great, and all they have to do is either through a couple methods that we can suggest, and we did it in the other segment. They can get people to come to your webinar, which is going to be their webinar about the topic that's going to be compelling for their clients.

Greg ([17:32](#)):

Then again, we're going to cover topics that will be important to them, and then there'll be some, either common offer, or just an offer for them to use your services.

STEPHEN OLIVER ([17:44](#)):

Yeah. I was having a conversation recently and same idea. In the conversation, it was he had a hundred clients, but there were 14 that really needed what we were doing, and I said, "Well, okay, great. Why don't we just schedule a free meeting for them and invite all hundred, but let me know which 14 really, really needed, and we'll just do a live Zoom meeting, and we'll do about 90 minutes on these topics, and it'll be fully interactive. They can ask any questions." And of course, what I would prefer is give me the list and I'll promote it for them.

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Greg ([18:17](#)):

Right.

STEPHEN OLIVER ([18:19](#)):

Right? But if I can't get that, it's going to be I'm going to help him promote it. Right?

Greg ([18:23](#)):

Yeah. Give him all the copy. Give him all the information on how to promote it. Maybe give him a pre-addressed envelopes with everything...

STEPHEN OLIVER ([18:29](#)):

Because by the way, what he'll do otherwise is send them all one email.

Greg ([18:33](#)):

Right.

STEPHEN OLIVER ([18:33](#)):

Yeah.

Greg ([18:34](#)):

You want to make sure they're marketing it the way that we would recommend marketing it.

STEPHEN OLIVER ([18:38](#)):

Yeah, and probably 10-folding from what they will do, but that's the default.

Greg ([18:41](#)):

Yeah. These guys won't do it right so we have to help them do it, but if you can help them market it right and have them, the circle of influence market, to your webinar, then you'll have results from those guys. Otherwise, you really won't.

STEPHEN OLIVER ([18:57](#)):

Yeah, but so in that step back, it can be done for client engagement. It can be done for clients when...

Greg ([19:05](#)):

Which will help you retain your clients and then also potentially have them engage with you more with more business.

STEPHEN OLIVER ([19:12](#)):

Well, yeah. Like you. You'll be top of mind. Even if it's not that they're bringing a friend is they're much more likely to refer people to you.

Greg ([19:23](#)):

Yeah. They'll remember you.

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STEPHEN OLIVER ([19:26](#)):

Yeah. That helps.

Greg ([19:26](#)):

They won't forget your name.

STEPHEN OLIVER ([19:27](#)):

Yeah. Well, and they'll remember you when they're having lunch with friends. They'll remember you when they were on the golf course one day or another, but it can... What was this? Oh, it can be marketing just like a dinner meeting or a lunch meeting, and it can be marketed to the clients of estate planning attorney, CPAs, et cetera, et cetera, et cetera.

Greg ([19:49](#)):

Right.

STEPHEN OLIVER ([19:52](#)):

By the way, this can expand way more than people think. Right? We were talking before about the marketing to the Porsche dealers' customers.

Greg ([20:02](#)):

Yeah.

STEPHEN OLIVER ([20:03](#)):

That's a lot different than thinking it just has to be CPAs or...

Greg ([20:07](#)):

Well, and your ideal client. If your ideal client might be...

STEPHEN OLIVER ([20:11](#)):

Or to the football team or a football team.

Greg ([20:14](#)):

Yeah. The pilots of American Airlines, if that's your niche. We had clients that are working with different groups like dentists. It could be marketed to all the dentists that meet some certain threshold.

STEPHEN OLIVER ([20:27](#)):

Yeah, exactly, but then you can choose a format, and I've got to freely admit, this is my personal favorite.

Greg ([20:34](#)):

Yeah.

STEPHEN OLIVER ([20:36](#)):

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With all of the live events and all the teaching classes we've done over the years, I like being able to say, "Well, then, what do you think? Joe, what do you think? Greg? What, what's your opinion? Joe do you have any questions about this topic?" I like being able to do that. Right?

Greg ([20:49](#)):

Sure.

STEPHEN OLIVER ([20:51](#)):

And I like being able to, in Zoom's format, let me have Bill come over here, and talk to Mindy and then she can schedule an appointment, then I can have the next person.

Greg ([21:01](#)):

Yeah. This one allows you to schedule appointments more directly. This one allows you to have a link for people to schedule appointments and have it automated, which is nice. This one, you can replay, and replay, and replay. This one, may be able to do that. You could have a link somewhere.

STEPHEN OLIVER ([21:20](#)):

It's more difficult because it's going out on different people's platforms.

Greg ([21:24](#)):

Right, and then this one's probably the worst one in that way. So this is kind of an order of most... It's more labor, but it'd probably be the most efficient and then...

STEPHEN OLIVER ([21:34](#)):

Or like a go-to meeting standard death by PowerPoint webinar. Right?

Greg ([21:39](#)):

Yeah.

STEPHEN OLIVER ([21:39](#)):

Which is my... This is probably my least area. This is [crosstalk 00:21:44]

Greg ([21:44](#)):

Well, yeah. How to run the webinars is what we're talking about. If it's PowerPoint slides, bullet, bullet, bullet, bullet, bullet, bullet, bullet, you can have some slides. It's not like you couldn't, but it should be more interactive with you as a person and the slides are color.

STEPHEN OLIVER ([22:03](#)):

By the way, if you wanted an example of how to use slides, go back to any of Steve Jobs' old presentations. Look at how they use Keynote.

Greg ([22:14](#)):

Mm-hmm (affirmative).

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STEPHEN OLIVER ([22:16](#)):

Whether it's the first iPhone reveal, or the first iPad, or any of the other... Is they were a master at, and many are, but master at there wasn't three paragraphs to read on the thing.

Greg ([22:29](#)):

Yeah. There's a few bullet points.

STEPHEN OLIVER ([22:31](#)):

Yeah.

Greg ([22:33](#)):

A compelling graphic, something like that. Just a small thing. The idea is it should just be a...

STEPHEN OLIVER ([22:39](#)):

Or it's a cartoon.

Greg ([22:41](#)):

Yeah, a big picture.

STEPHEN OLIVER ([22:43](#)):

Yeah.

Greg ([22:44](#)):

Yeah. Something, just a reference that is giving them an image. It's supposed to be an image and something that complement what you're talking about, not to replace what you're talking about. It's not supposed to be the story. It's supposed to compliment the story

STEPHEN OLIVER ([23:06](#)):

Now, sympathetic coughing.

Greg ([23:07](#)):

Yeah. What I do... I mean, you can't also use like I use a whiteboard. You can use a whiteboard-type thing, which is good because then you're writing like what we're doing here.

STEPHEN OLIVER ([23:17](#)):

Yeah, or you're using humors. You've got the... Well, I won't use the... I was going to use the Frank Kern example, but that's [crosstalk 00:23:26]

Greg ([23:26](#)):

You got a video to play for them. Is it a video?

STEPHEN OLIVER ([23:29](#)):

No. This was he searched the internet for the world's biggest cock.

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Greg ([23:34](#)):

Oh, that's nice. Yeah.

STEPHEN OLIVER ([23:37](#)):

And the slide he put up was this giant rooster. Well, there you go. But that's Frank.

Greg ([23:47](#)):

Yeah, so you need to know your audience and who you're working with before you do that one.

STEPHEN OLIVER ([23:52](#)):

Oh yeah. Well, my favorite example is the Tony Robbins example. He was invited to a martial arts school convention.

Greg ([24:00](#)):

Yeah.

STEPHEN OLIVER ([24:01](#)):

And he was invited by Chuck Liddell and John Hackleman and his vision was it was the MMA audience, and reality, most in the audience were there with they're with their kids, families.

Greg ([24:13](#)):

Like family kind of people. Yup.

STEPHEN OLIVER ([24:13](#)):

Yeah, families with their kids, and he went in it full foul-mouthed, and gestations, and one thing or another to the point that families were leaving and disgust because it was a mismatch. Yeah, you've got to know what your audience is, so as you go through this, anytime, you can inject humor. Right? Anytime, you can do a little shock value. I see people...

Greg ([24:40](#)):

Those are good things to do, by the way.

STEPHEN OLIVER ([24:42](#)):

Yeah. I see people using like the cat hanging from the ledge and so forth, which is probably overdone but you have the... I use the one with me pulling my hair out, but anytime, you can inject humor or something like that. But the worst thing to do is feel like it's death by PowerPoint and have 12 bullet points that they're reading while you're going through it all. Kennedy will use it when he's making the sale, but he always uses that with... What do they call it? This...

Greg ([25:11](#)):

That old style like a video... Where you just put a piece of paper on the screen.

STEPHEN OLIVER ([25:16](#)):

Yeah, and it shows. But he never... If you notice, he either has the video the paper here and then he has something blocking the rest of it or it'll be he puts it down and you get the idea, This is you trying to make notes on it, then he pulls it away. Right?

Greg ([25:35](#)):

Mm-hmm (affirmative).

STEPHEN OLIVER ([25:35](#)):

And it's like the behind the door secret of what you're going to be. But if you buy whatever it is he's selling, then, of course you get all of this stuff. Right? But it'll always be kind of the, "Oh my God, give me more."

Greg ([25:48](#)):

Yeah. So be careful about when you're doing these kind of things, taking the... If you're working with a company like MassMutual, Northwest mutual, one of the companies, a lot of times they'll have presentation material for you and it is a big, huge PowerPoint full of stuff with a bunch of graphs and things. Mostly, don't use that. I mean, you can take a few of those pieces and sometimes those are helpful and they mean well, but that's not really what we're talking about when you're doing a webinar. It's not what you're [crosstalk 00:26:21]

STEPHEN OLIVER ([26:20](#)):

Or for compliance. It can be you show the slides, but then you turn it on video and you inject [crosstalk 00:26:26].

Greg ([26:28](#)):

Exactly. You don't have to show all the slides.

STEPHEN OLIVER ([26:29](#)):

Yeah.

Greg ([26:30](#)):

Yeah. Don't change them around. We're not saying delete them, but not all of those should be... You wouldn't just go through each slide, no picture of yourself, and then talk, talk, talk, talk, talk. What's even worse, rule number one PowerPoint is never read the PowerPoint.

STEPHEN OLIVER ([26:49](#)):

Yeah.

Greg ([26:49](#)):

So we see a lot of people do these kind of webinars and they're just reading the PowerPoint.

STEPHEN OLIVER ([26:53](#)):

Read off them.

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Greg ([26:53](#)):

Nobody ever needs to hear that ever in the history of mankind so that is...

STEPHEN OLIVER ([26:58](#)):

Whether it's live or online.

Greg ([26:59](#)):

Yeah. No. It doesn't matter where you are. So it needs to be an... When we say interactive, it really does need to be interactive so...

STEPHEN OLIVER ([27:07](#)):

As you know, I fucking hate PowerPoint. Right? I mean...

Greg ([27:11](#)):

Yeah. He doesn't like it. I like it a little bit. I think it should be complementary. So that's that's the recommended version.

STEPHEN OLIVER ([27:17](#)):

Yeah. I mean, if I was using PowerPoint, it would be cartoons, and some humorous slides that somehow make the point of...

Greg ([27:24](#)):

Which would be perfect.

STEPHEN OLIVER ([27:25](#)):

But that would be it. Right?

Greg ([27:26](#)):

Yeah.

STEPHEN OLIVER ([27:28](#)):

Mostly, I'd rather do this or not have it at all. But anyway on that, now you get the idea is in all of this stuff and we talked about in another segment, you've got to make an appointment to follow up or not doing any good. Right?

Greg ([27:44](#)):

Yeah.

STEPHEN OLIVER ([27:45](#)):

Unless it's just purely client engagement, and sometimes even then, you want to...

Greg ([27:49](#)):

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The rules still applies that we said in the live webinar segment is the request for the appointment should happen in the beginning, the middle, and the end, if not all the way through.

STEPHEN OLIVER ([28:01](#)):

Well, but if you in mind, it should happen when and they register before it.

Greg ([28:06](#)):

Oh, right. At the registration point. So you do need to watch our segment on live events. It all applies here.

STEPHEN OLIVER ([28:13](#)):

When we do the breakout room thing, that'll only be the people on our list that don't have an appointment yet so...

Greg ([28:19](#)):

Right. Well, and they can break out and confirm the appointment.

STEPHEN OLIVER ([28:22](#)):

Yeah.

Greg ([28:23](#)):

But again, don't do the big mistake of... Number one worst mistake is you do one of these things, and then at the end, you say, "Oh, if everybody really likes this and think it resonates with you, give us a call."

STEPHEN OLIVER ([28:37](#)):

Yeah. No.

Greg ([28:37](#)):

That's worst mistake.

STEPHEN OLIVER ([28:39](#)):

Yeah.

Greg ([28:39](#)):

Next worst mistake is you do the webinar, and at the end of it, you say, "And if you'd like to do this, click the button and set the appointment." At the end because a lot of people drop off towards the end. That's the number one drop off time especially if they know you're winding up.

STEPHEN OLIVER ([28:53](#)):

Yeah.

Greg ([28:54](#)):

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So it's got to be all throughout the... Especially at these levels, your ask has to be all during it, but this one, it should be... In all of them, as Steve says, it's before when they register. If they are attending though, it should be during all the way through.

STEPHEN OLIVER ([29:11](#)):

Well, and to freely admit, I mean, we had one recently that was really short promotions, not promoted very well, but also meant that there wasn't a lot of lead time to have all this stuff done ahead of time.

Greg ([29:24](#)):

Right.

STEPHEN OLIVER ([29:24](#)):

And so it was like the equivalent of be in a boardroom live meeting.

Greg ([29:27](#)):

Yeah.

STEPHEN OLIVER ([29:29](#)):

If I'm in a boardroom live meeting and I don't have appointments for everybody yet, or if I do, let's say there's 12 people, I'll go through and say, "Now, Lynn, your appointment is Monday. Joe, your appointment is Tuesday. Sue. We don't have a time yet. Would this time or this time be better? Bill, would this time or this time be..." And I'll just go through and make it right there in front of everybody, and when we did that... Remember that Zoom meeting? We just did that as a group.

Greg ([29:55](#)):

Yeah.

STEPHEN OLIVER ([29:56](#)):

And said, "Okay, and I know you have an appointment. You have an appointment. You have an appointment. Bill, I already talked to you, but Sue, Bill, let's just schedule a time and here's... Are you better during the day or the evening?"

Greg ([30:07](#)):

Yeah. So you can just set the appointments right in front of everybody with and you just write them all down.

STEPHEN OLIVER ([30:10](#)):

Yeah.

Greg ([30:11](#)):

I mean, that's doable if you don't have a large group. This is one where we really did this last minute. So we didn't have a really huge group and a bunch of them set appointments in that.

STEPHEN OLIVER ([30:20](#)):

Yeah. Well, and to be fair, about half of them had appointment, but half of them didn't.

Greg ([30:24](#)):

Right.

STEPHEN OLIVER ([30:24](#)):

So then you have the social proof of... And that's why I called out. "You've got an appointment. You've got an appointment. You don't have an appointment. And Sue, you just registered, you don't have an appointment." And it worked well that way.

Greg ([30:33](#)):

So that's a possibility as well.

STEPHEN OLIVER ([30:35](#)):

Yeah.

Greg ([30:36](#)):

But again, the appointment is really critical that it's asked for early, middle, and end. Just don't do those other mistakes.

STEPHEN OLIVER ([30:45](#)):

We haven't talked much about content, but I'll just leave you with one thought is the mission is never really to teach much is. It's to keep the end in mind. Right? So I've heard it described as "Tell them what to do, not how to do it." A lot of of what I see is maybe even what to do, but it is complicated enough and it's confusing enough that they know they need somebody to hold them by the end.

Greg ([31:14](#)):

Sure.

STEPHEN OLIVER ([31:14](#)):

Right? But you want to keep your end in mind, and the end is to get an appointment, phone, Zoom, in person to follow up and close the sale because very rarely in what we're doing are you going to get the sale closed in mass. Right? I mean, unless you're selling a \$49 a month subscription or a box that's going to solve their problem. If you're really doing, you're managing their assets, and you're evaluating their needs, selling life insurance, or an annuity, you're not going to be able to just say, "Here. Click this button, and buy now." Right?

Greg ([31:49](#)):

Right.

STEPHEN OLIVER ([31:50](#)):

So we've really got to drive to an appointment and to close as a client, and you've got to make sure that that's the end in mind and everything is only designed to end up getting a client, but that's designed at an appointment at any time.

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Greg ([32:04](#)):

Yeah.

STEPHEN OLIVER ([32:06](#)):

On that note...

Greg ([32:06](#)):

That's the big message. I don't have anything else to add there. I think that's it.

STEPHEN OLIVER ([32:10](#)):

Yeah. That could be a three-day seminar as well, but...

Greg ([32:14](#)):

Right. Well, that's what we help all our clients do is set the webinars up and get the client, and get the content right.

STEPHEN OLIVER ([32:20](#)):

And the technical pieces.

Greg ([32:21](#)):

Yeah. Including all these technical pieces. So for any of you, don't stress about those, we'll walk you through how to do those on an individual basis because it does kind of depend on what your niche is, which one of these would apply to you, and also what kind of work you're doing, and what your volume is. There's a few other factors to determine which one of these you do. So we'll work that out with you individually.

STEPHEN OLIVER ([32:43](#)):

Yeah. On that note, we'll call it a day here.

Greg ([32:46](#)):

All right. See you next time.