STORY GUIDE:

The Secret

TO INCREASING **TRUST**, **CONNECTION, & LIKABILITY** IN 3 MINUTES OR LESS!

www.crazygoodtalks.com

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Use Your Stories to Grow Your Business

You have great ideas and a big mission.

The way to express those ideas is through your words – spoken AND written. But, if you're like most financial professionals (FPs), you don't know how to strategically weave your words together in a way that makes an impact.

Meanwhile, today's consumer wants to work with an FP they like and trust. Someone they know has their heart in the right place when it comes to managing one of their most important, emotional assets —their money. So how do you quickly relate to potential clients, building a connection that earns you their business? You might be surprised to know the best way to do it is by telling them a story. Not just any story —YOUR story, about why you do what you do. Your purpose.

66%

of consumers are willing to switch from a known brand to an unknown purpose-driven brand*

78%

of consumers would tell others to buy from a purpose-driven company*

Stories solve that problem. They help FPs like you:

- Stand out by sharing your unique passion for serving your clients
- Effortlessly creating deeper connections with your ideal client
- Quickly build business relationships based on trust and empathy

As humans, we're hardwired for connection, and stories have helped us create those connections for centuries. At Crazy Good Talks®, we have helped hundreds of FPs uncover their purpose-driven stories and use them to build relationships and grow their businesses.

Read on to see how we can help you, too.

*2018 Cone/Porter Novelli Purpose Study

What You'll Learn....

I’m pretty sure some guru has told you, "Tell stories!" I'm also pretty sure NO guru has told you the types of stories to tell, where to find them, and how to create them so you make emotional connections that build relationships.

That's where we come in! At Crazy Good Talks, we focus on giving you all the details you need to become a successful business storyteller.

As you can imagine, storytelling is a robust topic and I don't want to overwhelm you. So, the focus of this guide is to teach you how to identify the subject matter for your stories.

Let's Get to Work!

Here's exactly what you'll walk away knowing:

- **The three story types every FP <u>must</u> have in their toolkit**
- **The jobs these stories play in your business or career**
- **Questions to help you identify the subject matter for your stories (this is a place many storytellers get stuck!)**

As a bonus, I've also included real-life story examples!

Every Story has a Job

Before you start creating stories, it's critical to realize that, in business, your stories are assets. They have a job to do. When you strategically choose the right story, find the right angle for your story, and craft it in a masterful way, your Why and Desire Stories literally become part of your business development team.

Here's what I mean. Our client Rodger is a 38-year industry veteran and top-producing advisor. He started sharing his Why Story in his 1:1 meetings with prospects. The result? He said, "Deirdre, since I started sharing my Why Story months ago in meetings, EVERY person who has walked in as a prospect has walked out as a client! Now Rodger already had an 85-90% conversion rate, but at his level being able to increase that by 10-15% is huge! You can do the same. Hear Rodger tell you his results in his own words.

On the page below, I've shared the three story types every FP needs in their toolkit and the job each story does.

Caution: Now that you know the purpose of storytelling isn't just to tell stories (it's to have the story do a specific job for you), be certain you choose the correct story type for the result you're trying to achieve.

If you don't, it'll be like putting your accountant in charge of marketing. It won't work! Similarly, not telling your stories is like hiring a sales rep and then sticking them in a corner to watch you work. Ridiculous, right? Tell your stories but make sure you're telling the right story, at the right time, for the right purpose, to your right prospect/client.

The Three Story Types and Their Jobs

These are the three story types, and each is important for its own reason. Today we will focus on teaching you where to find your Why and Desire Stories. Why? These two are the **most important** in establishing an emotional connection to your ideal clients, and these stories are a way to authentically share your personal brand.

The Why Story

Your Why Story is a story about WHY you do what you do and WHY you care about the business you're in and the people you serve. The job of this story is to build, trust, connection, and likeability in three minutes or less.

The Desire Story™

A Desire Story is a story you tell about a client who got great results working with you. It follows a very specific storytelling structure. Its job is to evoke desire in the hearts of your ideal clients to achieve those same results. This story also allows you to display empathy when warranted, and to sell yourself without sounding too salesy.

The Make-a-Point Story

The job of this story is to make your facts come alive, give your audience context, and make your point memorable. You can use stories that happened to you, that you've seen in the media, that you've read about in history, or that someone else told you about.

PRO-TIP: Be sure not to make it sound like it's a story that happened to you if it didn't and don't try to own someone else's story.

Example of a Why Story

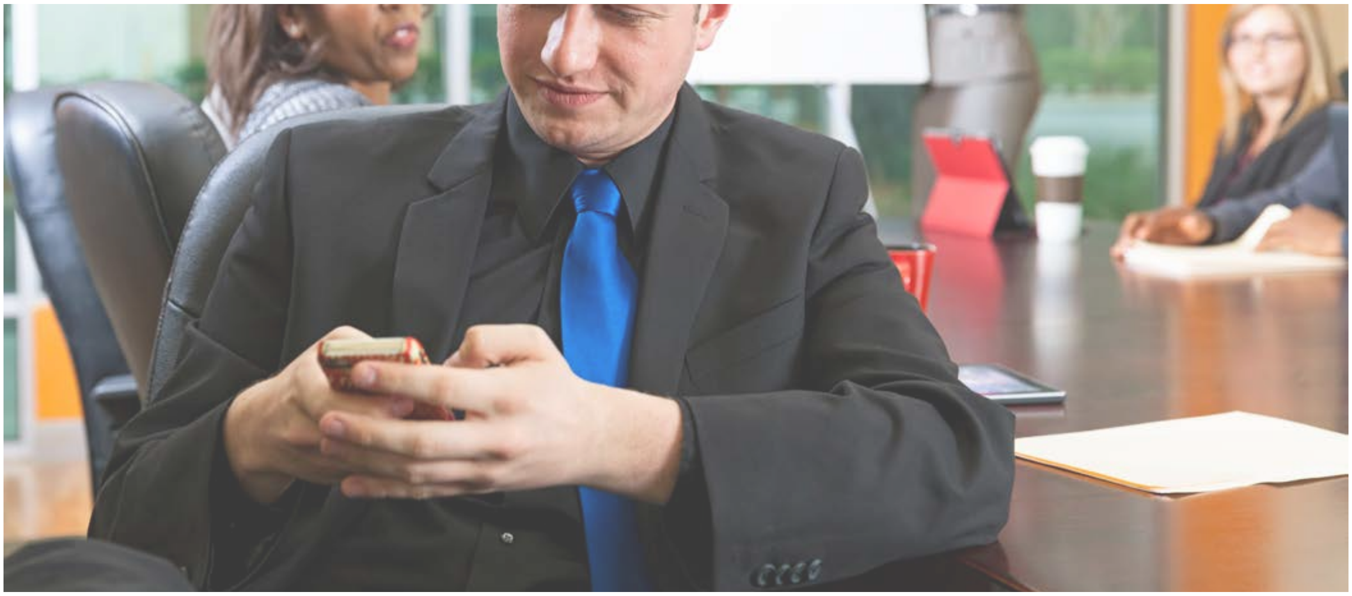
This is what I call an Umbrella Why Story because I can share this story with ANY type of business owner. I also have a Niche-Specific Why Story that I share only with FPs. **To hear that story, please click here.**

Please note, if you serve multiple niches, you may want to develop Why Stories for each niche. That being said, most of our clients start with creating a Why Story for financial planning in general. We take this approach because oftentimes, like my Umbrella Story (told below), this story will apply to most, if not all, of your clients.

"Early on in business, I belonged to a networking group. Each week, members had to give a short presentation.

What broke my heart was that when many of the members spoke, others tuned out.

You could see it in their glazed-over eyes and "secretly" scrolling through their phones under the table...



Example of a Why Story Continued...

This broke my heart because these members were often highly accomplished and really cared about making a difference, **but they were being ignored.** That's not okay with me.

I remember thinking, “They're good at what they do, but they'll **never reach their full potential because they’re not making an impact when they express themselves!"**

They didn’t make an impact because they weren't **compelling and weren't connecting emotionally with people.**

Instead, they loaded people up with facts and figures, rather than telling stories and using other engagement strategies.

This is not surprising because most professionals are taught to communicate technically and academically, when what's needed to capture attention is to **weave your words and ideas together in a way that makes an impact.**

This bothered me so much that I eventually shifted my business from helping professionals master their mindset **to helping them make an impact and expand their influence whenever and wherever they express themselves."**

Questions to Help Uncover the Subject of Your Why Story

One of the biggest mistakes FPs make is not identifying the Why Story that shows their heart/motivations AND shows a DIRECT connection to why they love to help their ideal clients. If you miss this, it will leave your audience thinking, "Why on earth did I just hear that?" This is where FPs run the risk of engaging in TMI (too much information) and boring people.

Let's dig in to uncover your Why Story. The questions below will help you.

1) Who are your ideal clients? Please don't say pre-retirees and retirees. If that's who it is, dig deeper. What do these people have in common other than being in this stage of life? What links them together? What do they care about, think about, value, like to do, etc. For example, I work with FPs. But I don't work with all FPs. The FPs we work with are obsessed with being better tomorrow than they are today. They are mission-driven, never camp out at their current level of success, are coachable, and want to do the best for their clients, families, and communities. Your turn:

Questions to Help Uncover the Subject of Your Why Story, Continued

2) Go through each decade of your life. What happened in that decade that is notable? What made you excited, happy, sad, surprised, etc.? How might you connect that situation or event to why you do the work you do and why you love helping this particular group of people?

If nothing obvious comes up from question 2, then your Why Story is likely in your answers to questions 3, 4 and 5. When we work privately with FPs to help them identify and create their stories, many will say, "I don't really have a 'why,' I just fell into this." To that I say, you may have fallen into it, but it's likely you haven't stayed in it because this is the easiest way to earn a living. Yes, there are awesome reasons to be in this business, but many FPs (at least the ones we work with) stay because of the impact they've had on clients. Your Why Story can be about a client you've helped who made an impact on your life. So, let's look for your "why" in the clients you've helped over the years. If you'd like to see an example of a Why Story, look in the **about section of this LinkedIn profile.**

Questions to Help Uncover the Subject of Your Why Story, Continued

3) What gets you excited to get out of bed each day? What lights you up inside and why?

4) Working with which types of clients or solving what kinds of challenges leaves you feeling really satisfied? Why?

5) Jot down the names of clients you'll never forget — those who touched your heart and changed you in some way. What happened with these clients, how did you help them, what did you miss that you vowed from that moment on you'd do differently, or what lesson did you learn from working with these clients?

Now look through your answers above and choose the subject and angle for your Why Story. Choose the one that you feel the most passionate about AND that makes an obvious connection to your ideal clients as to why you love to help them.

Example of a Desire Story

Unlike your Why Story, where you may have just one or two, ideally over time you'll create multiple Desire Stories. I tell my FP clients to first create a Desire Story about their planning process and then to start creating stories for every service/product they offer and niche they serve. For example, if you serve business people and doctors, you will need a Desire Story for each of those groups, as neither may feel moved by a story about the other group. Below is an example of a Desire Story I share when I am talking with FPs about having us identify and create their Why Story.

Meet Susan, a financial advisor from Ohio. She's got dark hair, is in her mid-40s, and is super friendly.

A few years ago, Susan and I had a conversation where she said, “Deirdre, for the past 12 years, my firm has put on this event where we invite clients, their friends, and members of the community to pack meals for orphans overseas. As you can imagine, it's a great service to the community, and it's a good branding and visibility event for us. We get a lot of pats on the back, but you know what we don't get?

CLIENTS. We never get any clients from the event. It's frustrating. This year, I’m hosting the event, and I want to bring in new clients from it.”

Example of a Desire Story, Continued

Fast forward to a few months later when Susan and I met up at her company's annual conference.

She said, “I'm so excited! Remember that event that I told you about? Well, we had it and you wouldn't believe...before it was over, five different people came up to me and said, ‘Can we meet?’ Three have since turned into clients!”

How did Susan end the 12-year no-client drought that her firm experienced when holding this event?

When she opened the event, instead of ticking through her resume of certifications and accomplishments as previous advisor hosts had done, Susan introduced herself and the event by telling a very specific type of business story: **her Why Story.**

Questions to Help Uncover the Subject of Your Desire Story

Your Desire Stories are typically about clients you've helped get great results. Ideally, these stories are about clients who are similar to your ideal clients.

Bonus Tip: The more similar your characters are to your ideal clients, the more they will see themselves in the story and see you as the solution to their problems.

So, let's get to work and identify your first Desire Story! Start with the product or service you most often sell or the one you want to sell.

Ex: If you're an FP, I recommend you start with a story about your financial planning process.

1) Make a list of clients who are raving fans. Why? What did you do for them to make that happen?

Questions to Help Uncover the Subject of Your Desire Story, Continued

2) Think of a client who was not in a great place when they met you who is now doing Crazy Good. What was their life like then, and what is it like now?

3) Which clients have gotten great results working with you, and had a similar problem to many of the prospects/audiences you talk to?

Look through what you wrote above and decide which story is most relatable and would create the most desire (in your ideal clients) to get similar results. Start there.

Next Steps

Thank you for inviting me into your life to guide you on your storytelling journey. My hope is that you've identified the subjects and angles for one Why Story and one Desire Story.

The next step is for you to dive in and start crafting those stories.

I'll admit, this can be hard. Business storytelling is an art and science. Unless you've taken storytelling training, many FPs fall into the **THREE big business storytelling traps:** rambling, sharing unnecessary details, and not making a clear point/connection with their stories.

So, if you'd like us to help you with your stories, the next page provides a link for you to learn about how we work with FPs, and the last page gives you a QR code to subscribe to our podcast. The Crazy Good Talks Podcast is packed with strategies to help you become a better speaker, writer, and storyteller.

I hope to hear from you soon!

Blessings,

Deirdre Van Nest

Do You Need Help?

Identifying and crafting your business stories can be **hard**.

Sometimes you just need the experts to do it for you.

We get it, and we would love to help!

Our highly skilled story strategists and artists
are ready to help you:

Write your
Why and Desire Stories

Coach you
on how to masterfully tell your stories

Show you
exactly how to put your story to work
so it's an asset for your business

WE CAN HELP!
CLICK HERE

WELCOME TO
CRAZY GOOD TALKS!

ABOUT OUR COMPANY

Crazy Good Talks® was founded by Deirdre Van Nest, a top-rated international speaker, story strategist, and creator of two Crazy Good Talks® proven methods: the **Crazy Good Talks® Blueprint** and the **Emotionally Engaging Advisor.** These are virtual programs that teach you how to develop your thought leadership, connect emotionally, and make an impact!

If you'd like to explore our **done-for-you asset creation services**, check out **The 60 Minute Story™**. You give us a 60-minute interview, and we'll give you a masterfully crafted story for your business written in your voice!

Listen to our **Crazy Good Talks® Podcast** for more ways to maximize your speaking, writing, and storytelling skills, or use the QR code on this page to subscribe!

Deirdre Van Nest