



STEPHANIE  
BOGAN

# TELLING YOUR STORY

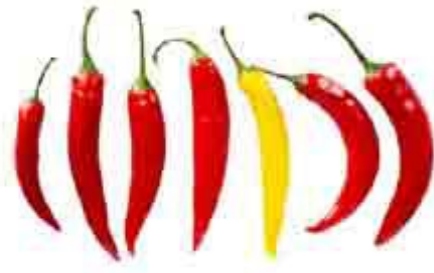
How to Share What You Do  
in a Way that Really Works

# TELL Your Story, Don't SELL Your Story



## WHAT I DO

The Value I Add



## WHO I DO

### IT FOR

I Do My  
Best Work With...



## WHAT IT

### COSTS

How I Charge



Your Value Is  
**ADVICE**



Not  
**INFORMATION**

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# the PRODUCT

Features & Benefits  
Deliverables & Returns

# the ADVICE

Advice  
Experience

# COST

"Price is only  
an issue in  
the absence  
of value."

# VALUE



WHICH IS WHY FINANCIAL ADVISORS NEED TO GET OVER THEIR

**CRISIS**

*of* **CONFIDENCE**



SHOW UP AND TELL

*Your Story*

UNAPOLOGETICALLY



# DANGER: SALESPERSON



# BREAK THROUGH



The  
Background  
Noise



# THE *Sweet* SPOT

PERSUASIVE  
EDUCATOR

Noise-Maker

Salesperson



L I M I T L E S S

FUNCTIONAL

EMOTIONAL



# WHAT I DO

## Shifting Focus

SELLING  
(cost)

SERVING  
(value)

FEATURES & BENEFITS

OUTCOMES & EXPERIENCES

# WHO I DO IT FOR

- ③ *Clarity* of who you do your best work with
- ③ *Enables* specialization and
- ③ *Creates* gravity

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# THE VALUE THEY WILL RECEIVE



Accelerate Your Success



Gain Back Time & Freedom



Build Wildly Successful  
Business And Life That  
You Love

# WITH PROSPECTS

“ I’ve helped a lot of clients with \_\_\_\_\_ ”

“ Be sure to consider \_\_\_\_\_ ”

“ Lots of people make the mistake of \_\_\_\_\_ ”

# 3 QUALITIES

of a "right" client

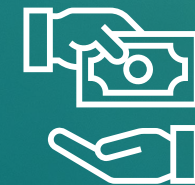
FIT YOUR IDEAL CLIENT PROFILE / NICHE, AND...



MOTIVATED



ABLE TO SEE  
THE VALUE



WILLING  
TO PAY



# MAKING IT POP!

Putting it All  
Together

# In Practice

## BUILDING YOUR STORY MESSAGING EXERCISE

I HELP \_\_\_\_\_

TO \_\_\_\_\_

SO THAT THEY CAN

\_\_\_\_\_

\_\_\_\_\_

AND \_\_\_\_\_

# CRAFT YOUR STORY

in your workbook



Your messaging needs to express the value you offer to your clients, along with how you are positioned to deliver that value. Your messaging should cover:

- Whom you serve, your target audience
- What you offer, including benefits, outcomes, emotional state, etc.
- What specific problems you solve
- Your approach to solving the problem
- The before and after state of the client

more than any other financial professional demonstrate professional expertise. Your messaging needs to be effective in a few sentences, clear, concise and compelling.

### BUILDING YOUR STORY MESSAGING WORKSHEET

Complete this worksheet to help you clarify, define and package your brand messaging points into a clear, concise and compelling prospect story.

#### IDEAL CLIENTS

Who are your ideal clients? List the top 5-10 characteristics of the clients your message intends to attract.

1. _____	6. _____
2. _____	7. _____
3. _____	8. _____
4. _____	9. _____
5. _____	10. _____

#### FROM HERE | BEFORE STATE

_____
_____
_____

#### SOLUTIONS & BENEFITS

_____
_____
_____

#### TO HERE | AFTER STATE

_____
_____
_____

#### WHAT I DO

What I Do & The Value I Add

What is the work you do? And what is the main impact, outcome and/or experience you help to create with your work?

#### THE VALUE OFFER

Describe the 3 key (client-centric) outcomes you help create. Include 2-3 points that support these points in more detail.

#### Key Outcome #1:

Supporting Points  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

#### Key Outcome #2:

Supporting Points  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

#### Key Outcome #3:

Supporting Points  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

#### 3 KEYS

Define the 3 messaging points that best support your role, the approach you take and process you follow for delivering value.

#### Define key points regarding the ROLE you play as their Financial Advisor:

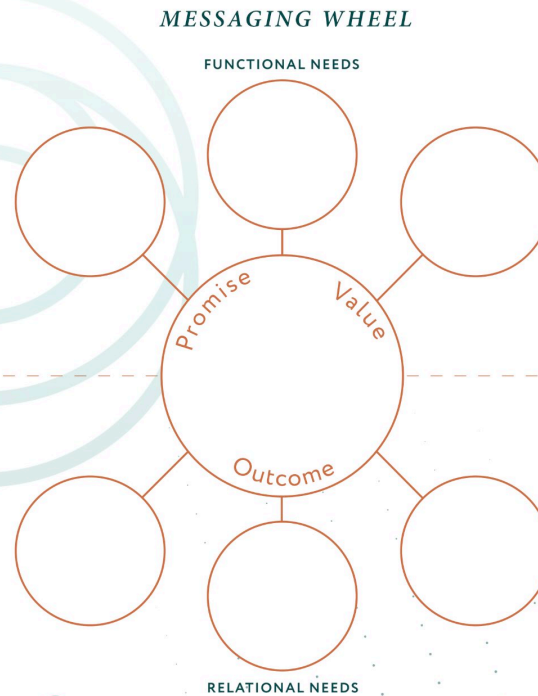
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

#### Define key points regarding the APPROACH you take as their Financial Advisor:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

#### Define key points regarding the PROCESS you play as their Financial Advisor:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_





## WATCH & READ

- How to Define Your Value, Stephanie Bogan
- Scripts, Nick Murray
- Mastering Marketing As A Solo Advisor By Simply Sharing Your Authentic Self, with Eric Roberge, Michael Kitces
- Storyselling for Financial Advisors : How Top Producers Sell, by Mitch Anthony and Scott West
- 6 Key Value Propositions a Good Financial Planner Can Provide, Michael Kitces



## APPLY

- Complete the Building Your Story Messaging Worksheet and Messaging Wheel Worksheet to get clear on and master your brand message.
- Use the Brand Brief Tool and Brand Design Template to determine or refine your brand.



## ACT

- Practice "telling your story" out loud 3x day for 30 days (add to Success Shifter)
- Update your website value proposition, brand messaging and storytelling strategies.



LIMITLESS Q&A