

## Speaking outline for c-suite executive presentation

### Outline

#### I. **Open**

- A. Any parent with a smartphone-toting teen knows that while it's never been easier to connect with clients today — engaging with them has never been more difficult.
- B. You need to engage the client on their terms.
  - a. They are in control.
  - b. They are expecting — no, demanding — digital.
- C. If you're not doing this and you're not doing it well, you are missing opportunities.

#### II. **Everyone is digital**

- A. Every demographic is expecting digital today. Covid has made that a fact.
- B. While it was weighted heavily toward Millennials pre-Covid, the floodgates are open.
- C. I was on a Zoom 80<sup>th</sup> birthday video call for a relative. A dozen attendees were in their 70s and 80s. All had little problem joining in. Their grandchildren, too.

#### III. **What's at stake?**

- A. Make no mistake, if you're NOT doing this, you're an outlier.
- B. You're telling your clients that you are unable or unwilling to meet them on their terms.
  - a. That you don't care

#### IV. **It's not face-to-face. But that has its advantages, too (efficiency)**

- A. Nothing beats developing a relationship face-to-face. That's true. But nothing can help accelerate your growth like digital.
- B. Think about it: You go to a networking breakfast and hand out 10 business cards.
  - a. Each of those contacts picks up 30 other cards.
  - b. You represent 2.5% of their interactions that day. I don't like those odds.
- C. But you post a compelling piece on LinkedIn or Facebook and it touches on something meaningful to people, it's shared a thousand times.
  - a. Your one digital footprint has now expanded 1,000-fold.
  - b. That's efficiency.
- D. And you can have 5, 6 Zoom meetings a day with clients.
  - a. How many could you ever meet face-to-face, taking into consideration driving time and meals? One? Two?

#### V. **Close**

- A. I get it. My teenager is a zillion times better at this stuff than I'll ever be. But ...
- B. Make the effort.
  - a. Establish a presence.
  - b. Get on Facebook, Twitter, LinkedIn.
- C. Your clients are scared and they are looking to you for reassurance. If you aren't where they expect you to be, they're missing you.
  - a. And you're missing out.

- D. Now more than ever, you need to reassure them that you are there for them ON THEIR TERMS
- E. Let them know what you're doing to maintain a clean and safe office space, in the event that in-person meetings resume.
- F. If you're simply reacting to the marketplace, you're 5 steps behind.
  - a. This is about being proactive.
- G. This is about remaining relevant.
- H. This is about ensuring that your clients' experiences are everything they expect them to be.

### Questions

1. There's a new norm now. Covid has certainly changed things. But weren't we headed in this direction already? The need to engage differently? I mean, when there's a vaccine and Covid is controlled, a good part of this new norm will be sustained, isn't that right?
2. This is more familiar among our younger demographic of advisors. For those who aren't even social media users — zero digital footprint, and that's a fair number of you — what's a realistic execution? And more important, how do they get started?
3. Talk about urgency and timeline. What needs to be done short-term, long-term.
4. Finally, when is the payoff? Set expectations so advisors understand how and when their efforts will pay off, and how they will be able to measure it.