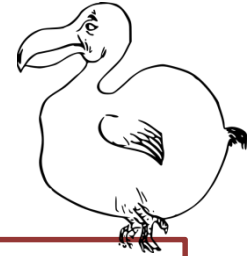


Don't Let Your Practice Go The Way Of The Dodo Bird



Robo-Advisors and Artificial Intelligence – Friend or Foe?

Where is the industry going and how do you
position your practice to cope with these
fast-moving changes?

Buck Rogers



Lost in Space



Star Trek

R2D2

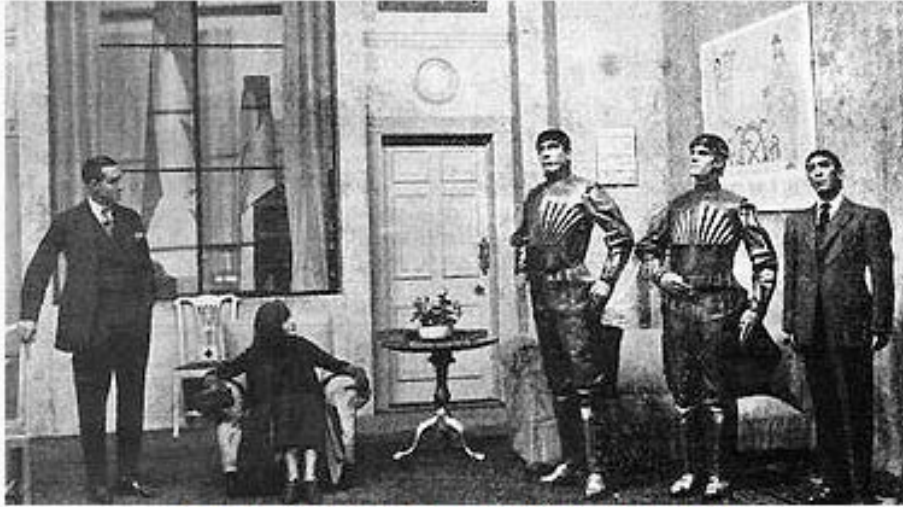


“robot”

First coined by Karel
Capek in 1921.

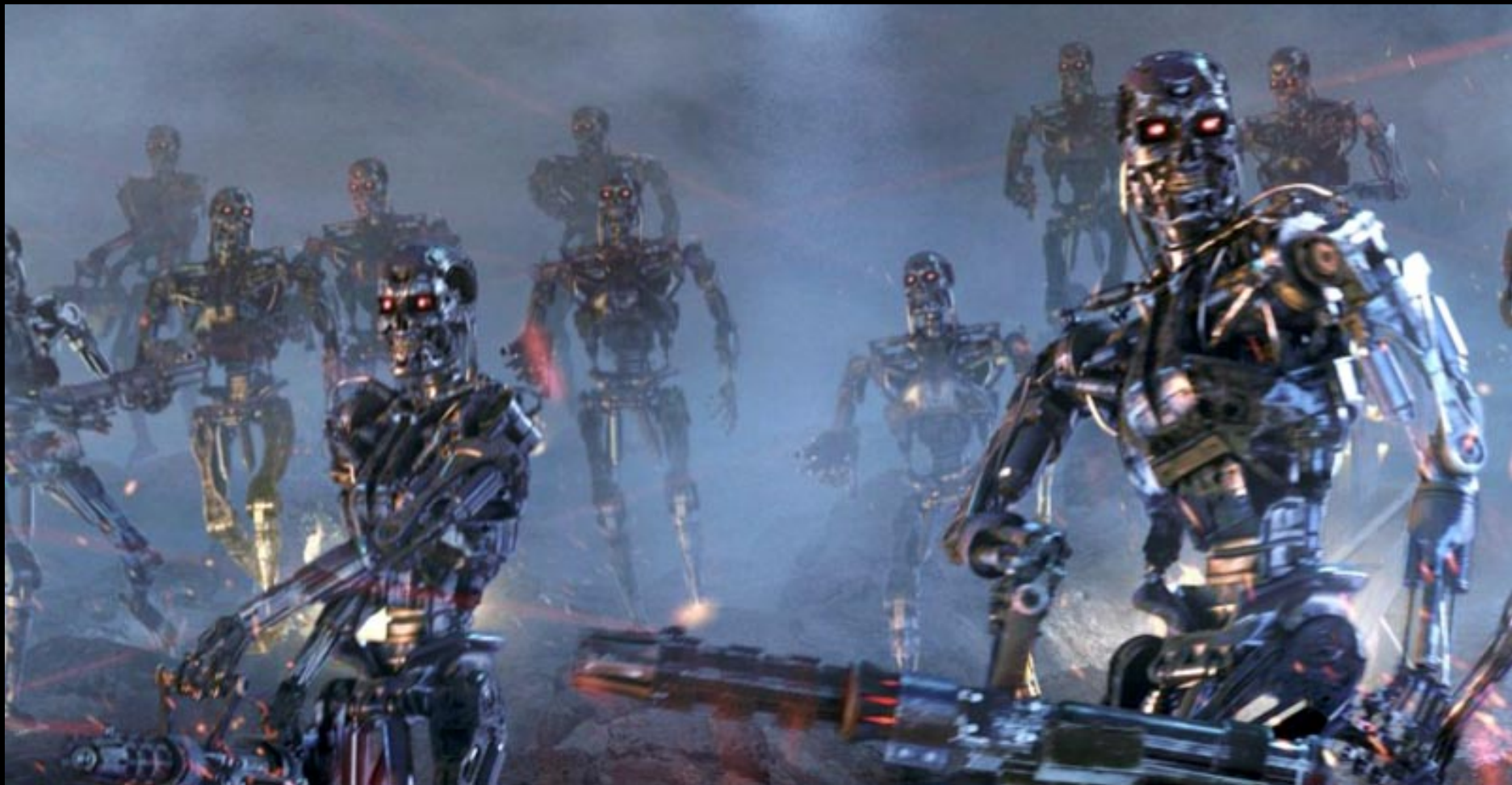
Czech word meaning:
forced labor

R.U.R.



A scene from the play, showing three robots

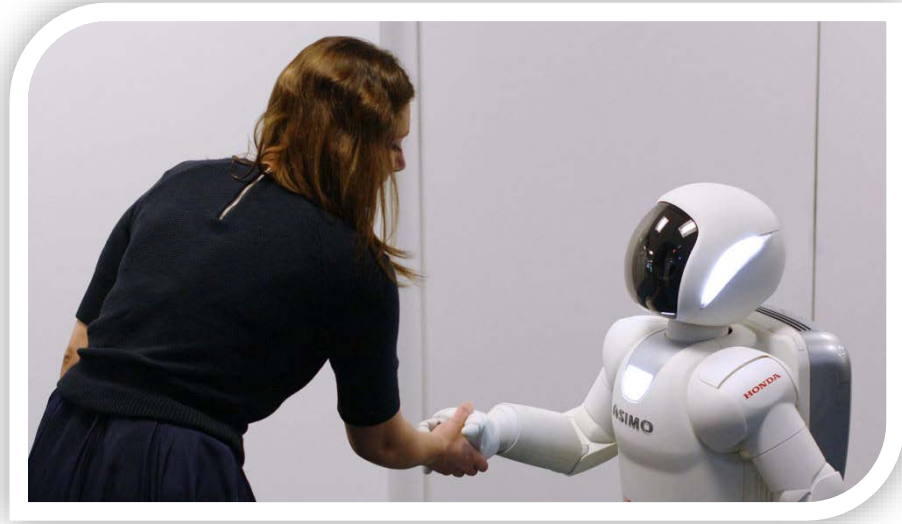
Written by	Karel Čapek
Date premiered	25 January 1921
Original language	Czech
Genre	Science fiction



ASIMO by Honda



- More relatable
- Less threatening
- More human



- Very, very smart
- Getting smarter by the day



WSJ. MAGAZINE
Charlize Theron:
Hollywood's Humble
Heroine

STYLE & FASHION
Break the Fashion
Rules in Clashing
Patterns

DESIGN & DECORATING
Swing Into Spring
With a Hanging Chair

WSJ.
Desi
Chlo
Waig



3854



LIFE | IDEAS | THE SATURDAY ESSAY

Machines That Will Think and Feel

Artificial intelligence is still in its infancy—and that should scare us



How Smart?

“Once we have figured out how to build artificial minds with the average human IQ of 100, before long we will build machines with IQs of 500 and 5,000.”

“But we don’t have the vaguest idea what an IQ of 5,000 would mean.”

How Smart?

“Artificial intelligence is breathing down our necks: Software built by Google startled the field last week by easily defeating the world’s best player of the Asian board game Go in a five-game match. Go resembles chess in the deep, complex problems it poses but is even harder to play and has resisted AI researchers longer. It requires mastery of strategy and tactics while you conceal your own plans and try to read your opponent’s.

Mastering Go fits well into the ambitious goals of AI research. It shows us how much has been accomplished and forces us to confront, as never before, AI’s future plans. So what will artificial intelligence accomplish and when?”

How many of you think that a robot might be a competing CDFA in the not too distance future?

Robo-Advisors

A **robo**-advisor (**robo**-adviser) is an online wealth management service that provides automated, algorithm-based portfolio management **advice** without the use human financial planners.

Robo-advisor (robo-adviser) Definition | Investopedia  Norton
www.investopedia.com/terms/r/roboadvisor-roboadviser.asp

ROBO ADVISORS



Kurtosys

DON'T PAY FOR EXPENSIVE
FINANCIAL ADVISORS

Wealthfront is
the fastest growing
software-based
financial advisor



INVEST NOW

BETTERMENT INVESTING REVIEW:

MAKE IT AUTOMATIC WITH BETTERMENT INVESTING



State of Robo Advising



Robo Advisors

Hybrid Advisors

Enablers



What the heck is an algorithm?

“an algorithm is a formula or set of steps for solving a particular problem. To be an algorithm, a set of rules must be unambiguous and have a clear stopping point. Algorithms can be expressed in any language, from natural languages like English or French to programming languages like FORTRAN.”

- Vangie Beal, Managing Editor of Webopedia.com

Examples of Algorithms

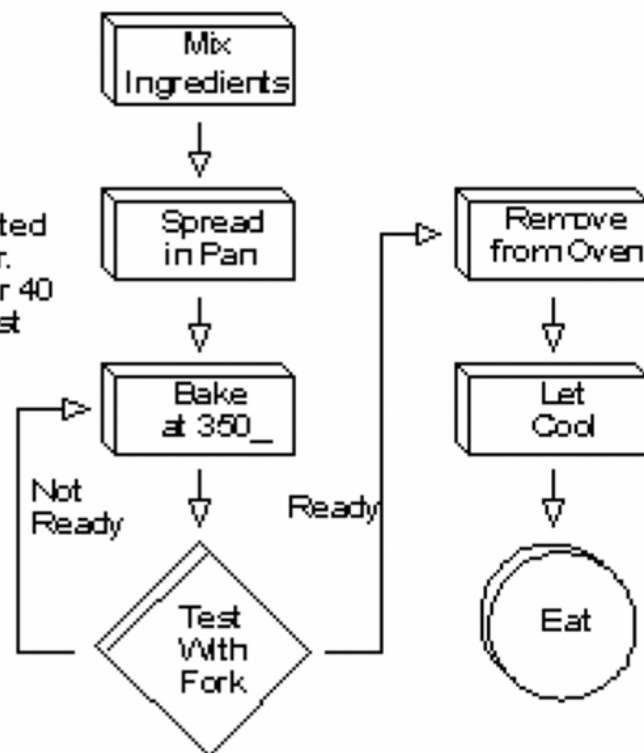
Recipe CHOCOLATE CAKE

4 oz. chocolate	3 eggs
1 cup butter	1 tsp. vanilla
2 cups sugar	1 cup flour

Melt chocolate and butter. Stir sugar into melted chocolate. Stir in eggs and vanilla. Mix in flour. Spread mix in greased pan. Bake at 350_ for 40 minutes or until inserted fork comes out almost clean. Cool in pan before eating.

Program Code

```
Declare variables:  
  chocolate  eggs      mix  
  butter     vanilla  
  sugar      flour  
  
mix = melted ((4*chocolate) + butter)  
mix = stir (mix + (2*sugar))  
mix = stir (mix + (3*eggs) + vanilla)  
mix = mix + flour  
spread (mix)  
While not clean (fork)  
  bake (mix, 350)
```



Robo-Advice

Initially

- Simplistic
- Asset allocation based on user's answers to simple questions

Offered answers to :

- Risk tolerance
- Portfolio rebalancing

Now

- More sophisticated
- Uses complex algorithms and behavioural analyses

Offers:

- retirement, trust and estate planning
- Help dealing with major life events
i.e. college, marriage and divorce

Costs less



- Now offering robo-advice to less affluent clients
- Previously never wanted
- Never able to cost-effectively service

**Is this something we
should worry about?**

Our work is different

Much more complicated

No two cases are the
same

A Robo-CDFA
can't do what
we do!

IBM's Watson

The image shows a Jeopardy! game board with three contestants: Ken (\$2,000), Watson (\$28,681), and Brad (\$4,600). The current question is about the medical condition Haemophilia telangiectasia elliptocytosis. The board shows the following scores and names:

Contestant	Score	Name
Ken	\$2,000	Ken
Watson	\$28,681	WATSON
Brad	\$4,600	BRAD

The current question is: **Haemophilia telangiectasia elliptocytosis**. The progress bar shows the following percentages:

Contestant	Percentage
Ken	0%
Watson	65%
Brad	11%

The progress bar also shows the following percentages for the current question:

Contestant	Percentage
Ken	0%
Watson	65%
Brad	11%



Search



IBM Watson

[What is Watson?](#)

[Watson Developer Cloud](#)

[Offerings](#) ▾

[Partnerships](#) ▾

[Careers](#)

[Blog](#)

What is Watson?

IBM Watson is a technology platform that uses natural language processing and machine learning to reveal insights from large amounts of unstructured data

Watch now (02:14)



The future of Watson

02:14

To embed its technology into KPMG's:

- Auditing
- Tax
- Risk assessments
- For business

IBM's Watson Lands A Job With KPMG

KPMG, the global global tax auditing and advisory firm, aims to use Watson's cognitive computing capabilities to look at volumes of data that, from a human standpoint, would be impossible to manage.

KPMG has made a new hire to help its knowledge workers innovate: an IBM computing system named Watson.

The global tax auditing and advisory firm on Tuesday said it will deploy the cognitive computing capabilities of IBM's Watson to its professional service offerings.

Will be using this to:

- analyze risk for lenders
- Mergers and Acquisition analyses
- Auditing services

Deloitte Forms Alliance with Kira Systems to Drive the Adoption of Artificial Intelligence in the Workplace

Mar 08, 2016, 08:45 ET from [Deloitte](#)



Deloitte.

As used in this document, "Deloitte" means Deloitte LLP. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients ...

NEW YORK, March 8, 2016 /PRNewswire/ -- Deloitte today announced an alliance with Kira Systems to bring the power of machine learning to the workplace, an innovation that could help free workers from the tedium of reviewing contracts and other documents.

Journalists and Bloggers

The news you need, when you need it.



EY the first professional services firm globally to offer a predictive analytic software platform that models human behaviour

Content

News releases

PR contacts

PR activities

Analyst relations

Share      



Tuesday 14th April 2015 - EY Australia has moved to acquire the business and assets of world leading Australian predictive analytics platform provider Intelligent Development Pty Limited, trading as ISD Analytics.

ISD Analytics' co-owner and founder Dr Don Perugini and co-owner Dr Michelle Perugini will join EY Australia's IT Advisory Enterprise Intelligence (EI) team as executive directors. ISD Analytics' employees will be invited to join EY Australia.

Deep Learning



Has enabled vast improvements in computer vision and speech understanding.

Loosely based on how the human brain operates & functions.

Machine learning teaches an algorithm to recognize patterns in data.

In Apple Debate on Digital Privacy and the iPhone, Questions Still Remain



TECH FIX
Oculus Rift Review: A Clunky Portal to a Promising Virtual Reality



Beijing Seeks to Tighten Reins on Websites in China

SoundCloud Starts Taking On Spotify

TD Direct Investing
With TD Direct Investing, I can...
Get up to 200 free trades.
Learn more
Conditions apply

TECHNOLOGY

The Promise of Artificial Intelligence Unfolds in Small Steps

By STEVE LOHR FEB. 28, 2016



Company - ENLITIC

- Focusing on field of radiology
- Using deep learning artificial intelligence to detect abnormal tissue in medical images

In Apple Debate on Digital Privacy and the iPhone, Questions Still Remain



TECH FIX
Oculus Rift Review: A Clunky Portal to a Promising Virtual Reality



Beijing Seeks to Tighten Reins on Websites in China

SoundCloud Starts Taking On Spotify

TD Direct Investing
With TD Direct Investing, I can.
Get up to 200 free trades. [Learn more](#)

TECHNOLOGY

The Promise of Artificial Intelligence Unfolds in Small Steps

By STEVE LOHR FEB. 28, 2016



“Enlitic has tested its software against a database of 6,000 lung cancer diagnoses, both positive and negative, made by professional radiologists. In research soon to be published, its algorithm was 50 percent more accurate than human radiologists”, Enlitic said.



FBI Tests Technique's Ability to Unlock Other iPhone Models



Tesla's Model S Gets Orders for 125,000 Vehicles



Pentagon Focuses on In-Orbit Satellite Inspections and Repairs



Video Creators Are Frustrated With Facebook's Antispirating Efforts



John Backus: Pioneering Programmer

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Testing to Start for Computer With Chips Inspired by the Human Brain

\$1 million computer has 16 IBM microprocessors designed to mimic the way the brain works

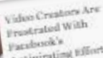


Lawrence Livermore National Laboratory will test this computer built by IBM using 16 specialized chips inspired by the workings of the human brain. PHOTO: IBM

12 COMMENTS

By **ROBERT MCMILLAN**
Updated March 28, 2016 9:58 p.m. ET

“The U.S. government lab will begin testing a \$1 million computer, the first of its kind, packed with 16 microprocessors that are designed to mimic the way the brain works.”



YOU ARE READING A PREVIEW OF A PAID ARTICLE. [SUBSCRIBE NOW](#) TO GET MORE GREAT CONTENT.

Testing to Start for Computer With Chips Inspired by the Human Brain

\$1 million computer has 16 IBM microprocessors designed to mimic the way the brain works



Lawrence Livermore National Laboratory will test this computer built by IBM using 16 specialized chips inspired by the workings of the human brain. PHOTO: IBM

12 COMMENTS

By **ROBERT MCMILLAN**
Updated March 28, 2016 9:58 p.m. ET

- Called “True North”
- Developed by IBM
- Contains 5.4 billion transistors
- Stimulates 1 million neurons
- Developed to enhance the deep learning process
- Only requires 2.5 watts of energy

Robo-Advisors 2.0

WHERE MUNI BOND ETFs MAY FIT
IN TODAY'S PORTFOLIOS

4:00 P.M. - 5:00 P.M. ET | TUESDAY, MARCH 29, 2016

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InvestmentNews

REGISTER

Exclusive: Robo-adviser Marstone has partnered with IBM Watson to deliver cognitive computing-powered advice

The service will help advisers create and manage investments for clients

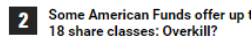
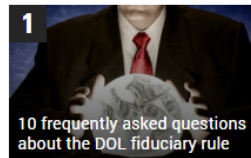
Mar 21, 2016 @ 1:23 pm

By Alessandra Malito

132
Shares



MOST POPULAR

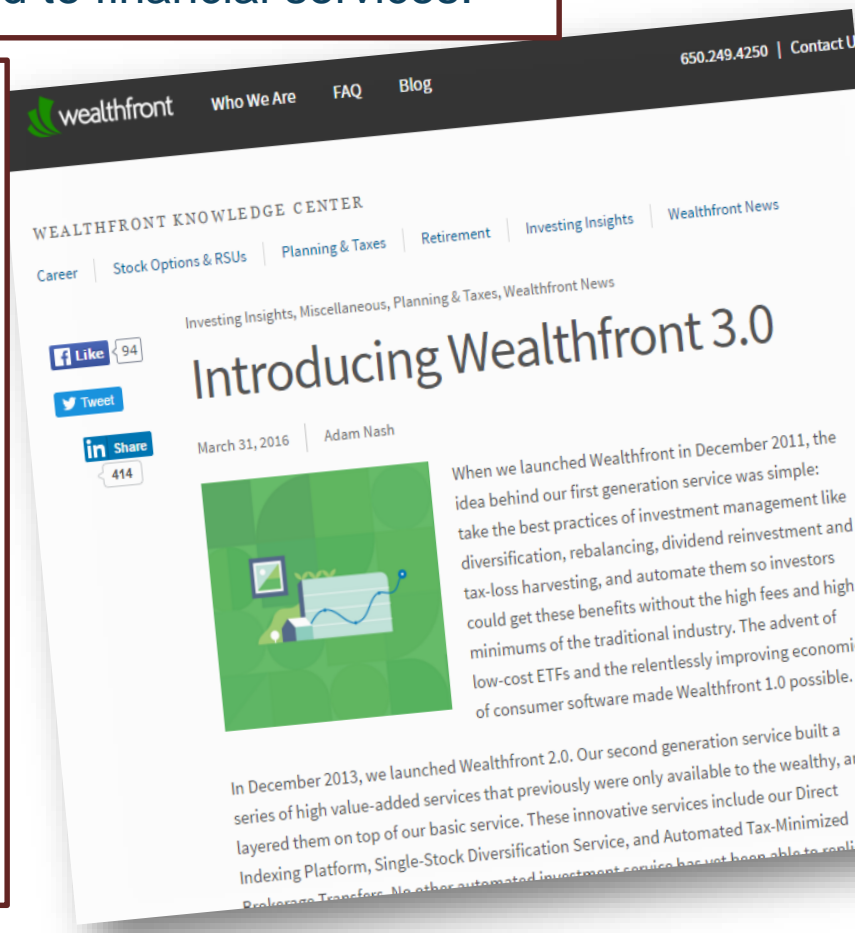


The article further stated that “Marstone's platform will offer digital advice supported by cognitive computing, which is self-learning technology that uses data, patterns and natural language. With Marstone Powered by Watson, advisers will help clients throughout the entire process of planning and managing investments by managing data, analyzing behavior, identifying trends and being predictive.”

“Today, we are on the cusp of something even bigger: the rise of artificial intelligence applied to financial services.”

“We believe that over the next decade, artificial intelligence is poised to transform our industry. The entire fabric of the financial system will be rethought, redefined and rewired.”

We’re firm believers that artificial intelligence applied to your actual behavior will provide far more powerful advice than what traditional advisors offer today. The reason is quite simple: actions speak louder than words. Observed behavior can’t be fudged on the phone or lied about in person. More importantly, observed behavior may reveal insights about ourselves that we aren’t even consciously aware of.”



“On March 9th, the world was stunned when Google DeepMind defeated legendary Go player Lee Se-dol. Over the next decade various forms of artificial intelligence will be brought to bear on every industry, including financial services.”

“We believe the ultimate financial impact of artificial intelligence on society will be far bigger than what we are building at Wealthfront. These changes will not just impact the next few months or years, they will continue to accelerate over the next few decades.”

The image shows a screenshot of the Wealthfront Knowledge Center website. At the top, the Wealthfront logo is on the left, and navigation links for 'Who We Are', 'FAQ', and 'Blog' are on the right. A phone number '650.249.4250' and a 'Contact Us' link are also visible. Below the navigation, the text 'WEALTHFRONT KNOWLEDGE CENTER' is displayed. A horizontal menu includes 'Career', 'Stock Options & RSUs', 'Planning & Taxes', 'Retirement', 'Investing Insights', and 'Wealthfront News'. The main content area features a social media sharing section with 'Like' (94), 'Tweet', and 'Share' (414) buttons. The article title is 'Introducing Wealthfront 3.0', dated 'March 31, 2016' by 'Adam Nash'. The article text begins with 'When we launched Wealthfront in December 2011, the idea behind our first generation service was simple: take the best practices of investment management like diversification, rebalancing, dividend reinvestment and tax-loss harvesting, and automate them so investors could get these benefits without the high fees and high minimums of the traditional industry. The advent of low-cost ETFs and the relentlessly improving economy of consumer software made Wealthfront 1.0 possible.' Below this, the text continues: 'In December 2013, we launched Wealthfront 2.0. Our second generation service built a series of high value-added services that previously were only available to the wealthy, and layered them on top of our basic service. These innovative services include our Direct Indexing Platform, Single-Stock Diversification Service, and Automated Tax-Minimized Brokerage Transfers. No other automated investment service has yet been able to realize



REVIEW & OUTLOOK
Trumping NATO



REVIEW & OUTLOOK
Facing Yale's Endowment



MAIN STREET
Yes, Donald
Could Beat Hillary



BEST
U.S.
Chief

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OPINION | COMMENTARY

The Young and the Economically Clueless

Millennials are flocking to Sanders, and in the GOP they favor Trump. Why are young people interested?



Bernie Sanders campaigning in Ypsilanti, Mich., Feb. 15. PHOTO: REUTERS

By DANIEL J. ARBESS
Feb. 19, 2016 6:31 p.m. ET

1429 COMMENTS

Bernie Sanders, the 74-year-old self-described democratic socialist, is surprising even

“Artificial intelligence and self-learning algorithms are efficiency-creating and cost-reducing, and soon they will be displacing service professionals and Ph.Ds just as they have factory workers. The Bank of England projects that 45% of jobs done by people in the U.K. will eventually be performed by robots. ArkInvest expects the U.S. to shed 75 million jobs in the next two decades.”

“The financial crisis was bad for banking jobs. The rise of “fintech” could be worse.”

“A new report by Citigroup Inc. forecasts retail banking automation could spur a 30% decline in banking jobs across the U.S. and Europe over the next decade. That would be the equivalent of eliminating nearly 2 million jobs.”

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More Industries Edge Higher

A Sm of Wall Street Privilege Faces Fraud Charges

The Markets Have a Message: Don't Believe This Rally

Housing Market's Health Put in the Test

Stocks Cash in King

MONEYBEAT

Citi: Technology Could Cost Two Million Bank Employees Their Jobs



PHOTO: RICHARD S. LEVINE/ZUMA PRESS

By **TELIS DEMOS**
Mar 30, 2016 8:47 pm ET

0 COMMENTS

The financial crisis was bad for banking jobs. The rise of “fintech” could be worse.

A new report by Citigroup Inc. forecasts retail banking automation could spur a 30% decline in banking jobs across the U.S. and Europe over the next decade. That would be the equivalent of eliminating nearly 2 million jobs.

The report is a broad assessment of the potential impact of financial technology, or “fintech,” on the global banking industry.

SPONSORED CONTENT

Advisor Insights

4 budget changes you need to know now

READ MORE

Lower the volatility in your client's portfolio

READ MORE

If top accounting firms are using artificial intelligence to:

- analyze mergers and acquisitions
- risk for lenders
- contracts and other documents behind business activities
- providing auditing services

Why can't artificial intelligence do what we do?

What can we do to survive the inevitable appearance of the Robo-CDFA?

1st step

**Acknowledge this is
happening and will
probably happen faster
than you think.**

2nd step

Fully embrace it!

Numerous firms currently offering a white label Robo-Advisor

Can brand with the look and feel of their websites



Can reach out to less affluent clients

Will open up an entire new segment of the population who were never able to afford your fees, but still desperately need help with the financial aspects of their divorce.



Robo-CDFA



- Will democratize the availability of divorce financial advice for the masses
- Provided for a reasonable flat fee
- Fully automated, requiring little/no involvement
- Will bring in new and substantial revenue stream

Robo-CDFA



- Analyses and crunching of numbers done for you
- Automatically figure out possible alternate what-if scenarios, run the numbers, put it in a report and email to you and your client?

Robo-CDFA

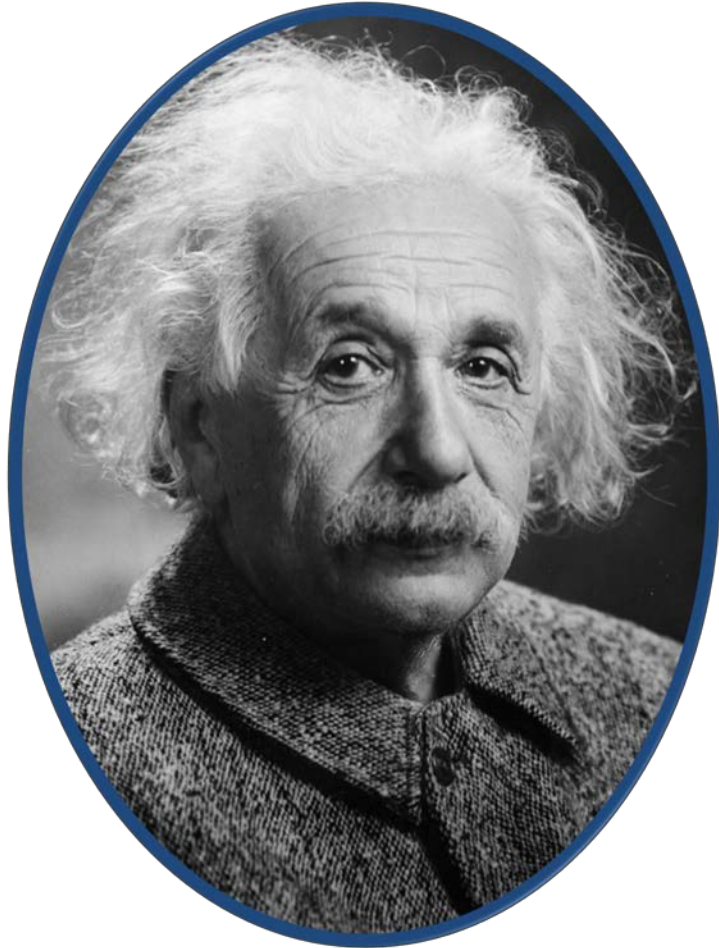


- Much faster
- More efficiently
- More accurately
- More cost-effectively

Your Role

- Help interpret and explain the analyses
- Offer higher-level services





Knowledge without
understanding is useless

**"Any fool can know.
The point is to
understand."**



Higher-level Services



- More hand-holding and involvement
- More robo fees = limit hand-holding to a few high-paying clients

Higher-level Services

- Divorce financial services
- Finding divorce and other types of attorneys
- Helping them sell their house
- Buy or rent a new house
- Selling their art and jewelry
- Car purchase or lease
- Vocational training
- Starting, buying or expanding their business
- Home makeovers
- Body makeovers (private trainer, plastic surgery)
- Dating services

Concierge-type Service

Will need to get
heavily involved
in your
clients' lives



Concierge-type Service

Rewarding Top Clients: Concierge Service Tips - Ingrid Case

~ *Financial Planning magazine, December 1, 2012*

“offering these concierge services - which can be anything from securing opera tickets to vetting a potential spouse or setting up geriatric care for a relative - can be a way to strengthen relationships with clients.”

“When it comes to buying big-ticket items, for instance, some clients know what they want and where to get it, but they'd like someone else to negotiate on their behalf. It might be something they haven't done before, or they've done it before and it wasn't a good experience”

“...he does sometimes set clients up on dates. "We have a very good database and we take note of people who are interested in meeting someone”



Need to trust you way before
you've met them or had a
conversation

- How do you do that?
- How do you market your services?
- What are you currently doing and how is it working for you?

Niche Expert

Person or business that focuses on a very narrow and specific client base and develops products, services and marketing that are laser targeted directly to that client base.



- Accountant who specializes in working with home-based businesses
- PR consultant who works primarily with fashion industry clients
- Lawyer who primarily handles sexual harassment complaints in the high-tech industry
- Have a leg up on their competitors
- Are not generalists
- Have a narrowly defined specialty
- Are experts in their field

Niche Expert

What becoming a niche expert can do for your business:

- Will help you stand out from the competition
- Clients will know something about you
- You'll know exactly who your clients are
- Easier for potential clients to find you
- Advertising gets easier
- Can tailor your website to attract them
- You'll know what challenges your clients face
- A great chance for you to network



Niche Expert

The plan that will help you become a niche expert:

- Have a very narrowly defined group of clients
- Know their needs
- Provide solutions for them
- Stay active and visible in their world



Divorce Financial Advisor who works exclusively with women throughout the United States.

Could I have narrowed this down any further?

Who can tell me how?

Next Step

Why getting articles published in magazines, newspapers, and on the Internet will help grow your business.



Having your name in print immediately positions you as an expert.

- Read a column on how to improve your business
- You try that new thing and it really works
- You go back and read her next column

Author becomes one of those experts you respect and rely on for advice.

Buy their book

Send copies to your friends



**This woman is an expert because she's
a positioned herself as an expert**

Are you already having dreams of being published in the New York Times or The Wall Street Journal?

“Is this the best placement for attracting new clients and making more money?”

If you sell tractors and seed to farmers, you need to be seen where the farmers will see you.

- Local newspaper
- The Farmers Almanac
- Weekly newsletter from the local supply store
- Popular farm trade journals
- Internet sites

Knowing your client base is essential to your success!

Know where your clients are.

- What they read
- What they watch
- What they listen to

Tailor your strategy to speak directly to them.

How to reach them

- What Internet sites are they going to?
- Forums and blogs?
- Important trade journals?
- Chamber of Commerce newsletter
- Church bulletin
- Local papers



How to reach them

Get copies of the latest issues of these publications and read them.
Know them inside and out.

- What kinds of stories they publish
- Their writing style
- Are articles long and detailed?
- Just the facts ma'am and informational?
- Are editors looking for in-depth pieces?
- Or short pieces with tips, hints and how-tos?



How to reach them

Biggest reason for a rejection is that the writer didn't read the publication and didn't send something that was in line with their message and style.

So read and get a sense of what they want **BEFORE you hit the send button.**



What to write?

the blank page

What to write?

Keep a story file.

Issues that:

- Make you angry
- Make a great point
- Or simply of interest

Clip it and put it in a file.

- Creative answer to a problem that no one ever talks about
- Heated discussions
- Columnist who said something flat out wrong and you want to set people straight
- Latest celebrity divorce
- Proposed changes to the alimony laws

What to write?

- Write down one or two sentences that might make a great topic for an article
- Think about what your clients will want to read or find helpful and interesting



Remember...

Everything you write down can be erased.

Don't worry about getting it perfect.

Get your ideas on paper.

Retain your rights!

Make sure that you have retained all your copyrights and did not give them away to the publisher.

- Having a good attorney comes in handy
- Needs to be negotiated upfront with the publications
- Weigh the pros and cons
- It may very well be worth giving up your rights in certain cases

Intellectual property may be your most valuable business asset.



“Kick it up a notch!”

Use the media in your area to your advantage.

Tell people about it & keep telling them.

- Keep the press interested in you and your business
- Journalists are hungry for a good story - deliver it right into their hands

Every time you do something that's newsworthy:

- give a talk
- write an article or book
- create a new product
- provide a new service



You need to talk to the press about it.

“Kick it up a notch!”

**Your story needs to be compelling
and interesting.**

- Needs to have an angle that grabs the reader
- Must be unique



Journalists are not easily impressed

How do you find a great angle for your story?

Need to consider your niche clients and what they would like to read.

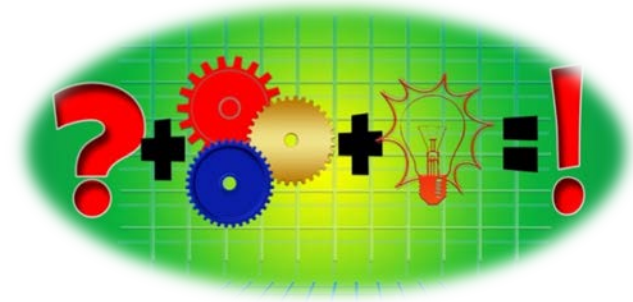
Your goal:

- Inform and educate
- Be knowledgeable and interesting
- Ideas should help them learn something about how to solve their problems and/or improve their lives
- Don't preach or talk down to them

Your hook should turn a dry idea into something provocative, controversial, quirky, or interesting.

Ideas to get you started

- Create a contest
- Solve a problem
- Make a discovery
- Host an event
- Make a prediction



- Be a philanthropist
- Be a hometown boy or girl who makes good
- Be the contrarian
- Become an advocate

Take that story to the press

Get them to sit up and notice you.

- Know your journalist
- Don't make the journalist work too hard
- Email them, unless they indicate otherwise
- Be flexible
- Make yourself available
- Say thanks



Very important to keep in mind!

May use all, some or none of what you talked about.

Take your quotes completely out of context.

- Thank the reporter for their time
- Do not bitch

Bite the bullet and thank them.



Press Releases

A great way to keep reporters and your niche audience informed.

- Create a compelling story angle
- Write out the details



Can go out to dozens or thousands of media outlets.

You can choose exactly where you want it to go.

Press Releases

A great way to keep reporters and your niche audience informed.

- Newswire services like “PR Newswire” can send your press release for a fee
- Email specific journalists you want to target



A great way to write down your pitch once and send to a lot of people.



Search Engines

YAHOO!

Press release will be posted and archived by search engines

- Your niche audience can find your press release by doing a regular keyword search
- Journalists use the search engines to gather facts and information about the articles they are writing

Potential clients can find you!

Radio Interviews

- Great way to get your foot in the door with the press
- Target shows that speak to your niche audience
- Try to get your interview aired during drive time
- Tuesday and Wednesday best days of the week
- Pitch them your story angle
- Stay local to hit your niche audience
- Do fewer interviews with bigger audiences
- You never have to set foot in the studio



Radio Interviews

How to ace your radio interview:

- Be prepared
- Know the program and the interviewer
- Send promotional materials and information before your interview
- Be brief
- Be charismatic and excited
- Be personal and intimate
- Repeat the question
- Put a sign on the door to your office or bedroom
- Use a landline telephone
- Be yourself
- Keep your eye on the clock
- Follow up



Print Interviews

- Come to the table with something to say
- Be interesting and have timely ideas - be specific
- Be yourself



- Let the interviewer lead
- Speak slowly
- Keep your eye on the message
- Know your journalist
- Be easy

Print Interviews

4 things you should never say in an interview:

“I'll tell you the dirt but it has to be off the record.”

“Am I prattling on?”

“Let's meet for a drink.”

“How could you write that?”



Print Interviews

- Call her and tell her you enjoyed the piece and liked working with her
- Let her know you are available anytime and would be happy to be a source

You have no control over what the press will say in the article



Let it go and accept it as part of the deal.

A New Purpose

- To help you position your practice for the future
- To get you more connected to your clients.

A new purpose focused on meeting the demands of your niche audience with new products and services

PURPOSE



Teleseminars

Seminar or interview that you conduct over the phone



- Arrange a time for the seminar
- Post an invitation on the web for everyone to see
- Let your clients, colleagues and email list know all the specifics beforehand

When the time comes:

- They call into a specified phone number
- Listen to you answering questions in an interview format
- Provide your expertise

Teleseminars

**Can also create an interactive exchange
with small groups of your clients**

- Can open up the lines so they can ask questions
- Freely exchange ideas with each other

**Think of this as one big conference call where you can
conduct weekly or monthly telephone coaching,
consulting, and/or brainstorming sessions.**



Teleseminars

**What's the best format for
your first teleseminar?**

The Interview

Where YOU get interviewed



- Format allows you to craft a list of questions that support your message
- Someone will interview you - should be someone who knows you and your business

Teleseminars

The Interview

Where YOU get interviewed



The interviewer:

- should speak slowly and clearly
- should know your business
- should not take away from your spotlight by talking too much
- job is to be the conveyor belt
- should introduce the teleseminar
- say a few words about your background and what makes you the expert
- should tell the audience what the guidelines are for the talk

Teleseminars

The Interview

Where YOU get interviewed



Preparation

- Write out the questions ahead of time
- Practice them and do several run-throughs with your interviewer
- Remove anything that falls flat or is off message
- Have the questions in front of you during the interview

Teleseminars

The Interview

Where you interview another expert



- Interview someone with some cachet in your niche
- A treat for your listeners

This is a team sport

Teleseminars

The Monologue

- You talking to your clients and them listening
- Great option if you're a dynamic speaker
- Requires intense preparation

Don't drone on about some boring subject

Needs to be compelling and attention-grabbing



Teleseminars

The Q&A

- A great alternative as a way to check in with clients
- Helps if you are skilled at coming up with answers off the top of your head
- Like hosting a coaching session



A compelling format for really working through people's issues and challenges

Can be pretty grueling
Probably not the best choice for your first teleseminar

Teleseminars

Formats for your first teleseminar:

1. The interview, where YOU get interviewed
2. The interview, where you do the interviewing
3. The monologue
4. The Q&A



Teleseminars

To charge or not to charge?

Suggest 1st one be a freebie:

- Will help you get your feet wet
- Create a closer connection to your clients
- Keep it simple

The freebie is a great way to establish yourself as an even bigger expert, increase your mailing list, and keep you informed about your client base and their changing needs.



Speaking Engagements

"According to most studies, people's number one fear is public speaking. Number two is death. Death is number two. Does that sound right?"

This means to the average person, if you go to a funeral, you're better off in the casket than doing the eulogy." ~ Jerry Seinfeld



Public speaking can be a great way to let your niche audience learn about you and your expertise which will hopefully help you get new clients.

Q&A

