

Ceci Uses A Guest Presentation to Increase Financial Counseling Sign Ups

–Created 1/20/22 by Colin Ryan & Ceci L, a College Financial Literacy Specialist

Goal: Ceci is preparing for a guest financial presentation to students where her #1 goal is to get students to book a financial counseling appointment with her.

Result: Ceci got 8 appointment sign-ups through this workshop! (Even though the QR code malfunctioned.)

How We Did It: Understanding that we relate most to people most like us, Ceci told them a story about a student she supported successfully, to show her expertise and to show she helped him in a manner that honored his values, not just lectured him.

We created two specific pieces of content with two specific objectives:

- a) **An opening story** to help them **feel comfortable & safe with her**.
- b) **A closing exercise** to make **signing up incredibly convenient**.

Ceci's Opening Story: I Helped a Student Be Generous Without Going Broke

I'm Ceci, I'm the Financial Literacy Specialist here at _____. I want to tell you about a student I was working with. Let's call him Mike. Mike comes into my office because somehow his \$700 had turned into \$0. He's worried about his finances.

I say, "No problem, let's dive in. Where did that \$700 go?"

He laughs, a bit embarrassed, and says, "I'm not sure. My mom always says 'spend it while you have it.'"

And I say, "That's funny, I like that. Can you think of anything specific you spent the \$700 on?"

He goes, "I like to spend money on other people. I took everyone in my family to dinner. And I bought my sister art supplies at Target for her birthday."

I say, "Mike, that's awesome. Wow, you're a generous person! I'm so glad you're generous. It also sounds like in this case it had a downside. Would it be okay for us to talk about ways we can help out your generous side so it doesn't add stress to your life?" And that's what we did!

Working with Mike reminded me that sometimes we make unconscious decisions with money that **support our values but don't support us**. I want to help you tap into your values without adding stress to your life. And believe it or not, personal finance is one of the best ways to live your values.

(The delivery time for this story is under 2 minutes, and launches into her talk by creating a relaxed and engaged feeling in the room. From there, she can dive into teaching her audience...)

Ok, so today I want to share with you 3 misconceptions people have about financial literacy.

But first, what is something important to you that you want to make room for in your life?

(Now she gives her presentation 2 or 3 points.)

Ceci's Closing exercise to book appointments:

2 or 3 minutes before time is up, end your talk and say, "I have a final thought for you, but before I share that, I want you to take out your phones. Got 'em? Ok, take a photo of this QR code. Got it? Ok, now you'll see that you're at our appointment booking page. If you don't want an appointment, no problem at all. But if at any point today you thought, "Yeah, this would be helpful for me" then all you have to do is pick a time. I'm making it really easy because I want this to be easy for you!"

Now pause and smile and wait for at least one minute, no talking unless you're answering a question, so they can focus and do it.

Then say, "Ok, last thing I want to share with you is a great question I saw recently: 'Are you living the kind of story you would want to read?' Personal finance is definitely a way to help you live a great story with your life, and if I can help you in any way to have less stress and more happiness around money, I'm here to help!"

(By ending on a final uplifting thought, you don't seem like your whole goal was to get sign-ups.)

If you would like to get more sign-ups for your upcoming events, your resources, or more email addresses so you can follow up with them, steal this approach and create your engaging personal story and closing exercise.

If you would like help creating your story, or a story for one of your peer financial counselors, [schedule a free, no-strings-attached coaching session with Colin here.](#)