

➤ SEMINAR SECRETS WITH FRANK

The Seminar Season Checklist



acquireup



Frank
MASELLI



Fall is here!

There's a crispness in the air. The leaves are turning colors, and football is back. That also means it's **SEMINAR SEASON!** Are you ready?

Here's a quick checklist of things you might want to consider to ensure your seminars have the tremendous business impact you desire (**Frank approved!**).

The Seminar Season Checklist

- ☐ Use a Great Handout Packet
- ☐ Use a Power Opening
- ☐ Use an Emotional Close
- ☐ Focus on Your 3 Main Points
- ☐ Tell Great Stories
- ☐ Check Your Visuals
- ☐ Perfect the Presentation
- ☐ Share Brief Opinions About the Economy
- ☐ Decide on Appointment Setting Techniques
- ☐ Use Humor & Audience Interaction
- ☐ Follow-Up Immediately with Purpose
- ☐ Prepare for a Great Q&A Session
- ☐ Use the Split-Dinner Format
- ☐ Get Help & Get Active

It's *Seminar Season!*
Are you ready?

— FRANK MASELLI



1. A Great Handout Packet

What you give people when they walk in sets the tone, and it's one of the most critical pieces for your success. At a minimum, you should provide a pocket folder with branded note paper, your evaluation or appointment form, a bio on you and your team, and an article on the topic or copies of key charts and graphs. For maximum impact, consider adding a **Personal Profile Interview (PPI)**, a simple one-pager that shares your personal and professional story in greater detail. It builds trust, creates connection, and helps people see the person behind the presentation.



2. Use a Power Opening

The first few minutes of your seminar set the stage for everything that follows. Use your opening to spark excitement and **show immediately that you're not like every other presenter**. A unique, energetic start, delivered with genuine passion, signals to your audience that they're in for something different and worthwhile. Get this right, and you set a powerful tone for the entire event.

3. Use an Emotional Close

The close is the most important part of your seminar. It's what inspires people to take the next step and picture their future with you. A strong close should **reinforce your core message, enhance your call-to-action, and leave a lasting impression**. Done right, it carries momentum straight into appointments and conversions.

4. Focus on Your 3 Main Points (MP's)

What are the three things you want your audience to remember about your topic? Three is the sweet spot for clarity and recall, so pick them carefully — then hammer them home. Structure your presentation around these points and creatively repeat them until attendees can say them back.

For example, in a seminar on "Taxes in Retirement," Frank's three main points are usually:

- Taxes are painful, brutally complicated, and filled with traps and confusion that cost you real money.
- For the first time in history, your taxes (or tax-like fees and expenses) could be **GOING UP IN RETIREMENT** because the government is broke, you have a ton of money, and they want it.
- There is still time to take action, and here are some ways the smartest people are protecting themselves.



5. Tell Great Stories

Choose three or four stories that illustrate and personalize your main points, and perfect how you deliver them. Decide not just what to say, but exactly where each story fits. **Placement is just as important as content and delivery.** If you plan to use a “Why Story” about yourself, keep it tight and never put it in the opening; that’s a rookie mistake that can kill your momentum.

6. Check Your Visuals

If you can’t read a slide clearly from the back of the room, change it or dump it. Seminars are primarily visual experiences, and **anything unclear on the screen is holding you back.** Learn to “build” your slides, revealing information piece by piece. It’s simple, keeps attention locked in, and instantly makes your presentation feel sharper and more powerful.

7. Perfect Your Presentation

Most advisors spend too much time reading from the screen and not enough time connecting with their audience. You don’t need to memorize every word, but **it’s essential to know your main points** and feel comfortable with the structure and flow so you can engage naturally.

For some serious help, use a “confidence monitor.” This will allow you to look like you’re maintaining eye contact with the audience even though you might be glancing at the screen for key talking points. Professional speakers rely on this trick all the time, and it’s surprisingly simple.

8. Share Opinions About the Economy

Whatever your main topic, start by acknowledge today’s financial world. Your audience has concerns and your perspective as a financial professional carries real weight—use it.

Keep it brief, factual, and apolitical. Share your honest take on current conditions, even if your message is simply: “We’ve navigated uncertainty before, and we’ll navigate this too.” This isn’t about having all the answers, **it’s about being a steady voice when people need one most.**

Every time they see related news, they’ll think of you—the media becomes your unpaid marketing team, continually reminding your audience that you offer valuable perspective and solutions.

Then transition to your main content. But don’t skip this step, it’s often more valuable than your prepared material.

9. Appointment Setting Techniques

Decide exactly how you're going to set appointments at the event. Will you use Post-It Notes, a giant appointment calendar, a sign-up form, a URL code or check-box on the evaluation, or some other method? Also, will you offer the "Mini-Consult" or Zoom call as options in addition to the face-to-face meeting? It's good to have choices.

Make the process easy and comfortable and give people something tangible to look forward to when they come in, like a branded report or a cursory analysis of some kind. There has to be a reason and a benefit for them to take this massive next step. It's a big emotional ask.

10. Humor & Audience Interaction

How can you make your seminars fun and enjoyable for the audience? Will you use quizzes, games, props, prizes, video, music? Or are you just planning to deliver a static, boring lecture? (Was that a leading question?)

Teaching advisors how to inject some humor and joy is one of the most valuable things Frank does as a coach. He usually starts with some mild self-deprecation and moves on to more advanced concepts.

The impact it has on your seminar success is immediate and dramatic. Even a little laughter can double your appointment ratio.

11. Follow-Up Immediately

What are you planning to do after the workshop to keep the fire burning and increase your **Appointment Kept Ratio (AKR)**? People cool off very quickly these days. Even if you rocked their world during the workshop, they will drift onto other things within days if not hours. You need a solid process to stay in touch and help them take that next critical step.

12. Do a Great Q&A Session

A great Q&A session is the **3rd most important part of any seminar** (behind the Close and Opening). But most advisors do it very poorly or skip it completely. This big mistake can easily be fixed.

Prepare by playing "20 Questions" with yourself or your team in advance of the seminar. It will help you feel much more confident and cement your credibility.



13. The Split Dinner Format

The Split Dinner format is where you do **Part 1 (The Challenge)** for about 25 minutes, eat dinner, then come back up for **Part 2 (The Solution)** after they are happy and well-fed. This puts the audience in the best possible mood for your seminar call-to-action and Power Close. It changes the entire emotional tone of the room and enhances your appointment ratio.

14. Get Help & Get Active!

Each point here is supported by scripting, PowerPoints, articles, and other tools that will help you succeed, covered in Frank's book, ***Seminars The Emotional Dynamic (5th Edition)***.

Millions of people need you right now and they are coming out in droves for seminars. Master these skills and you won't just grow your business—you'll transform it while actually enjoying the process. But authenticity and natural charm alone won't close deals. The bar has been raised. Today's audiences expect more, and your competitors are stepping up their game. **It's time to learn advanced presentation techniques, implement strategic engagement systems, and watch your conversion rates soar.**

Interested in learning more about the **Certified Seminar Master Program** with **Frank Maselli**?

Frank Maselli is the financial industry's leading seminar expert, coach, and author of the book ***Seminars The Emotional Dynamic (5th Edition)***. He is also the creator of the CSM Program (Certified Seminar Master) an online seminar skills training course for financial professionals.

To learn more, go to maselligroup.com/coaching/.



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