



Presents

## ***Using Stories and Real Life Examples to Help Others Take Action***



### ***for Retirement Professionals***

***A Hands-on Training Session***

***Designed and conducted by***

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## Using Stories and Real Life Examples to Help Others Take Action

### Goal and Benefits

**The goal of this session is to provide you with ways to help your systems' members accept, assimilate and act on your information.** Today more than ever, retirement professionals are competing with audience distractions and short attention spans of individuals who are used to being entertained. Instead of resigning yourself to that attention-draining fact, you can choose to practice drawing your listeners into your message with stories and real-life examples.

### To achieve the session goal, together we will cover:

- The myth of motivation and what you can change
- Ideas for choosing stories that help adults learn and retain key information
- Ways to become more familiar with your stories and ways to make them visual
- Worksheets for pulling out the essence of your stories
- How to add life/impact to a story with your voice and body language
- How to create/use visuals/props to add greater interest and impact to your stories
- Revisit some confidence-building approaches for sharing your stories/examples with greater enjoyment
- Practice sharing one or more of your stories effectively with helpful peer feedback

## The Myth of Motivation



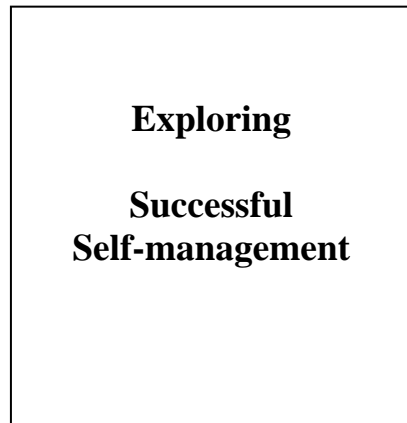
I can get you to do everything I want!

I can't get you to do anything I want!

By definition – all motivation is \_\_\_\_\_ motivation.

4. One emotion or reaction that I need to manage better is

1. One attitude that has served me well in life is



3. One gift or auto-pilot behavior that comes easy for me is

2. One skill I've learned or earned that helps me at work

### Four Principles of Resistance + One – True or False?

1. People are more apt to drop their resistance to you and your input when they perceive that you view the world as they view the world
2. People who are insecure are usually feeling insecure, protecting their egos, and perceiving that you are making them wrong.
3. People are more likely to buy-in to your point of view when you communicate short and long term benefits in ways that make sense to them. (Their self-interest)
4. People are more likely to buy-in to a change when they help create or are involved in solutions to the problems they perceive.
5. Stories can help our listeners better connect and get SELF \_\_\_\_\_.

## What Employees Want

- Employees want to know their employer cares about their opinions and concerns.
- Employees want to be productive and involved. The more the employee interacts with other members of the team, the greater the employee will be linked with the organization.
- Employees want to be appreciated and recognized for a job well done.
- Employees want to be paid competitively.
- Employees want challenging/meaningful work.



### **Benefits of Stories to Our Listeners/Audiences**

- Effective storytelling can be a beautiful art and entertaining
- Can cut across age barriers
- Will hold the interest and attention
- Can help recall and retention
- Can be remembered long after other data
- Can “reach” or “touch” people in unique ways
- Can set the proper tone
- Can open closed minds
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### **Areas I would like to help my listeners/audiences take action on**

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## Your Effective Stories Begin Here...

**Early Career Finances/Money Memories/Stories:** Possible point(s):

(Lessons from your family about savings, good or bad decisions that you or those close to you made)

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**Mid-Career Finances/Money Memories/Stories:** Possible point(s):

(Lessons from larger transaction/s, transportation, housing, savings, budgeting decisions)

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**Your Effective Stories Continue Here...**

**Late Career Finances/Money Memories/Stories:**

Possible point(s):

(Retirement savings adjustments, unexpected expenses, financial goals, mistakes / successes)

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**Retirees Current/Recent Financial Situations/Stories:**

Possible point(s):

(Retirement savings, monthly bills, budgeting, planning ahead, life challenges etc.)

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### Start Recalling, Collecting and Recording Personal Stories

*Your Personal History is Part of Your Uniqueness: Use it to Reinforce Key Points.*

**Sharing a part of your personal history to reinforce a key point can include:**

- a rite of passage
- an embarrassing experience
- a lesson you've learned
- an unforgettable experience
- a big achievement or failure
- talents
- travels
- things learned from OPE
- childhood experiences
- a close call

**Personal stories are best when they...**

- are relevant to the message
- are your own and are true... or you know the person/source
- take the a \_\_\_\_\_ into the story
- paint a clear p \_\_\_\_\_ to help audience retain the material presented
- I \_\_\_\_\_ the audience. Ask questions. *"Have you ever felt this way?"*

More of your financial experience stories:

Points they could make:

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*"Personal stories touch people through their windows of experience to see themselves, their lives and their memories in a fresh way."*



## Conveying/Reinforcing Your Point When Speaking

### How to Keep Your Audience's Attention

- Examples
- Questions
- Visuals
- Amazing Statistic
- Quotation
- Personal Stories
- Audience Activities
- Quick assessments
- Definitions
- Analogies
- Comparisons
- Benefits
- Bold Statement
- Repetition
- Visualization
- Prioritizing

### Body Language



- Eye Contact
- Facial Expression
- Expressive Gestures
- Energy/Enthusiasm

### **Story Telling Confidence Grows with Practice**

You owe it to your audiences to keep it interesting and supportive of your point. You can help to make sure listeners are engaged by using a combination of the above methods. It's your job to get and keep them engaged. Remember there are no bad audiences.

**The more you practice using stories the more skilled you will become.** Describe the characters and set up the situation; help others experience the character's feelings if possible. Don't be afraid to try different delivery methods (like changing your voice or stance) when describing a dialogue between two people in which he said... or she said... Have fun with it and be creative. You will learn from both your story telling "practice" experiences and the audience reactions.

**Remember no one can learn from your experiences if you don't share them with others!**

## Persuasive Speaking Preparation Sheet

Topic: \_\_\_\_\_

My Presentation Goal is: \_\_\_\_\_

• Intro - Present Situation (problem story): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

• Proposal: \_\_\_\_\_

**B** \_\_\_\_\_

\_\_\_\_\_

**O** • Advantages: \_\_\_\_\_

\_\_\_\_\_

**D** \_\_\_\_\_

• Disadvantages (with disclaimers): \_\_\_\_\_

**Y** \_\_\_\_\_

\_\_\_\_\_

• Action Plan (next steps): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Conclusion (the last thing I will say): \_\_\_\_\_

\_\_\_\_\_

## Generating Real-Life Examples with Interactive Questioning Practice

(Based on adult learning – Inform, Associate, Experience and Confirm)

### Sample

**Inform:** *By show of hands, how many of you know someone who retired before they were ready?*

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**Associate:** *Okay, now by a second show of hands, in hindsight, how many of them would have done a few things differently?*

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*Now jot down one or two things that you actually learned from that experience*

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**Experiment:** *I would like a volunteer or two to share their observation or experience with that person and a lesson learned... Who is willing to do that?*

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**Confirm:** *So what can you share with your target audience of one or more from that experience that is insightful, helpful or educational?*

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## About Your Training Session Leader

Process Improvement Consultant - Joe Tabers, CSP

Joe Tabers is an exceptionally engaging conference speaker, inspirational workshop leader and executive coach. He has studied skills for developing human potential for over fourteen years and helped thousands of individuals increase both their personal and professional effectiveness. **Joe is an expert in improving workplace trust, communication and relationships. Over the last twenty five years he and his business partners have helped over 300 organizations enhance workplace effectiveness by strengthening leadership and team communication skills with practical how-to approaches.**



- ☑ Since 1984 Joe has personally conducted over 3,000 programs in more than forty five states and three countries.
- ☑ He has authored over a dozen practical skill-building workbooks in direct communication areas including: Effective Presentation Skills, Management/Supervisory Leadership and Organizational Teamwork.
- ☑ Joe's hands-on process improvement experience includes extensive advanced training in effective meeting facilitation skills, interactive group process skills and problem solving and action planning skills.
- ☑ As president of Productive Training Services, Inc. Joe enjoys helping organizations and individuals create more productive and meaningful workplaces and careers.
- ☑ He and his associates have helped clients to win millions of dollars in new business through high-level presentation and persuasive communication coaching.

Joe is a twenty-three year member of the National Speakers Association (NSA) and is one of less than 10% of their 5,000 international members to earn the designation of **Certified Speaking Professional (CSP)**. **CSP is the highest earned designation from the National Speakers Association.** It recognizes a commitment to ongoing education, proven experience with a variety of audiences and ethical behavior.

He is a past President of the Professional Speakers Association of Michigan and is active in several non-profit leadership roles. In every session he conducts, Joe's goal is to make a difference, not just a living. He lives in Ann Arbor, Michigan with his wife, Betty and their two sons.