

# The prep talk

The prep talk is the conversation you have with the boss (meeting organizer) before the meeting takes place.

This talk is one of the most important parts of your speaking business because it is where you will set up your entire workshop and you will create the conditions to close people for your appointments.

The prep talk will allow you to create a perception of massive value for your training (think how they would treat Bill Gates, Beyoncé or Bono if they were to speak at their company) so the boss will promote the event for you.

Most of your money (conversions) is made during the prep talk

You must reserve 10 – 15 minutes for every prep talk. It is worth your time!!!

If the company is big and you believe there will be multiple speaking opportunities, you may want to do the prep talk face to face.

The boss really wants to connect with you, sometimes he does not know it yet because he has wasted time in the past with “less than” speakers.

You and the boss are a team and you are there to help their organization to improve their most important asset, the health of their staff.

You must believe that your talk will be the best training session their company will ever have.

Most of the time your CA will email the boss and ask him/her to set up a 15-minute meeting over the phone to discuss how you can customize the workshop for them.

When you do a prep talk properly, you will address the major “conversion blind spots” that can cause you to achieve poor results:

- » You agree on the allotted time to speak (minimize surprises)
- » The decision maker knows that you will take action at the end (no surprises)
- » The employees will be able to sign up for your consultation
- » The decision maker is there during your talk
- » You have time to close
- » You will maximize attendance and promotion
- » You may attain company support (optional)

I encourage you to read this script and make it your own (put it in your own words, etc.). You can adapt this script when doing talks for chambers of commerce, churches, mastermind groups, etc.

# Pre-Prep Talk Strategies

Make sure you have a powerful, positive and confident mindset before you call the boss. Here are some strategies:

- » Get into a peak state with your body (singing, doing incantations, push-ups, etc)
- » Ask empowering questions: a) How can I be in a strategic, resourceful and magnetic state right now? b) How can I align with this boss right now?
- » Do research on the company:
  - ✓The company mission:
  - ✓The company values:
  - ✓The company creation story:
  - ✓The company's recent successes:
  - ✓The company's new business initiatives:
  - ✓Company news / press room:
- » Do research on the person:
  - ✓ Background:
  - ✓ Education:
  - ✓ Hobbies:
- » If possible, be in a quiet place so you can focus on it.

» Make sure you have researched recent stats about health-related issues that impact companies. Think in terms of their perspective, what is important to them and how can you solve their problems?

» Stress in America

» Absenteeism

» Presenteeism

» Health and work performance

» Ergonomics

**During the phone call:**

✓ Make sure you call them by their first name

✓ Match and mirror their voice

✓ Use words like “our,” “we,” “together,”

# The Anatomy of the Prep Talk

## (Opening the call)

Hi, \_\_\_\_\_ (decision maker's name), this is (your name), Dr. \_\_\_\_\_, the speaker for our upcoming event, how are you doing?

I am excited to connect with you and set up a framework for our lunch and learn/training/name of the talk that we are having together on \_\_\_\_\_ (date) at \_\_\_\_\_ (time).

## (Building rapport and add credibility)

### Ex #1

"I was preparing for our meeting and I read that you guys just got funded \$30,000,000, that is great news! Are you guys expecting large growth or anticipating hiring new team members?" (**company news**)

### Ex #2

"I was preparing for our meeting and I learned that you guys were founded by a group of educators. That is so awesome! My mom was a teacher! Do you do a lot of workshops for your employees and clients?" (**company story**)

- a) Company success
- b) Company new initiative
- c) Company mission
- d) Company value
- e) Company news
- f) Company story

What is your favorite part about working at \_\_\_\_\_?

## (Setting the frame)

As a health and wellness speaker, I know that health and performance are directly related. The healthier the team, the higher the performance (1). I hope to share some of these valuable ideas so your team can take their

performance to the next level. I am curious, what are some of the goals or business initiatives that your team has for the next 12 months? **(you will leverage this information to use later on)**

### **(Current situation)**

So let's talk about your team.

Who will be attending the event?

What is the demographic of the team?

How many people do you have at your company? (calibrate)

How many people do you expect in our meeting?

What are some of the health and wellness initiatives that you have in place?

How is the team responding to these initiatives?

### **(Find the problem)**

At most companies I speak for, I find there are people who are extremely healthy, and others that do not pay much attention to their health at all. Do you find that to be true in your company? (yes)

Overall, if you were to rate your group on a scale from 0-10, (**0** being unhealthy, taking extra sick days, having poor energy, lacking engagement and not performing at their peak level, and to **10** being super healthy, rarely missing work, super engaged and being able to sustain their energy during the entire day), where do you think your team is?

(wait for a response, the boss will say less than 10. Let's say 6)

That makes sense, you and your company are not alone in this. I hear similar issues from other leaders all the time.

As a matter fact in America (here is the place for you to use some stats to build up the pain, and if you have a story, you can add it here also)

In your opinion, what is preventing your team from being at that higher level?

(no time, excuses, eating poorly, lack of exercise, stress)

**(Induce enough pain for the boss to see the need for change)**

You mentioned that your team is about a 6 on their health and wellness rating, do you feel that has an impact on their productivity, performance or sales? How?

**(Release and anchor to the solution)**

The great news is that I am coming to help you improve this situation. I believe that health is the foundation of performance and the vehicle for you and your team to achieve \_\_\_\_\_ (you connect with the their goals, mission, vision, values, etc.)

I am planning to do our “Stress Management Lunch and Learn” (how the talk was promoted) and go over many of these issues.

Personally, what would you like your team to believe, do and feel at the end of my workshop? (or you can ask: Is there anything in particular that you would like me to cover during our workshop?)

Perfect!! I can definitely talk about that! (you can also plant the idea of future workshops)

**(Future pacing the benefits)**

If we could accomplish these outcomes and eventually take the health of your team to a 9 or 10, what would that mean for you guys? How would that impact your business?

That is great!!! In the beginning of our conversation you mentioned that there are 200 people in your company. Do you feel that this message could benefit them as well? (yes)

Is it possible for us to invite them as well?

Does it help if I email you by bio and information about the workshop so you can send it to all the employees?

**(Pre Close and Close)**

This conversation has been great, now I have a better idea of how precisely I can help your company.

**(Closing the blind spots)**

My hope is that my visit to your office will not be the end but rather the beginning our relationship.

Usually what happens is at the end of my program, your team is going to feel really inspired to invest in their health. They will look at you and me, and they will say “ I want to go and see Dr. \_\_\_\_ to improve my health!”

I am curious, do you have a corporate wellness plan to support your employees who want to invest in their health?

(yes). Tell me more about it

(no). Got it. Most of the companies that we work with don't have one.

Obviously, I am there to help your team. The worst thing I can do as a doctor is to get the people excited about improving their health and not offer a follow-through program on how to do that.

What I do, after providing some awesome value, is offer them a special wellness consultation at the end of the program for those who are interested in implementing the information I cover. I believe you will really enjoy it.

I will be there 20 minutes before the meeting so we can connect! Do you plan to attend the meeting yourself? (If yes, proceed. If “no” or “I don't know” say, “You know, I've found that if the leader is not in attendance, the team will believe that trainings like this are not important, is there any way you can be there to support your team?”

I will start at 12:00 sharp and we will end at 12:30, does that sound good?

One last thing. I've found during these workshops that the more I know about what is important to the audience, the more I can customize my talk and the better results they get. I have developed a one-question anonymous survey that the companies that I work with send to their team members so we can learn more about their goals. Again, it is anonymous, so they do not need to put emails or names, that way they feel super comfortable sharing their health concerns. If I send you this one question very-quick survey, is it possible for you to send it to you team members? If you want, I can also send their answers to you later. That is fantastic!!

What is the meeting agenda? What takes place immediately before and after my presentation?

**If you want to go first and then close (you will need a break) you can say:** “considering that our message is so powerful and energetic, why don't you have me go first so your team can be excited about learning the entire morning?”

**If you want to go last and close you can say:** “considering that our message is so powerful and energetic, why don't you have me go last so your team can go back to work on a high-note and conquer the day?”

Thanks \_\_\_\_\_, all I need now is the address of the meeting and your email so I can send you the marketing material and our survey for your team. (confirm address)

Thank you!

# Post-Prep Talk Strategies

After your prep talk is over, it is your job to keep the meeting hot

Remember, your job is to align with the meeting organizer and help her to promote you inside the organization

There are several strategies to keep the meeting hot

- ✓ Email your bio
- ✓ Email a survey with video
- ✓ Email a flyer
- ✓ Email a corporate wellness article that you found or wrote

Make sure your assistant calls the boss the week before: The reason we call the boss is to make sure everything will be ready for you. However, you do not want to give them a chance to cancel the meeting on you. Make sure you are NOT CALLING TO CONFIRM the meeting, you are calling to make sure everything is in place! You can say something like this, "Hi Bob, we are calling you to let you know that Dr. \_\_\_\_\_ is super excited to connect with you and your team and she has spent extra time creating a powerful presentation that you all will really enjoy! We will be there 20 minutes before the meeting so that we can connect!"

\*you can also verify the setup of the room in the event you are using power point, projector, etc.

# **Linking Workplace Health Promotion Best Practices and Organizational Financial Performance: Tracking Market Performance of Companies With Highest Scores on the HERO Scorecard**

**Objective:** The aim of the study was to evaluate the stock performance of publicly traded companies that received high scores on the HERO Employee Health Management Best Practices Scorecard in Collaboration with Mercer<sup>®</sup> based on their implementation of evidence-based workplace health promotion practices.

**Methods:** A portfolio of companies that received high scores in a corporate health and wellness self-assessment was simulated based on past market performance and compared with past performance of companies represented on the Standard and Poor's (S&P) 500 Index.

**Results:** Stock values for a portfolio of companies that received high scores in a corporate health and wellness self-assessment appreciated by 235% compared with the S&P 500 Index appreciation of 159% over a 6-year simulation period.

**Conclusions:** Robust investment in workforce health and well-being appears to be one of multiple practices pursued by high-performing, well-managed companies.