



At seebeyondnumbers.com, you've seen me talk many times about how to appeal to your client's right brain by telling stories.

Why? Because stories are fundamental to how we communicate as human beings. Tell the right story and you can capture attention, entertain, enlighten, persuade, and ... **matter**.

And all in the course of just a few minutes.

So we can all agree that stories matter ... but how do you tell them?

What, specifically, makes for a good story?

I want to share five critical components with you, and talk about how they fit into your marketing (which I'll call **mattering** from now on) and your financial planning business. We'll start, as every good story does, with the hero ...

1. You need a hero

All good stories are about *someone* (even if that someone is a professional monster or a talking toy).

The biggest mistake financial planners make is thinking that *their business* is the hero of the story. This is prevalent among a lot of insecurity-based advertising ("buy our service or you'll die friendless and alone"), but it makes for a selfish, easily ignored message.

To tell a compelling story, your customer must be the hero.

And what defines a hero? The hero of the story is *your customer who is transformed* as the story progresses, from an ordinary person into someone extraordinary.

In other words ...

2. You need a goal

Good financial planning businesses are about solving customer problems. To put it another way, they're about customer transformation.

You need to understand where your customer-hero is today, and *where she wants to go*.

What transformation is she seeking? Does she want a wealth transformation, a feeling transformation, a career transformation?

What will she physically look like when the transformation has taken place?

- What will she be able to do that she can't do now?
- What will she have?
- What will she believe?
- What new connections or relationships will she have?
- *Who will she be?*

Until you understand your customer-hero's goal, you don't have a ***matter***ing story, you just have a collection of anecdotes.

3. You need an obstacle

If transformation was easy, your customer wouldn't need a financial planner.

Obstacles are what make stories interesting. The gap between where your hero is today and where she wants to go is the meat of your compelling story.

There are often external obstacles to your customer's eventual victory, but the most interesting ones are nearly always internal.

What's keeping your customer-hero from attaining his goal? What external elements are standing in his way?

More important, what emotional and psychological roadblocks has he created himself? What inner limitations must he overcome to achieve his prized goal?

4. You need a mentor

If your customer is the hero, where does that leave you and your business?

If your customer is Luke Skywalker, you're Obi-Wan Kenobi. You're the wise mentor who can provide essential information and tools that allow the hero to attain his goal.

One difference between an empowering ***matter***ing message and the old-fashioned, insecurity-based toothpaste ads, is that you emphasize that your hero's journey results from her own effort and work.

Your business doesn't exist to swoop down and solve all of her problems for her. That would infantilize your customer, which is ultimately unsatisfying

all around. (Having a bunch of neurotic crybabies for customers just isn't that fun.)

Your business exists to guide, coach, mentor, and help.

5. You need a moral

When you're telling a **matter**ing story, it's always wise to explicitly spell out the moral of your story. The moral of your story is [your why](#).

So yes, use stories to show people just like your customer-hero overcoming obstacles and attaining their goals.

Yes, show how your business can mentor and guide customers to become better versions of themselves.

Yes, show how customers can overcome external and internal obstacles to gain what they're searching for.

But first, always start with why and circle back around and spell it out. Let the audience feel why you do what you do.

The most subtle and sophisticated stories make their audience *feel*. But the audience for those stories isn't consuming them in the sea of distraction that is the open web.

So don't be afraid to spell out your why. Be clear and direct. Clarity is golden.

Bonus: You need the truth

There's one more element of your story **matter**ing tool kit that's more useful than ever.

In an age of unparalleled digital transparency, you can make amazing wins just by telling the truth.

You can create a surprising business advantage by simply dedicating your ***matter***ing to answering customer questions — including those that were “inconvenient.” (Like “how much will this cost?”)

It takes courage (and finding that courage can be something of a hero’s journey of your own). But the more honest you can be about your business, about who you serve and the problems that you solve, the more loyalty you will find.

Every story needs a spark of something remarkable, so it can be remembered and shared. And in the world we live in today, honesty can be one of the most remarkable story elements of all.

To Your Success,

Ronald