

# 410- Amanda Setili

**Will Bachman** 00:00

Hello, and welcome, everyone, to this Umbrex presents event. I'm so excited to have Amanda Setili presenting to us today. Amanda is a good friend Umbrex member, she's been on the podcast twice before talking about her two books. And today, she's going to talk about events. So Amanda is someone who I so look up to, and particularly in terms of how she has created the series of in person events, pre COVID. Obviously, that brought together both other consultants but also a large number of clients in Atlanta. And that's something that, you know, not a lot of people managed to do of actually bringing clients together in person. So there's a certain magic to it, Amanda is going to walk us through a little bit of how she does it behind the scenes. So and I will you know, anybody is interested, I'm going to put Amanda's LinkedIn profile in in the chat, as well as her website. She produces a ton of content, she has a couple of books. So Amanda, let me turn it over to you. And thank you so much for joining.

**Amanda Setili** 01:08

Hi, everyone. You can see me right. Yeah, so I started running events to join clients together in 2011. So I've been doing it for about 10 years. And the reason that I did it was that I was spending a lot of time calling clients going around to see them having lunch with them. So there are four reasons. One was that it was just getting too time consuming. I just had a long list of people that I wanted to stay in contact with. And I just didn't have time to do all of that networking. So one was saving time two was to enhance my brand, three ways to develop content, or really wanted to know what people were thinking and get these ideas out. And I found that clients are not very good at getting their ideas out unless you help them do that. And the last reason was that often clients would call me saying, I'm gonna I really want to switch jobs, who do you know, who can you introduce me to? And I wanted to do that proactively. So I wanted clients to meet clients before they needed a new job, and to build a network of my clients in Atlanta, so that everybody was talking about me and referring me. And people have really, really appreciated it. So many people have said, Gosh, I really look forward to your events, I so much appreciate you running these. And so although I only do it two times a year, usually, it's been a really good thing for our business. So what I wanted to walk you through today will really stress that it would be most helpful if we could focus on tactical stuff. And I know that when I was, you know, kind of in the Should I do it, should I not 10 years ago, it really helped me for somebody to just say, Okay, here's what you do first, here's what you do. Second, here's what you do third, and then it got me started, and it was easy to accomplish. So does that sound good to everyone?

**Will Bachman** 03:09

It does. Amanda, it sounds great. And I had forgotten Amanda Should we just start with that mentimeter that we talked about, I have to do surveys just to get a sense of the crowd. So So before you dive into the thing, let me share my screen. And we want to get a little pulse of the crowd here. So share my screen. And let me present there we go. So if everyone can go to on their phone or on their computer, go to [menti.com](https://www.menti.com) that's [menti.com](https://www.menti.com) and just type in the code there that you see at the top of my screen. First is just just So Amanda kind of gets a sense of the room here. What type of events have you hosted in the past so we're kind of talking about pre COVID here, but you could also make it you know

virtual events as well during during COVID. And you can do multiple choice here so you can put in multiple, it's like multiple things. We have one on one meetings. I'd be surprised if someone is not organized at least one one on one meeting small group breakfast medium size, large events. With a speaker with a panel I was the speaker or you organize the conference which I'm super impressed if you've organized the conference three people have organized a conference Holy smokes. Okay, so I love watching these things pop up. Okay, so everybody's organized a one on one meeting and we have a lot of people have done a small group event with two or three other people. We have 10 people so far who have done some kind of medium size like decent sized eight to 20 people. 12 people have done a large event with 20 plus 10 people have done a split with a speaker eight with a panel to the panel. Wow. And at 19. They were the speaker, and six they organized a conference. So that is that. And then we have one more question to give Amanda a sense of what we're goals are here. So just free form here. What are what are your objectives for hosting an event? And this could be events in the future? You came today, obviously, because you want to, you know, get some tips and tricks on hosting events. So what are your objectives? What are you trying to accomplish? And I'll read these off as they come in. Sales, client referrals, selling, create value, boost the brand, eventually win clients, brand amplification and leads business development, enhancing the brand sales, help attendees meet each other sales, build relationships with senior leaders, share thought leadership, business development, and thought leadership and build business authority. Build brands stay connected with recent clients and potential clients and to educate create awareness, business development and drive policies, drive policies, that's interesting. Share sales, knowledge sharing consulting. Okay, so just about everybody respond one more, in the end more client engagements is the goal for all activities, hoping to learn more about how other consultants have built opportunities. Okay, help people work with one another. Okay. So a lot of interest in business development, and in, in creating opportunities. So I will pause, share, sharing my screen here. And let me see stop sharing. And Amanda, back over to you.

**Amanda Setili 06:50**

So first of all, I'm really happy that most of the people on the call, have experience already with running these things, because that means I'm gonna learn something from you, which is fantastic. And it also means that you've done this, so you have some nuanced questions that we can all solve together, which is fantastic. And definitely my goal, my underlying goal was definitely to drive business. But one thing I didn't see so much in your mentimeter answers was creating content. And that was another objective of mind that, you know, I think is pretty important. Because when I started this in 2011, I had this vague idea of strategic agility, which I had trademarked. And I didn't have that much content around. So how would you do it? And so my breakfast series was called the strategic agility Think Tank. And I got tons of ideas from clients using this format, which I was then able to put into my first book, the agility advantage, and then into my second book, fearless growth. So that was kind of a side benefit, or of running these things. So let's jump into some of the details. And please stop me at any time during this to ask questions. And we're going to try to have a breakout toward the end where you all are going to have in groups of three, come up with your own idea for your next event. What would the topic be? Who would you invite? Where are you going to hold it and things like that. So keep that in mind. As you're seeing all this jot down notes about what you would like to do for your next event, and how you might be interested in either adopting some of these ideas or learning from some of the other people on the call. So now, let's see if I can share effectively. What do you see now? Will? It's good? Okay, good. All right. So the way that I've organized these action steps is by weeks prior to the event.

So in the left column, you'll see an eight that means eight weeks prior to the event, this is the stuff that I would recommend you do. So first of all, decide on a topic and a format. Second, invite speakers and panelists and pick a date. So I wanted to say that I often do number two before number one. So what I do is when I'm having a conversation with someone that I find fascinating, it occurs to me during that conversation, this person would be a great speaker for my series. And I say, Hey, would you ever be interested in speaking to a bunch of my other clients about some of the things that you've got going on at your company? And they've always said yes, like, everyone is happy to do this, which is fantastic. And then I help to help them shape the topic based on what they have going on that would be useful for other people to learn about. And if it's somebody who I know is going to be definitely a really strong speaker, I'll have just one Speaker, but often I'll have two or three, because I think it just adds variety and makes it applicable to more different people and kind of creates less pressure on the speaker to have to come up with 30 minutes of content, they just need to be part of a panel. So that works really well. So then, of course, book, the venue, venue, decide on menu, how are you going to lay out the room and stuff like that. And whether virtual or in person, you would need to do this because if it's virtual, you need to just set up the zoom event and things like that, creating an invitation list, which may be easy for you if you manage your contacts really, really well. But if you don't, you may need to just book some time for yourself to clean up your distribution list. If you're going to do some snail mail invitations, make sure you have their addresses, tried to get phone numbers and things like that. So I wanted to put on the list. For some of you, that's very easy if you have an excellent CRM system. But for me, it was always kind of a thing that I needed to set aside some time for. And then enlist a co worker or friend to help greet people take notes and manage venue issues. If it's virtual use, it would still be super helpful to have that person to put the spotlights on and off, keep an eye on the chat, handle any technical problems that occur and things like that. For me, that's my husband. So a spouse can be a great partner in that respect. But it's a good idea to get someone to help you if you don't have anyone. Any questions on that part? Okay.

**Will Bachman** 11:38

So let me see.

**Amanda Setili** 11:49

Ya, why is it not advancing? Well?

**Will Bachman** 11:56

Well, I SEE SLIDE eight, or no, but no, it's weeks until eight. Slide one, huh? I guess you're doing page down. That's kind of the obvious thing or arrow key.

**Amanda Setili** 12:07

Hold on. It's paging down on my my here, but not on yours.

**Will Bachman** 12:18

Maybe maybe stop. Maybe we're having trouble with it, Amanda, maybe just like, stop sharing it. And then we'll just we'll just I mean, stop sharing it as a presentation and just show it on your screen as normal. Hold on. Or if you'd like I can I can share it and then I can be Slide Master. Yes, please do that.

**Amanda Setili** 12:41

That's way better.

**Will Bachman** 12:43

I will be the slide master. Okay. Let me call out.

**Amanda Setili** 12:46

This is a perfect illustration of my last point, which is why you need a friend to help you with your virtual presence.

**Will Bachman** 12:55

Let's see here. I can sharing. So Alright, so yeah, if you stop hearing I will share.

**Amanda Setili** 13:07

Let's see. Alright, a good slide to kind of hold on a minute.

**Will Bachman** 13:23

Margarita. Do you see slide two?

13:26

Yes, I do. It looks like

**Amanda Setili** 13:28

okay, so seven weeks before the event, start doing things like getting a headshot and a quote from the panelists. And when I say quote, I mean, it would be really nice if you had either a former participant or your current participants, to just give you a little testimonial that you can put on your invitation that says, you know, Amanda, subtleties strategic agility, think tank is the best thing going Don't miss it or, you know, some other endorsement of that type. And be sure to ask your panelists who else they would like to invite because they often have a boss, a co worker, or a client that they met might wish to get to know that they would like to invite and what I tell them is, it doesn't even have to be someone you know, it could be someone you want to know. So if there's anyone that you as a panelist would like to be in the room, please let me know and I will try to get them there. And I found that that's a really good way to expand my network. Um, we six weeks out, create and send invitations so what I found is that you got to try to reach people every different way of reaching them because some people don't read their emails other people don't listen to their voicemails some people don't look through snail mail. And if you really want people to show up, especially for the important people, the people that you really are targeting for this event, or that you really like to get to know better. Especially for my first couple of events, I just reached out every single way I emailed them, I sent them something in the mail I wrote a handwritten Note on everything that I sent by snail mail, I called them to follow up. So once I got momentum, I started doing it where I was just sending out virtual invitations. But I've noticed that I didn't mean virtual invitations, I meant email invitations by mass email, like Constant Contact or something. But I've noticed that that doesn't work nearly as well for getting the people that you really want in the room. So I would advise you to set aside some time just for working your network through all these different means. And I figured it wasn't really a waste of time, even if they couldn't come, at least it was

a touch point with them to remind them that I'm doing this, that I'm still very active in developing my intellectual property that I'm still very well connected in my business community. And that just leaving a message or sending an individual email, not a mass email was another way to reach out to folks and just keep them in my keep myself top of mind. Week, five weeks out, follow up with individual emails, phone calls, etc. and ask your best contacts and attendees who else to invite. So at this point, you'll be getting some rsvps. And or you may be calling people who can't come. And you can say, Who else would you think would be great to have here who would add to the conversation who would get something from this, and who would be good for me to get to know, you'll be able to grow your list really effectively that way? I think I started out with like 130 people on my list. And now I've got something like 650 or something. And that's all just by just continuously, just asking and adding. Okay, next slide will. Okay, so this is a picture of one of my most comprehensive invitations, this was a paper invitation. But you could have put all of this stuff in an email. So I just wanted to point out some of the things that I did that I think you don't always have to do. And maybe this was over the top. But this was stuff I included, I included testimonials from people who had been to past events, I included pictures of the people, I included a pretty compelling description of why you should attend and what the benefits were. I included, of course, the venue information and the time and everything. But then I included a list of all the companies that had attended in the past. And I think that was a real credibility builder for saying what other kinds of companies are coming to these events, you need to be there. I'll mention later that as I as it gets closer to the time, and you have a really solid attendee list, when I'm sending out the final reminder, like, you know, don't miss it. You haven't registered yet, please register for this event. If it's of interest, I then say who's actually coming. And I don't say that names, I just say we're going to have somebody there from the following 10 companies. So that's been really helpful. Any questions so far? Okay, keep going. Well, thank you. Yeah, so four weeks out, be sure to set up a 30 minute phone call with each of your speakers or panelists to make sure that they feel comfortable with where to show up when but more importantly, what are they going to say? So what I found is a lot of clients don't know what about their business is so interesting to other people. Especially because they feel like they're not really getting that much done. Like they're feeling like, well, we did that. But it really didn't work that great. And I'm thinking based on everybody else, I'm talking to you guys, this is like a great best practice, we need to share this with other people. So you need to give them confidence. And you need to be able to spot the things that are really extraordinary about what they're doing that might be helpful to other people and would get the conversation going. And I find that that's very helpful. They typically don't come with that idea. I help them distill that idea out of everything that's going on in their work life. And of course, at this point, send out a reminder email just for more follow up calls. You can see there's a recurring theme here of driving attendance, week through t minus three. This is optional, but I found it to be quite effective is people who can't come set up individual meetings with them either just because you want to spend time with them. Or you could say something like I'm so sorry that you have a conflict on that date. If you would like we can set up a meeting for the following week and I'll just debrief you and kind of share some of the top takeaways with you. So that's a good way to get you know, just get to spend more time with people that you really value and will advance please Okay, so this is a one week out, right? So you're in the week before your actual event. And you need to do things like create your run of show, make sure that you've got the introductions down solid, make sure you understand your own talking points, questions that you're going to ask how you're going to close. And if virtual, just decide how you're going to handle hand raising and questions and stuff like that. So one of the format's, that I found to be very effective is at the beginning of the event, you, you ask people to write down what

problem they would like to solve for themselves as a result of coming to this event. So ask people to just jot down like, you know, what's the one thing that you hope to get out of this event, and that kind of keeps their mind listening for a problem that's really happening to them back at work, which I think makes the whole meeting more effective. I often start off with a little bit of information about, you know, my own content. But it's more about what are we all going to learn together today from this panelists, these panelists and this discussion, the questions that I asked the panelists are never the same for everyone. It's usually fairly tailored to the different panelists like, Joe, you've had some real success with, you know, agile teams or whatever, what have you experienced, and then asking different questions to each person so that you really bring out the best in what in what they have to bring to the to the group. It's really good at the end, if you can summarize concisely, what you know what the takeaways were. So keep that in mind as you're listening and taking notes during the, during the event. Coach, the speakers and panelists on what will be most valuable to attendees that we already kind of talked about, but something that I've never done. But as I was writing up this list, it occurred to me that I probably should have done it is draft the highlights email to send out post event before the event. So if I'd been smart, I would have just drafted the highlights email, even though I didn't know what people were actually going to say. But at least that would have given me a huge starting point to getting out highlights email immediately after the event. Because often, what I find is I've had such a big drive to get to the event and to get people there and make sure that the panelists were prepared to make sure that everything's gonna go well, that I'm just like, really not in the mood to do more work on it right after the event. So if I had prepared myself better by drafting the highlights, email, I could have gotten that out more timely, easily. Create a seating, chart handouts, name tags, tent cards, and signage. Now, all of this whole thing, this whole list is like everything I could think of, but if you only do a third of it, you can probably still have a fantastic event. So don't worry too much. If you just don't, you know, do everything on this list that I'm giving you. But I'll tell you what I did, I did round tables. And I chose who was going to sit at each table to make sure that the most important people were going to be with the other most important people, or that there would be just good chemistry at the tables. And that people would be able to see well and things like that and actually prepare those table tents so that people's names would be on the tables. And that way, when people look around the room, they can see all the different companies that are represented, which I found helpful. And signage, I always had the hotel, develop a branded sign at the exit to the elevator from the parking lot so that people wouldn't know the way to find to the event. Yeah, so if you were doing this virtually, you wouldn't really need to do any of that. Send an email reconfirming your attendance and mentioning the other companies that will be there. Just to make sure that people get there even you could have an assistant call your attendees and remind them about the event and reconfirm their attendance. And you can email individuals to suggest people that you think they should meet. So you'd say well, I really hope that you can meet David fields when you're when you're there next week, because I think you and he would have a lot to talk about. And that way when they get there, even if you don't have time to physically introduce them, they know that they need to meet each other, which just creates so much value from the event I think. Next slide, please. Sure.

#### **Will Bachman 24:48**

Oh, just one thing on the name tags is we've found that there's a particular brand of name tags that that we've been using an Umbrex events that people seem to like which are random Just going out and getting the cheap EDP kind of like my name is Dickie tags, there's these ones and I'll put a link and

Amazon link in the chat, it's a these tags that you can slide in the name and then as a little magnet for the back so it fits on people's shirts, and they don't have to pin the pin through their shirts. Another nice one is one that you can like hang over the neck. So think about like the just the branding of that little detail, and it's something that people appreciate. And go to the next slide.

**Amanda Setili** 25:28

I agree with that i my name, our name tags, and table tents always had our silly logo on them as well. So Oh, we can also optional, you can send attendees or pre read pre work or questions to consider. I don't always do that. But it could be a good idea. Then the week of the event, the sum, okay. Okay, so at the event, obviously have the event. That's for topics, speaker and speakers for the next event, I actually have a little form that they have to fill out at the end, my main objective is not to say whether they liked it or not, because they'll probably give me a good grade, whether they liked it or not. My main objective is to get ideas for next time. And that has been very helpful. And actually a couple times people have recommended themselves as speakers. And they've been fantastic. So make sure to get ideas from other from people who attend about what they'd like to see in the future. send out a highlight email afterward, not only to the attendees, but to the people who were invited to let them know what they miss, send a thank you note or gift to the panelists and announced your next event. So at the end of the first event, tell them what they can expect in the future and start planning that event. And I think that's the end of my formal comments. So I think we should either go to the breakout group will or just have some q&a, there's a few questions in the chat that we might want to take a look at

27:06

a couple of good ones on choosing your panelists, if there's any specific criteria you're thinking of when you're choosing them. And if you've also, if you really feel like you need to know the panelists, if you've had any success with cold call panels.

**Amanda Setili** 27:22

I've never cold called the panelists, but I've definitely been introduced to a panelist with the top with the purpose of having them speak. And that's actually a fantastic way to meet people. So if you say to someone you do know who would be a great speaker for the next event, and they say, Margarita would be fantastic. I say, Can you introduce me to her, and I go speak to her. And she may or may not be a fit for the event, but at least I've gotten to know her. So that's good. As far as criteria, my criteria has been that they work for a company that people would recognize and see as a leader in my business community. And, you know, they need to be at a certain level in the ranking and SVP or a CEO or CEO C level or, or at least something that would be fascinating for other people. They need to be just an interesting person. That's the main thing. Some people are not that interesting. And other people are very, very interesting no matter what they're talking about. So that's been my big thing. Other questions?

**Will Bachman** 28:31

David A. Fields asked if you charge for the events? And if so, at what level do you charge?

**Amanda Setili** 28:36

I do not charge. In fact, I spend money on it. Of course, I have really nice food. It only cost me like definitely less than \$2,000 for the whole thing. And I have 30 to 35 people there usually. So I consider it to be a really good investment. I have not charged and I don't know if I ever will.

**Will Bachman** 28:57

Yeah. Yeah, it's it's, I found it's much, much harder to get people to come to a paid event, even if it's a nominal amount. Or if it's free. It just feels feels different.

**Amanda Setili** 29:09

Yeah, it's my gift to my clients. And they appreciate it. So that's awesome.

**Will Bachman** 29:16

So what we wanted, let's let's move into the breakout. What do you say, Amanda?

**Amanda Setili** 29:20

Yes. Yeah.

**Will Bachman** 29:22

So should I say introduce it, or do you want to introduce it?

**Amanda Setili** 29:25

Please do I think you had that idea written down?

**Will Bachman** 29:28

Okay. So what we're gonna do is we have 32 people. So we're going to split up into 10 rooms. So the magic of zoom will make it three people each. And the goal for this is we're going to take, let's say three people will take 10 minutes. And in the breakout. What we'd like each person to do is share any event that you would like to host right, and there's four pieces to that. So when you get in, you're going to share So what's the objective of your event? And I put this in the chat. So what's the objective of your event? Number two? Who is the audience? So who are you going to invite to your event? Number three, what's the format of your event? And Number Number four, what's the topic. And before we go to the breakouts, we're going to ask everyone here, we're going to go quiet time, we're going to take just three minutes. And everybody just reflect on that and think about it. So you can think about those four things. And the format that could be if you want, it could be a virtual event, or it could be an in person event, assume sort of post COVID, everybody's vaccinated. So it could be you know, a small group breakfast, lunch, dinner cocktail party get together, long party. Meal could eat not a meal. But getting together for content could be no content at all with content, a speaker, like Amanda's done, or a panel like a man has done, big conference. So think about what it is like to do or you know, could be a series of speakers with a big zoom thing. what's the what's the objective? What are you trying to get out of it? What's the audience? What's the format, what's the topic? So let's take three minutes. Now, I'll figure out if I can put a little timer up. It's 1232. At 1235, I'll make a little announcement, then we're going to go into breakouts, you'll have 10 minutes to share those with the three of you in the zoom and give some reflections the other day. And this was Amanda's idea. So her credit is you pay attention. Because when we come back for zoom, we're going to ask people to share an idea that you heard someone else

present. So that you thought was surprising or you know, caught your interest. So So pay attention to the ideas that you hear from your peers will ask you to share some of those. So three minutes starts now. Objective audience format topic.

31:55

This is an idea for a future event, not a share of a past event.

**Will Bachman** 31:59

Right? Thank you. Yes, a future event that you want to do. Okay, so we'll go ahead and go into breakout rooms now. So we have 24 people. And actually, let's just make it six rooms. So we'll have four people each will go into breakouts now. And then we will come back in 10 minutes. So 10 minutes, we'll come back to we have 10 minutes to share your ideas objective audience format topic. So here we go. Okay, how do I do the breakout breakout so breakout rooms? The breakout rooms? Six breakout rooms? Sign automatically. Okay. See you everybody. We're going to the breakout rooms. I think you need to accept your breakout room assignments. Yeah, I'm

34:13

on I'm on the treadmill. So well, when you put me in rooms with with folks that have been clients or prospects, it's like

**Will Bachman** 34:24

I did not even know that. It's totally random. Zoom must have done it in its wisdom.

**Rick Denton** 34:29

Yeah, I'm actually a little disturbed with the zoom algorithm. If it's a if it's doing this randomly. It must know a lot more about the non zoom interactions than what we realize.

34:41

That's scary to think about. So how much

34:45

time do we have? Well, because we have four people in our room.

**Will Bachman** 34:47

Yeah. So we now have nine minutes so we'll go ahead and start so Stacy, do you want to start us off?

34:56

Um,

34:57

I do not because before this session, I wasn't I've been thinking about it. But when I saw the topic, I thought, Hmm, that's a great idea. Let me just go and learn. So just in the last few minutes, I've thought about if

35:10

if the world was open, and I felt people were comfortable, I'd want to do an in person event. But I think in the next six months, doing a virtual event will probably best maybe a lunchtime or afternoon session, and invite nonprofit leaders local to Atlanta. I was trying to think through the topics and I say, nonprofit, because I would like to target that audience for my strategic planning services.

35:33

I would obviously want to have topics that are important to them. But question for you. Did Amanda say she spoke at all on this panel? or was she just highlighting the panelists?

**Will Bachman** 35:44

I think for most of her events, she brings panelists, so she sort of is the emcee. And and, and the question asker. But, and she might give a little bit of NC also help sum it up at the end. But she's not the main speaker. Okay, she has done an event where she's done a couple book launches. But for the events that she was talking about, then she was the more like, the facilitator.

36:10

Got it. So for me to come up with the topics, I think it'd be helpful to hear everybody else's thought right.

36:17

Around the horn, oh, my God, James.

36:19

Yeah, sure. So what I'd like to do, the objective of a webinar I'd like to present is demonstrating the merits of an organization effective tool I use called the game changing index quite a bit. The audience would be consultants that work on organization, effectiveness and driving impact of teams and organizations. And the format I would believe would be a webinar, just given the situation that we're in and the ability to host live events right now, here in the UK or elsewhere in the world. And the topic is, yeah, it's helping individuals, teams and organizations drive employee engagement and impact in their businesses.

**Will Bachman** 37:06

Okay. And is that a tool that people could actually sort of test out or test drive during the session? Or

37:14

during the session? What I do, I actually get them to basically take the assessment themselves. And then you could have some live questions during, during the webinar and share some of the insights from the group and how it works. And yeah, basically get a feel for whether people are interested in using this tool, how they could use it in their business, and if it will be helpful for them.

**Will Bachman** 37:41

That's super cool. All right. Well, James, we should talk. I mean, if you're interested in doing that, as an Umbrex event. Let's, let's talk about that. Rick, did you have an idea? Yeah,

**Rick Denton** 37:53

I've got one that's probably got a shelf life of only a few more months, and then one that's a little more longer term. And I'd like to do something around, likely a panel. So let me kind of I'm almost going in, out of order here. But this panel, and the reason is because I like would like to have global participation. As much as I absolutely would prefer to have folks in person, the idea of having sort of a global perspective, lends itself obviously the virtual environment, and the expiring ideas, the one of 2020, the year that not everything changed, or, hey, the pandemic didn't change everything. And I think there's a lot of talk around all that did change the pandemic, but there's some fundamentals of customer experience. And that's sort of the underlying thought behind it and bring in some panelists that would help amplify that, and reinforce some of those customer experience fundamentals for an audience. And I'm thinking that the audience would be and here's where I struggle died. This is the part that I might look for insight from the group more than what I can provide. But it's anyone who is responsible for those customer facing metrics. Well, one of those customer facing metrics is revenue as well. And so chief revenue officers, your marketing officer, your operating the problem with CX is as a discipline, it's not as well defined across all organizations. So focusing on targets, who are interested in delivering a great customer experience. Did I hit all the topics there? kind of in a windy ramble sort of way? I think the next topic I did say that was the one with a shelf life, right? You're not gonna be able to carry that forward 912 months from now, because the pandemic hopefully will be in our rearview mirror. But the other is just the concept of total voice of customer going beyond survey and score and into listen and act. And helping companies truly learn how to listen to their customers and do something about it.

**Will Bachman** 39:45

Great, any reactions to Rick's ideas?

39:51

Sound like good ideas?

**Rick Denton** 39:52

Well, thank you, David gave us a certain thing will come if the lack of engagement is there. Maybe I need to rethink my topics.

40:02

No, the Can I can I trust them that well, the Amanda actually didn't touch on this, which is interesting. So, um, so my, my experience with events has been the attendee having to manquer attendees is really important. Right, what she did touch on, but then your topic is important in the title of your topic will make a difference. So, Rick up, I think it might be worth playing with your the how you title some of your topics, is the topics themselves are interesting. Just because you haven't got time against it yet. You don't have that grabby title for yet. So just just a thought, David, I

**Rick Denton** 40:48

will appreciate it. Hey, there's a nugget for me.

**Will Bachman** 40:52

Let me let me make when we get back to plenary, David, let me give you a space to talk about headlines and titles.

41:00

Oh, I really don't want to step on Amanda's toes. This is a this is Amanda show. No, no,

**Will Bachman** 41:04

no, no, no, I think in the last 10 or 15 minutes, it's really like getting ideas and additional point where

41:10

you do me a favor and check in with Amanda. Before that I okay, because I really don't want to step on her toes. I'm here as a participant today.

**Will Bachman** 41:20

Yeah. Okay. That's good. I will ease into any other. David, what do you have any ideas on client? I'm not

41:31

sure. So

41:32

yeah, so from from our standpoint, from what I'm trying to do, the event I'm trying to create, actually, so the objective is to give an opportunity for principle in my group, to be able to be on on stage without having to be presenting. So a panel format works better, right? I'm good presenting. You know, my principles are just fabulous in the work, and in coaching consultants, but they're not as good on stage. So I like the idea of being able to create an event where there's value for clients or for prospects, but it doesn't require the stage presence. So targets are going to be consultants, because that's who we work with. format will probably be virtual. I'm not sure there's a and we attract people from all over the world. So I don't, I think, you know, live is less appealing. The topic is, is TBD, we typically don't have a hard time when we are promised too many topics. But it'll probably be something if it's for solos, either around, you know, building the pipe or fees, or that balance of how do you work on the business? And in the business? Those are those are typically the kind of conversations. So that's where I'm thinking of, is how do we build something for that someone else could facilitate? Yeah.

42:57

What about you? Well?

**Will Bachman** 43:01

Well, you know, we're already doing a lot of events. But in terms of new things, I'm definitely looking forward to getting back okay, actually, no, I will share one, I will share one here. So, I'm planning on doing in terms of something new for me, I'm planning on organizing an event where this will be a little bit longer, there'll be a virtual session, we're going to use mural. And it's going to be about two hours long. And the goal is to actually crowdsource and create a piece of content, like sort of an E or E book length piece of content, crowdsourced using mural in a in a session,

43:48

so that will be so cool. Oh, my gosh, that is awesome. One year, and we're doing the the fishing line thing.

**Will Bachman** 43:55

Yeah. So yeah, we're doing the fishing line thing. Yeah. So. So I'm excited about that. I got the idea from Seth Godin. Who?

44:03

Awesome.

**Will Bachman** 44:04

He had a group of students one time organized. And you remember David, that we did the walk your dog backwards book? Yeah. Right. and book a couple years ago, where we took the content from the session, and then put it in Salt Lake into like an 80. page PDF. So kind of along the same lines, but

44:21

but but faster, and one on one session. I love that. Yeah, that is so cool.

**Will Bachman** 44:28

So let's, let's wait, I think I need to pull everybody back to plenary. And remember, go ahead

44:36

while you do that, if you actually wanted to do two, can I just do an introduction between Rick and Stacey? Yeah, of course. Just so you can go on your way. Just because Rick had had had emailed me separately. So I'm speaking out of school here.

44:51

And that's my permission. No, but

44:54

Stacy was at a solo practice accelerator.

44:56

Oh, yeah, sure.

44:57

So if you want to learn about it, You you've got someone right there. You could you could ask him some questions

45:06

on Stacy. I will reach out to you. Yes.

45:09

Please don't hesitate. It was awesome. It was awesome.

45:12

And Stacy. Do you know Jared Simmons? No, I

45:16

don't that name isn't familiar.

45:19

You're in Atlanta. Yeah. Yeah, he, um, make sure if you don't hear from me, we send me a note. I want to introduce you to Jared Simmons.

45:27

Sure,

45:28

I think is also an Umbrex. member.

**Will Bachman** 45:30

Yes. Yes. Umbrex. member in Atlanta, so yeah, definitely someone to know.

45:35

Oh, fantastic. Okay,

**Will Bachman** 45:36

I'm gonna pause that break very

45:38

well, by hijackers.

**Will Bachman** 45:41

Oh, rooms, closed rooms, right? Boom. Okay, leave breakout room,

45:47

seal.

**Will Bachman** 46:06

Give people another 30 seconds here to return to plenary. Let's see. If you would like if you would be brave to volunteer to share an idea that you heard from someone else? Go ahead and just pop your name in the chat and say yes, I will share otherwise off the call and some people. So go ahead and let me know who is interested in sharing an idea that you or someone else as people return? Let's see. Here. People come back. Oh, now we're up to 19. Okay, now it comes up. 2122. Everybody's back just about. Okay, good. Welcome back, everyone. And so what we want to do in the last 10 minutes is

share some ideas that we heard in the breakouts. And if there's any other ideas that came up around just organizing events. Amanda, let me let me turn it over to you. Do you have any, you know, thing that you want to add? Or, you know, you can let you kind of coordinate here on, on calling on folks to ask them for their, you know, their the ideas that they heard? And you're on mute, man?

**Amanda Setili** 47:25

Yeah, well, my breakout group was really good. So I'm gonna first call on someone from my breakout group, Betty, can you kick us off with some feedback from our group?

47:36

Yeah, happy to do that. So as Amanda said, is that great group really different ideas in terms of events, so just kind of we'll hit the highlights. Jerry is in Lagos, Nigeria. And she's looking at pulling together an event at a women's conference. It's for the extractive industries, so oil and gas and will be in person and the focus, the topic focus would be sustainability. And Trey or Amanda, please chime in, if I missed anything significant there. It's good. All right. And then Tom is in Houston, and looking at a different type of format. So it's a three hour event was three topics focused around costing for his clients, and audiences, really the procurement folks, so you know, two different flavors of ideas for events coming up.

**Amanda Setili** 48:36

Good. And since we don't have group numbers or anything, I'm just going to call on people. And if someone else from that group wants to volunteer, that would be fine. But Rick Denton or anyone else from Rick's group want to, to say what went on in your group?

**Rick Denton** 48:52

I'd be happy to speak but I sure hope that my group speaks up as well. So I was with David Stacy, will and I have lost the fourth person that was in our group. And I wasn't James there, I think perhaps. And we had as the others did a wide range of topics, I think the group universally settled in on the virtual style, I think we're all comfortable in that space. And that tends to be sort of the, the, the area that a lot of us play. I did a David's objective was interesting, in that what he's trying to do is elevate a particular principle in his firm. So the objective of having the event is take someone in his firm and be able to elevate their visibility on stage, in my words, not his but sort of a lower pressure environment of having that panel to where they can then get that stage presence, that stage experience and be able to drive it forward like that. James talked about his topic was focused very much on helping. You can tell I'm checking my notes over here, individuals drive employee engagement, working on this game changing index as a concept to be able to drive that forward from a event and would be targeting consultants that are responsible for that area.

50:05

Stacey,

**Rick Denton** 50:06

I have clearly did not do a good job of note taking, could you help amplify yours because I remember talking about virtual but then lost the thread I'm so sorry.

50:16

That is because I did not have a solid topic. So

50:18

your notes

50:19

are appropriate or lack thereof.

**Rick Denton** 50:24

And I think to the group did realize that there's a lot that goes into sort of brainstorming these events that you know, even coming up with a great headline is so vital. So you might have a good topic, but the headline itself needs to be catchy in our group spent time talking about that as a as an important piece as well.

**Amanda Setili** 50:41

It is very important.

50:42

Oh, wait, I'm

**Rick Denton** 50:43

sorry, there was one other, I hope I'm not taking too much time, Will's concept is one that was particularly intriguing, virtual using mural to create a crowd sourced mechanism to come up with a piece of content inside the event. So imagine the output of this event is an ebook that is created by using Miro with this crowdsource group across a virtual environment did not want to lose that one.

**Amanda Setili** 51:11

That's a really good one. And two, Niki, who is a member of Umbrex, has been running a number of really interesting events where she has invited other people from Umbrex to come and talk about a certain topic. And then she's creating white papers and podcasts out of that. And so we get quoted in her in her materials. And we also learn something by coming to the event, which has been great.

**Will Bachman** 51:36

Amanda, before you go to the next group, or calling someone else, I'll just jump in and mention, if someone came up with an event idea in your session that you would like to lead for a group of other consultants, then let me know. And we can talk about doing it as as a session for Umbrex and Veritux. So we're happy to entertain those. Back to you, Amanda. Okay, good.

**Amanda Setili** 52:00

All right. Um, Julie, can you say something about your group,

52:04

I'm happy to thank you so much. So Susan, and Kadar up to see if he's still on. Yep, we're we made a group for Susan's party was connecting people. And she wants to do this in a virtual way. And the operations and leadership space, what we talked about a bit with Susan's concept was that that topic can be very, very broad. So she was looking to focus the speaker to one person and the attendees to about 10. So there could be some meaningful interaction, and wanted to be really purposeful about setting the topic to be really specific, so that the conversation can go a little bit deeper. She also shared that she knows her audience fairly well, and that they appreciate cocktails. And so she'd be introducing an element of fun into her conversation, which I loved. And Kadar, I love that he was focusing in a business to business space. And he was really looking to close the aspirational gap between businesses, who needed to have more of a digital presence, but didn't have the scale to be like the Googles and Amazons of the world. So he was being very thoughtful from an audience perspective on how I bring the right group of people together, and the right content to be shared, that gives businesses an aspiration to want to take these steps in the digital space, and not aspire to Malays, which was the phrase that I am using my language there. But but a real company example to inspire to action, which I thought was great. And my event is for a product that I'm actually launching this spring, I'm supporting retailers and becoming more sustainable by coming together to do a virtual simulation on the circular economy. So I have a bit of a technology space. But as as the world starts to open up again, I'd love to have the opportunity to in really the excuse to frankly bring people together in a more collaborative space to work on a common business objective. And so those are our three topics.

**Amanda Setili** 53:59

That's really interesting.

54:01

Thank you.

**Amanda Setili** 54:03

I mean, the good thing about it is create it's, it's like a do gooder event, but you also get people to come who you would, you know would be great clients. So that's good but

54:14

great clients and in some way to Qatar, I also want to be able inspire people to take the first steps sustainability is one of those topics that's just so big and hard to break down. But the the point of the project would be that this is something you can do. It's very approachable.

54:28

Very good. Maureen, have we already heard from your group?

54:34

They're

**Amanda Setili** 54:38

about and have we heard from Anne's group?

54:45

Some of these Yeah. Hello. Sorry, guys. I need to leave you. But Eric or John or Elizabeth contextually it? Okay? It was amazing, but sorry. Have another meeting. Okay. Good. Thank you very much, Amanda. On Well, thank you.

55:02

Yeah. Eric, do you want to kick off?

55:04

Yeah, be glad to most of my team has now departed. So I'll just synthesize what I heard. It was interesting. Whenever one started with describing their objective, it came from their internal perspective, what am I trying to do for my firm? But as soon as they got the audience in mind, whoever they were trying to reach, they immediately shifted to what's in it for them. And it became all about how do we fit the topic in the format to fit that. And sometimes what they want is unclear. So I synthesize this idea that getting to know the audience and what's keeping them up at night is a precursor to defining the right topic.

**Amanda Setili** 55:42

Really good point. Really good point. Let's see, who have we maybe not heard from Mark, have we heard from your group?

55:53

No, not yet. Hey, Amanda, how are you?

55:55

Good, how are you?

55:56

I'm good. I'll do another summary as well. We got Margarita, Kristen, and one more. Everybody's moved around. The general overview. We all sort of chose we focused on like a breakfast group. for higher level executives, smaller groups, you know, which I think are good, conversational. So something where we are present for a little bit and then opened up for not quite speed dating, but you know, how can we get everybody to present their best practices so that the whole group can share? I rose raised the point a couple of times about you know, what's in it for them? Because I think we also gravitated into you know, what's best for our firm? What do we want, as opposed to maybe what, what they want? And but but some of the topics were sort of, you just know, those are the topics that people are interested in. So maybe that kind of went unsaid. And all of us chose venues that you know, would be nice. Buckhead, DC someplace where CEOs generally hang out. can't think of anything else. I don't know if Margarita, or Kristen or others want to interject anything. But I think that was a summary of our group.

**Amanda Setili** 57:20

I like that a lot. One thing that I found effective is if you have a few panelists that already have that best practice teed up, and you're asking them questions that directly bring out that best practice, because I

mentioned that people often don't know what their best practices, they don't realize how best The practice is. But then I leave a ton of time for other people to be talking like, we switch to q&a and group group discussion, you know, a half an hour into an hour long session.

57:49

Actually, that's a good point, do you think it's easier to get more people to show up, get involved, if you have a panel as opposed to just yourself?

**Amanda Setili** 58:00

I only do it with either a speaker or panel because I want them to know that somebody is going to be there that would be interesting to hear from. I don't know if they I don't maybe it's just my lack of self competence. But I don't know if they would come just to hear me because they can read my stuff. If they want. They kind of know what I think they want to know what each other think

58:23

I'd come to hear you, Amanda.

**Amanda Setili** 58:27

I'll have an audience of one at least.

**Will Bachman** 58:30

So I dropped a line in the chat, a book recommendation from this book by Priya Parker got a lot of press. It's called the art of gathering, which is great if you're thinking about organizing events. And you know, just kind of echo some of the things that I heard here, which is really thinking about it of not just your own personal objectives, but what is in it for the attendees, particularly around what are people going to get out of the event by attending that they couldn't get some other way. So Amanda, and I tried to almost roleplay that a little bit with this one where by having a breakout session and interacting, we were trying to not just kind of share content, but also help you come out of this with having created something yourself and built some connections. Right. Otherwise, the first 20 minutes of it, we could have just made that a podcast that you could have listened to asynchronously. Right. So what is the value of people coming to it other than, you know, just maybe giving you business right, would be valuable? We're at the top of the hour. Amanda, do you have any final closing thoughts for us that we should take home?

**Amanda Setili** 59:41

No, I'm just hoping that everybody is energized to actually go out and run an event soon. And I'm excited about all the ideas that came out today.

**Will Bachman** 59:50

And I'm looking forward to getting back in person. Thank you for joining. Again, if you want to organize an event for other consultants let me know. We're happy to about those. And we will Amanda, I got a few questions if we were going to be able to share recording this. And if we're able to share your slides what's what's the that would be fine. And also folks should connect to me on LinkedIn so

**Amanda Setili** 1:00:13

we can stay in touch.

**Will Bachman** 1:00:14

Oh, and I didn't put it in the chat, but I will send out an email to everyone after this with the link to the recording, link to Amanda's slides. This Virginia's of you and Amanda's LinkedIn so you can connect with her. So thanks, everyone, for joining today. Thank you.

1:00:31

Thanks. Well, thanks, Amanda.

1:00:33

Thanks.