

## **Episode 170: Check Out My Speaker On Boarding process**

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Dr. Mark T. Wade: One day of speakers asking you to speak on your summit and having sponsors reach out to you to pay you money. Well, then you need a stellar onboarding process. Let's take a look. Hey there summit hosts, Dr. Mark T. Wade here, founder of Virtual Summits Software and your host here on the Virtual Summit Podcasts. Um, I've got a pretty epic episode in store for you today, but before we jump into that, I just want to remind you to check out our resources area over <https://virtualsummits.com>. You can get some access to free trainings. Plus don't forget to check out our Summit Genesis Wworkshop, which is a three day virtual intensive from none to launch with your virtual summits. Plus keep on the radar. Summit Talks, our Summit Talks summit is coming up later this year. So be sure to check that out. And also, I just want to give a special shout out to Summit Fest Live, our in-person event that happens in New Orleans the first week of February every year, so I want to mention those now.

Dr. Mark: For today's episode, I want to actually talk about a speaker onboarding processes in the power of this and what it actually can do to help benefit your summit, not just your summit, but essentially all aspects of your summit. Everything from speakers, wanting to participate, to deciding, to promote, to being excited for it and telling other people about it, which ultimately bringing you more speakers to speak on your summit and how you can actually get people to start raising their hand say, no, I like to be a sponsor for your summit. These are two areas that many summit hosts have challenges in is one the speaker recruitment and outreach process, as well as finding sponsors. And I think it all comes down to an epic speaker onboarding process, which can remove a lot of the difficulties and increase your success in this areas.

Dr. Mark: So I'm going to talk you through my process. I'm here on the podcast. I'm going to explain it ver, you know, explain it so that you can understand it, but I'm also going to do a screen capture of this. So we'll put this in the show notes, as well as on our YouTube channel, you can actually go and see a screen capture of me walking through this, but let's kind of jump into it. So, first things first, when we are talking about an epic speaker onboarding process, it all starts with your speaker invite page. Now there's two different ways of doing this and we've talked about this a lot, so I'm not going to go into in depth conversation on speaker invite pages, but you either have your speaker one page, one pager or speaker invite page, like actually on a website, either one of them are great.

Dr. Mark: Um, obviously when you have a web page, it gives you more options of what you can do versus a PDF. But either way is this is setting the tone for your speakers, letting them know that you are professional, you're going above and beyond what most summit hosts will do. And so they're already going to be more interested in what you're putting together then maybe any other summit hosts, for example, and this is the first step is, you know, they say first impressions, uh, how much those matter. Well, the same thing is true when you're reaching out to your speakers. So again, I want to mention the PDF, the one-pager, our speaker outreach one-pager, summit one-pager, is just as effective,

but I'm going to walk through our web page. Now we've been using these. So of course we can just clone these and we update these to make them relevant for the summit that we're working on.

Dr. Mark: Um, so it's not that difficult for us, but it is going to take a little bit of time, okay. Depending on what you're going to add to it. Um, the most important aspects, if you think of your one-pager and your speaker invite page, almost as a sales page for your speakers, this needs to let them know one, it's got to be a sexy hook. Two, it's got a prequalify, let them know it's for them. And three, some credibility or social proof. So I always like to start off with something catchy, what it is, you know, ours here for Summit Talks says, I want to highlight you as a speaker, a virtual summit on virtual summits. I'd be honored to have you as a speaker on Summit Talks. We'd love to share your insights and wisdom about virtual summits. Now the most important aspect here is then I go into my speaker invite video, which goes in depth on all the aspects, Now is great and amazing as that is in a lot of our speakers, I'd say at least 60 to 70% of them watch the whole video.

Dr. Mark: Not all of them are going to, that's just the reality of it. Some, especially your bigger speakers, they're busy, but just the fact you have it, they may turn it on for a minute or, you know, 10, 20, 30 seconds say, okay, this is cool. And then they're going to scroll the page. So the next aspects of your page are really important. You can get as elaborate and comprehensive as this as you want, or you can give this simplified, even if you just had that title of your summit, a catchy hook, what it is, a little video, and then a way for them to sign up, you're already going to be above and beyond most of the other summits.

Dr. Mark: Now for mine. I have the video there, which is a relatively long video. I think it goes about seven minutes. I'd say to try and keep this between three and five minutes if possible. Um, but there was a lot of aspects I needed to cover some, I went just a little bit long now, right underneath that it's immediately just like a sales page and the opportunity for them to sign up right away, be a speaker on Summit Talks. And then that starts my speaker onboarding process. And I'll come back to that. I want to tell you a little bit more about the speaker invite page first. The next thing is in a way for them to immediately contact me. There's my email. We've got the Summit Live dates. They know when it's going September 28th through October 7th. And then I've got the promotional period scheduled there.

Dr. Mark: So they're knowing, cause most of these people know that if I'm asking them beyond the summit, I would like them to help me get the message out to their audiences. So I want them to immediately know the dates and the times of this so they can have that in their mind. Then the next thing is I want this to sound as easy as possible. So the next thing is next steps. One, schedule your interview, Two record your interview. Three, share Summit Talks. After that, we want to have some social proof or credibility. So this is now where I have a little testimony. So I have a testimony from Pat Flynn, from Smart Passive Income, talking about, you know, how much he enjoyed working with me and what I've got going on and that you should check it out. Now, if you don't have any kind of big thing like that, it's okay.

- Dr. Mark: If you have anything that kind of shows credibility. For example, um, my partner in our health company, she likes to put her TEDx talks right here as credibility. She goes, look, I'm not just anybody reaching out to you. I have authority. I have credibility. And I've been doing this for a while. So something that shows that, um, and then I have an as seen on. So the as seen on will, you know, help show them, um, the other areas. Uh, again, it's just so many, some social proof as solopreneur. Our Entrepreneurs on Fire, Screw the Nine to Five and Virtual Summit Podcast. Now sales page, right? I'm selling the speaker. So I want to let them know what's in it for them. Don't talk about what's in it for you. What's in it for them. So here I say, get rewarded as a speaker and I have all the different items that I'm willing to give them just for speaking.
- Dr. Mark: So free access, commission on every sale, opportunities to build your list, you get access to one of my programs. You get access to my software. Um, you get to put this into the thing. You get to have, you know, we're going to take your session and use it in other areas. And I'm going to recommend other speaking opportunities for you. Then I talk about collaborative market strategy. So I'm starting to set the mindset, let them know, Hey, you know this collaborative. It says everyone gives, everyone wins. So what is in it? What does that mean? What am I hoping they'll do? And then I go into the actual sales aspect. Now again, this isn't really a sales. This is obviously they're speakers on my summit. So I'm not selling them. They're not paying anything, but it's the same process. I want to convince them that this is an opportunity they want to be a part of.
- Dr. Mark: Now. Then I say, choose your participation level. So I give them four different options. Now we don't believe in a, we are anti list builder summits. We are not list builders or, excuse me, list grabbers. We are anti list grabber summits. And you know, you guys all know what we're talking about. Those summits out there, they're all there wanting to do. It was just scrape the list of the speakers. And you can tell just from the email outreach, it's like, you don't care about me. You don't even know who I am. You just want my email list. And a lot of times they'll start off being like, Hey, I want to give you an opportunity to be on this amazing summit. You would be fortunate to be on it. Um, you need to have a list of 5,000 people and you've got to send four emails or something like that.
- Dr. Mark: It's like, what? Like that is disgusting. Don't send emails out like that please. So what we do is we have our standard tier, which has no promotion. You want to be a part of it, but don't want to, don't want to promote it. No problem. If you've got a good topic and you can provide value to our audience, let's have this conversation. So then we have three other tiers that now may get what we ended up doing. This is how we get speakers to actually fight, to promote, fight over the spots to promote our summit is I give them some amazing things. We have a partner, the highest level partner, then prestige, and then featured. Each one of those featured offers some amazing opportunities on the summit. And then I give post summit deliverables. Prestige offers, more partner app offer some amazing things to where people are like we actually have to go and select.
- Dr. Mark: We only let three people have the partner level, but they have to have full promotion. They have to guarantee a certain amount of leads generated and they have a certain minimum requirement. Now we're not going to force you. You get to choose if you want that, you let us know you want that. But in order to get all of the amazing bonuses we're

going to add to you at that level, you have to also participate full out for example. And so we'll end up having, I think we had over 15 people apply to be on the partner level, which again includes something like seven emails and a minimum 1500 leads and a bunch of other stuff, social posts, et cetera. And we had to go through and sort through. And we had to say, look, sorry, we only got spots for three of you.

Dr. Mark: And we ended up selecting. So we actually create scarcity for our speakers to speak on our summit. And so then they're kind of competing over who gets to have, which aspect. Then underneath that, I said, well, here's the requirements, here's specifically at the partner level, what we expect, procedure level, feature level, et cetera. And then another little video of me talking about the promotional period. And then it's me say, Hey, Dr. Mark T. Wade here, information about me. This is just showing again, a little bit of credibility and authority. And then I talk about our goals, like what we're trying to do, let them know how we're planning on do it. Also here. I also put out that we'll be featuring and highlighting sessions from persons of colors and minority summit hosts. And let us know if you know anybody, that'd be great to speak on that.

Dr. Mark: And then I list out my interview schedule. So I actually go through and say, here is when I will be taking the interview. So please, you know, pick your times in these spots because I do batch recordings. Um, some days I have up to 10 hours back to back to back of interviews on my summit. Yeah. I do batch recording, putting them together. I announced at the beginning what I'm going to be doing my interview so they can select those. No. And then I talked to them about how the Ever Summit feature works and we'll be using that. And then our success, your success, our priority ways for them to reach out to us and then more information about being a sponsor. Okay. So that's just a speaker invite page you might be like, man, that's crazy Mark. It's so overwhelming. Like again, after you do it, once you can just clone this, reuse, it you've changed the information on there, make it relevant or just at least have one section.

Dr. Mark: Just one section. You can even, you can build this in the Virtual Summits Software with one of the custom pages, just have the title, what it is a video in a way for them to click a link and start to sign up process. Okay. Now I also have more information here. I have sponsor details because I want to start letting people know, Hey, I'm looking for sponsors. So that goes over. We can talk about that on another episode, but then I have more speaker details. Now this is primarily for people who've been approved to be a speaker because that hasn't happened yet. We haven't, they have to be approved. But um, this lets them know every little aspect. And maybe I'll share this on another, um, another episode, but it goes through every piece of our summit process, catching them up, like, so they understand everything from how to pre prepare for their interviews, to the promotion, to the benefits, to how we're going to prep them, all that aspect.

Dr. Mark: So that's there. I do that because I've recorded this once and now for every summit we get, we know these questions we get from our speakers. Now we have this place where we can direct them to, to get all the information they need. Okay. So again, this is just the start of the speaker onboarding process. Now first impressions, right? What you just heard me say and show here. This is an epic speaker invite page. There's been a lot of thought put into this. Now, granted, I've been doing this for seven years and you know, we put a lot of time and attention into this, but Hey, if you do it once you have it

ongoing forever. And even if you're not going to do all of it, you can at least have just one thing with one hat or with a video and a button for them to click or your one pager.

Dr. Mark: Now our process, our onboarding process, when they click this link right here to be a speaker on Summit Talks, this is actually, now how we do it is because we get so many speakers that apply to be on our summit. I think we had over 150 speakers apply to be on Summit Talks when we shut down that application because we had more and more people. I think when we shut it down, we were on track to probably have over 180 people just applying. Those weren't the ones all accepted, but it all starts here with this onboarding process. So I use Typeform, but you can use any kind of survey aspect. Some people like, for example, if you know, you're not going to have this big process, you want to keep it simple. You could actually just go from there straight to a Calendly or a calendar scheduler, just to schedule them straight for the interview.

Dr. Mark: Um, so if you're like, I'm only going to be showing this to people who I'm inviting and people aren't just going to randomly find the page. Then you can just have that go straight to your calendar. You may not need an application form. Now we get a lot of people coming onto our summits. So we actually have to do a speaker application form, which means you're applying. You're not chosen yet. You're applying to be on our summit and then we're going to select the people. Like I said, we had over 150, probably close to 180 speakers apply. We can't take all of them for our summits obviously.

Dr. Mark: Now what's cool about this is we collect all their information so we can offer other opportunities like the next summit we have, we can reach back out to them or I can have him be a guest on my podcast where I can say, Hey, even though we couldn't get you as a speaker on this, would you like to support it? And so we can create affiliates, but this is a step by step, signs them up gets their information, email address, what type of session will they be performing? So if you have different types of speakers, you want to collect that information. We had summit hosts, summit coaches and tactical sessions. And each of those, I needed different information. So we use this so that if they clicked on the summit host, it actually took them to a specific, uh, questionnaire that was specific just for summit hosts.

Dr. Mark: If they picked a coaches, summit coaches section, it had questions specifically for summer coaches. It was different than the summit hosts. And then of course the tactical experts were, was different than the host and the coaches. Now then we asked them, Hey, what level are you participating at? Standard featured prestige partner. And then I made them confirm, awesome. You've chosen a prestige. Do you know that this requires four emails, et cetera, et cetera. And they had to confirm that they knew that. So they have confirmed that they know what they're doing on this. And then we say, Hey, do you know anybody else will be a good speaker? So this is the first step right here. Do you know anyone else who would be a good speaker for this summit? We had at least 50% of our speakers recommend another speaker. And at least 10% of them recommended three or more speakers like four or five speakers.

Dr. Mark: So we went from, I reached out to, I believe 80 speakers to we had 180 come on and apply because each of those speakers, half of them actually recommended others. And then 10% of them actually recommended three or four or more. So we ended up getting

this, Oh, like just this onset of speakers applying because we asked, we just asked, do you know somebody? And then they would give us their email and we'd reach out to them or we'd have them put us in contact. And then the next aspect is, are you interested in being a sponsor? We had 25% of our speakers say, yes, I'm interested in being a sponsor. Please send me more information. So that's before I've even done any sponsor outreach, or even try and reach out to the sponsors I want. We've had speakers raise their hand and say, I'd be interested in giving you money to be a sponsor.

Dr. Mark: Send me more information. So those two main aspects, right there are huge, just recreating this kind of momentum to get more speakers and even get some sponsors. And then we confirm, did you mark your calendar and do you have an assistant? So we work with a lot of high profile, um, entrepreneurs, and we know they don't, they don't want to get, we have a lot of back and forth about to happen. I don't want to be onboarding their emails. So I want to take their best interest and keep that in mind. So I say, Hey, do you have an assistant or somebody that you would like us to contact for updates and notifications. They give us that email address. That's the person we communicate with. And then we thank them. And then the next aspect here is now I give them a link to schedule their interview.

Dr. Mark: So at this point we will go through and we will select, I want to make this process seamlessly. They can select their interview. We go through and approve. And then if it's approved, we keep the interview there. If it's not approved, we will remove the interview. So as this, we're doing this almost in real time, too, as applications comes in my teams, you know, they go through that within a matter of hours and we've either approved or not approved. Okay? So that's the application process from there. They then schedule their interview and both inside their interview, what goes inside of their calendar? Let me see if I can pull that up real quick inside of their calendar. You can see here for those able to see my calendar. Um, you can see my batch recording. It's uh, it's pretty crazy. So we have, you know, 10 hours of interviews, um, each day, almost here, but inside here it says, Hey, here's how you can join.

Dr. Mark: Don't forget. These are what we're going to be talking to you about. Also remember if you have not filled out the, uh, the, um, summit speaker information form, please be sure to do that. So we have that inside of there as well as a follow up, um, notification as well as we follow up with them as well. So now that they've got their interview, we need them to actually fill out their speaker details. So they've been approved. The first thing was an application. Second thing is their speaker information. And so I like to make mine, you know, nobody loves filling these things out. If we're going to be honest, this sucks, right? None of us like doing it. So I try and just acknowledge that and recommend, I say, look super duper important information. I try and make it a little light hearted and a little fun.

Dr. Mark: It's like super duper important information. This is about making you look like the superstar in the summit. So I let them know it's not for me. This is for you. We're doing this. I say, we get it. No one loves this part, but we want to make sure you look incredible on the summit. So we need this information to do that. Please complete this as soon as possible, it will take approximately 10 to 15 minutes. So I let them know so they can set that amount of timeout. Okay. But this is the information I need to prepare

for their interview. And just like I always teach, I actually prep for every single one of the interviews that I'm doing a day. It doesn't take me long because of this process that I've created, but it still takes me 10, 15 years and it's to prep and get ready for interviews and make sure I'm creating a spectacular interview, um, for my summit.

Dr. Mark: And so I need this information and if they're not willing to fill this information out, they're probably not going to do the rest of it. So we just remove them and move somebody else. So here's where we get their speaker information. So how do you want your name on your speaker page again? What type of session are you? And because that then lets them, the reason we ask that here is we already have the information, but this is because I have different information I need from them based on what type of session they're going to be doing. So one aspect here is our summit hosts' sessions. We did those interviews, the coach and tactical sessions we did as hybrid. Those were presentation-based. So we had a mixture. So it's not just a bunch of boring interviews. And even with our interviews, we made sure that those are not just, just, those are not the 10 questions standard interviews.

Dr. Mark: Each one of these interviews were unique. I prepped for it and I took them in a specific where unique direction. So every single interview was different. Every single interview had a new and important information. And inside of those, we did what we call our summit show and tell. So I made them actually share their screen and show something just to break it up. Just so it didn't seem like just a bunch of interviews. So it actually changed that up. So that was one aspect there, but here for hosts, we need like what's the sexy hook. So I always prepare what we call perfect intro. So that's the welcome flow and the perfect intro for every one of our interviews so that it starts off, um, impactful and professional and not like a boring, like, Oh, Hey, I'm so excited for this session. I can't wait to tell you about no, we go boom, straight into a hook.

Dr. Mark: Pre-qualified credibility intro. That's the, the speaker and then into who they are, et cetera. So that whole process, which we have free resources, free trainings on that inside of our resources area, over <https://virtualsummits.com>. <https://virtualsummits.com>. You go to the resources you can get, I think it's called Interview Like a Pro it's a free training series. And we talk exactly how to do this. I collect the information I need from the speakers, which makes it easier for me, but now I can craft amazing, perfect intro. So what's a hook benefit from your, your session important fact, one important fact about your session? Now talking about your business specifically, what's your position? What's the name of your company? What makes you an expert? What's one notable or extraordinary award honor accomplishment. And then I have some specific questions about their summit so it helps me prepare. Did you have any live streams?

Dr. Mark: Will this be a, we're going to be featuring persons of color? Would you like to be featured? If you're a person of color, would you like to be featured? And then I have my speaker agreement in here. They actually have to sign and agree. There's no skipping it. They have to agree to the speaker agreement. Now some of this is advanced. I'm giving you like probably the most advanced version of all of this. And I did not do this on my first summit. So please don't get overwhelmed. Don't get that analysis paralysis, just do what you can. I'm showing you probably the most extreme or elite version of this, just

so you know what's possible. And then you can create something that fits you and your needs there. But I have the speaker agreement right there inside of the form that they fill out so that it's been agreed to. They know they've done it. I know they've done it. We're all on the same page there.

Dr. Mark: And the main reason I have that agreement really is just so I can use the content the way I need to. I can repurpose it. I can use their image and their name, et cetera. And that they've agreed to the aspects that they're going to do. So if their partner, it's kind of a generic thing that says, if you've agreed to this, you're going to have to do the minimum that otherwise you don't get the benefits. So they've, they've signed that then of course there's some mutual indemnification and some independent contract saying, we're not partners, et cetera. And then that's pretty much it. We add after that, it goes now into the aspects of, for their summit, the additional things. So the bonuses, for example, let's get down here. So, um, this is the information that's going to go into their summit. This is so I have it all together for my teams.

Dr. Mark: They can build everything out. We're not hunting down speakers trying to get this. So what's your expert title. Give us a short bio, include your headshot, linked to your website. Any social media links you want to include. Then again, I try and make this fun, like getting closer here, you know, now the goodies to help you grow your list. So I say, look, this is for you to grow your list. What's the name of your free gift? What's the description of your free gift upload an image of your free gift. And then the link then almost done just a few more, few more items says, and this is actually the fun stuff. So you know your shipping address, what's your phone number so we can send you some cool stuff. Great. You're done. And here's the other way they put this in here. This is a part of the onboarding sequence.

Dr. Mark: Do you have a Facebook group? Do you have a podcast? If they say yes, what am I doing on scheduling to be on their Facebook group? Or I'm requesting to be on their podcast to go out, to promote the summit before the summit goes live. Now it like 75% of them have a Facebook group. So I now at the end here, actually the last thing, um, at the bottom here is, um, scheduling their interview and I have a link to pre-book me for a Facebook live or any live sessions into their audience. So they can even pre-book me during, in my it's blocked, the calendar is blocked off just during the promotional period of the summit so they can even book me right now all back to back to back to back in the sense of speaker invite page, speaker application, scheduled their interview, fill out their speaker interview, speaker details, and then book their promotional period of Facebook live or whatnot with me during the promotional period.

Dr. Mark: So all of that just goes, that's the onboarding, that's the speaker onboarding process, which makes this simple, easy, quick and fluid so that they have access. Like, so this is just all happens and everybody's on the same page. Of course my team's following up with them the whole time. So again, last thing, we please tell us when you intend to send out your emails. So this is letting you know, getting them to commit or confirm when they're planning on starting to send out emails. And then, um, again, uh, this is the details right here. I just, I talked about that early. Like here's more information you can go look, if you have questions, et cetera, to prepare for your interview in that is the speaker onboarding process. And then of course, we dive into a couple other things, like



as far as, uh, my team then takes over and we have some very specific follow up emails to prep them, to make sure things are ready, surprise and delight them, et cetera.

Dr. Mark: But as far as the onboarding from outreach to then interview and collecting their information, that is our speaker onboarding process. And having that information all there together is how I was able to reach out to 80 speakers and getting over 180 apply. And having more than 40 speakers raise their hands for interest and being sponsors. First impressions matter when you reach out to speaker, that is a first impression. So at least have a one pager designed and ready, or even just at one headlining on a, on a website. Again, you can do that. Even inside the Virtual Summits Software, you have, you know, you can use a custom page and build it yourself, um, but have that, and then use things that make it quick and easy for your speakers. So again, I know that's a lot, I threw a lot, um, especially for everybody listening into the podcast right now.

Dr. Mark: Um, if you check out our YouTube channel Virtual Summit Podcast on the YouTube channel, um, we will be releasing the video version of that. And I'll actually, you can see a walkthrough of that and I'll throw some screen captures, even in the show notes, um, for you listening to the podcast. So you can get that in the show notes over at <https://podcast.virtualsummits.com/170>. I'll put some screen captures of this, so you can just get an idea of it as well. So that's my speaker onboarding process. That's how we were able to send out 80 requests and have over 180 speakers apply and have 40 people ask us to be a sponsor. Again, you can do this too. Remember your message matters. And one of the most powerful ways to get that message out to the world is with a virtual summit. So go out there and make an impact, and I'll see you on the next episode.

Dr. Mark: Now, I want to end this episode by saying to all the summit hosts listening right now, I believe in you, and you can do this summits are by far one of the most powerful ways to quickly grow your list, launch your platform, make more money. And most importantly, make an impact in the world, even if you're just getting started. So don't get caught up in analysis paralysis because the world needs to hear your message. And there are people who are waiting for you to help them just get started because imperfect action is always better than no action. Thank you and see you on the next episode.