

## **Episode 173: How to transition out of your job using a virtual summit**

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Dr. Mark T. Wade: Hey there, summit hosts. Are you looking want to look at some lessons learned by running a travel summit during COVID-19, how it got shut down and how you can overcome those challenges too. Also, you can learn a lot about your potential customers by interviewing established experts in your field through a summit, especially if you're a newbie. Now, if you're just getting started, but have big dreams, then this episode's for you. Hey, there summit hosts, I'm Dr. Mark T. Wade, founder of Virtual Summits Software, CEO of Viral Summits, and your host here on Virtual Summit Podcast. Now this episode, we are in store for an epic little lesson. So grab your pen, grab your paper because we got legendary Jerry Winans with us, who is the owner of Affordable Tailored Travel. Jerry, thank you so much for being here with us today.

Jerry Winans: You're welcome.

Dr. Mark: Now, we're going to have some fun. We're going to jump into lessons learned and some insights from a very unique situation and summit. But before we do that, Jerry, I'd love for you to tell our listeners just a little bit more about yourself.

Jerry: Okay. Well, I am a retired Air Force officer. That was a different part of my career. I retired in 1995 and from that period until January of 2020, I worked as a human resources manager and also a training manager in industries, including healthcare manufacturing, and then higher education.

Dr. Mark: Well, that's some history. Thank you very much for your service, Jerry. I appreciate that. Now let's talk about some of the summits. So first off let's get an overview of what the summit was. Can you tell us a little bit about it, why you decided to host it and then we'll jump into some of the specifics.

Jerry: Okay. The title of the, of the summit was How to Travel like a Pro. And it was really designed to give information to people who at whatever level of travel experience, they had a beginner, more experienced, or even, um, you know, very well traveled people. I was able to interview, uh, 26 travel experts. And these were a good cross section of from, well, for example, four categories: videographers, like YouTube, making YouTube videos, uh, people who do podcasts, people who write articles and then also people who are more experienced and they're, they just have blogs. So there was a real cross section of different methods of talking about travel. We also had travelers, uh, the experts were from the US, Canada, Mexico, and overseas. I had one in Europe, uh, one in the UK. So we had a really good cross section of people who were, uh, well traveled around the world.

Dr. Mark: That's, I love this, this blend, videos, bloggers, and then the other aspects as well. When you, like, how did that actually end up? Cause this is, to me, sounds like a perfect combination. Also. It sounds like a perfect way to reach your target, avatar your target

audience. So how did that end up with that mixture? What was the feedback both from some of the speakers as well as the audience?

Jerry: Well, there were two ways I researched my expert speakers. Uh, there are several websites that list, uh, people who do blogs and some other, uh, some on, on videographers, but they basically rank them by the, by the audience size that they have also what's their expert rating. So I found several of those sites and I went through and made a list of my ideal speakers. Some of them I didn't get, I didn't get Rick Steves. I asked, but he was tied up, but there were others that also had a really good following, a pretty good email list. And then the second way I did it was I went out to some Facebook groups for travelers and I mentioned the Rick Steves. I went to the Rick Steves travel group for Europe. And I ask in each of those forums, who do you listen to? Who are your favorite bloggers? Who are your favorite people on YouTube? Uh, how about, uh, people who, uh, you just follow in general, you know, through their travel advice. And that's one of the reasons, one of the ways I got a really good mix because, uh, you know, different people like their, their information, some want to read it, some want to see videos, only others are interested in podcasts. So, um, and, and it was just interesting because I was really asking the target audience, who do they listen to?

Dr. Mark: That is a ninja little trick right there, Jerry. So I hope everybody wrote that down. Why not ask your target audience who some of their favorite people are. And then that's another way to actually find out other speakers that could be on your summit and even a step above that is it's foreshadowing and you could have them tag their favorite people in the post, in the comment which starts to gain attention to your, to your summit. So I love this, uh, insights here. Now, when you, how do you, let's go back to the moment when you actually decided to do this? Cause you said you were, uh, in a, in a career in January and then you were going to be launching this summit a few months after that kind of take us through that situation and what happened.

Jerry: Okay. Well, my intention when I started this summit was to transition from my former life as a human resources manager, into being a travel advisor and to be frank, I really hadn't figured out exactly what I wanted to do in the travel world. I thought, well, maybe I'll want to be a blogger. Maybe I want to be a podcaster, but it became more and more obvious as I interviewed the experts that really, what I wanted to do was to be a travel advisor, a travel, they used to call them travel agents. Uh, but there's so much more now they're they, they don't just book tickets. They really are a counselor if you will. And one of my backgrounds is a psychology counselor, uh, have a master's in Counseling Psychology and I've always liked helping people. So as I thought more and more about the travel world, I thought, well, it's an ideal situation.

Jerry: I want to go think, take things off my bucket list. And there are other people out there who are travelers, who are working on their bucket list. So why don't we join forces and my clients, I can help them find their ideal destinations. And for that matter, I want to form some groups to where I go to some places that are on my bucket list. So that's what the summit for me was about, was kind of a pivot go from the human resources world. I'd worked at a university and I'd been there about 10 years and I was ready for a really big change. And I kept thinking, I want to, I want to travel. So the summit for me was information gathering. Cause I learned a lot about the world of travel from these

experts and whether they were, you know, people who make videos or podcasts or write articles, they were well-traveled. I mean, several of them had been to 40, 50 countries. Uh, some of them traveled full time and one couple in particular I can think of, they traveled just as I did for years when I had vacation, but they made the most of their vacation. So it really was teaching me a lot about what are the ins and outs of traveling either on your own or working with someone and how can I, how can I help people in the future find their ideal destinations?

Dr. Mark: I love this. This is so good. Many of our listeners right now are probably in similar situations where they're still working at a job that they're looking to either transition out of, or they got this big idea that they really want to bring to the world. And they're like, how do I get started? And of course, one of the things we believe is there's no better way to get that message out to the world than with a virtual summit, but you brought up a whole other aspect of this, which is so good, which is not just getting a business started, not just building an audience and generating some revenue, but also how to learn, how to bring your knowledge up to expert level in a very quick amount of time so that you can capitalize on this. Now I want to dig into that actually a little bit, Jerry. So, you know, other than just listening to them kind of teach or talk on your sessions, did you choose sessions based on the things you wanted to learn and how did you kind of keep track of all that information? Did like, did you do anything special to make sure that you were, you're not just going to lose this amazing information that you were learning.

Jerry: Well, I, I really I'm a big believer in letting people kind of define their own niche. So each of the people I interviewed came with one or more areas that they already were focused on. Um, like for example, one of the persons I mentioned is an expert on Mexico. Another was a couple who do travels all across Canada. So some of the experts really just lent themselves to that particular niche. One woman I interviewed as a really well, well viewed podcast series on YouTube and it's all about cruises. So I kind of let each other presenters more or less defined their own topic. I did send each of the presenters a list of about 10 questions and of the 10, I would say there were probably three that I asked every presenter. Uh, one question was, uh, what are some lessons you've learned the hard way as a traveler?

Jerry: You know, don't do this. And so they could share some funny story about something they did when they were a newbie or, or maybe even just last week. A second one I always ask was, uh, everyone travels with their phone. So what's something that you put on your phone as an app that you really recommend other people. And then the third thing was, um, whenever you pack what's one or two things you wouldn't leave home without. And I got some very interesting answers. Um, then the other questions I pulled from their website, and for those of you who were able to see this, um, on the video version, I have two monitors behind me. Those were always up when I, when I did the interview. On one monitor, I put the person's website. So people who are watching the interview could see what the website looked like when they go to look for it, say, Oh yeah, that's the same one that was on Jerry's interview.

Jerry: And on the other side, I would put any kind of an offer they were making, it was an e-book or something else they were offering. I put that on the other side. But what I did

when I went through their website, uh, when I was doing my research, I always tried to pick out some very specialized questions that looked like, Oh, wow, I bet they've gotten a lot of hits on this article. I'll ask them about that. Or I would find something in there. Okay. Here's an example. Uh, one woman did a podcast series called experiences. You should have, and it was all about, you know, really cool things like diving into a shark tank. You know, you're protected from the sharks, but they're right there, like a foot away. But she had this article on her, on her podcast list as kind of a supplement article that talked about sustain adventurous for people who are, who are handicapped. And so I thought, wow, that's a really interesting aspect of travel people who are, you know, have a disability or you a wheelchair. They still want to get out there and have adventures. And so she had a whole series of, here are some adventures you should have if you're, you know, in the handicapped or disabled world. So those were, that's how I formed my questions had to ask about three standard questions sprinkled throughout the interview. And then the rest I had tailored to their particular specialty.

Dr. Mark: I love that. That is so cool about that, like how do you still have experiences with, with a disability that is awesome. And then I love how that you took the information. There was a couple of key concepts that everybody could provide insight because of their expertise in their experiences, but yet you crafted the interview around that person as well. I think that is a really excellent way of doing it. So let's kind of go to some of the challenges like we know every summit, no matter even myself, I've been running summits for seven years and I've yet to have a summit that went without some type of challenge. So take us into your challenges. What did you experience that maybe these other summit hosts may experience so that we can help prepare them?

Jerry: Okay, well, this is a three day summit. It was April 6th, 7th and 8th. Uh, the very first challenge would be, um, the timing, as I mentioned, I left my regular day job in January and I really had a 90 day plan to set up a summit in early April. So that meant getting the people all interviewed and so forth. Well, if you remember January, no COVID. Towards the end of January, starting to have a little bit of inkling that something was happening. And then February, March was when the world changed. And then the decision was, do I go ahead with this? You know, are people really going to be interested in travel? One of my, one of my presenters emailed me privately. He didn't make a big public issue out of it, but he said, you know, are we being kind of, kind of tone deaf?

Jerry: If we put this thing on, uh, I asked him, I gave him the chance to say, if you want to withdraw, that's fine. I understand. He went ahead and he let me interview him. And we, we posted his interview, but that was, we had to be sensitive. So I did, I had a few comments as the intro, kind of redid some of the intros and said, now understanding we're in the COVID virus, it's gonna, this is going to be information. You have to take with a bit of a grain of salt, but when we're ready to travel again. So that was the first challenge. Second challenge was when we actually went live. Obviously these were all interviews that were recorded, but they were going to go live. If you will, the morning of the sixth, uh, 6th of April and everything went fine up until noon and then Vimeo crashed.

Jerry: And it wasn't, it wasn't just my part of it. It was the old system went down and it was down for about two hours. So I had people that, and, you know, some were paid cause

we did have a package where you could buy it and watch the videos at any time later, instead of just the day of the summit. And some of those contacted me as well as just some of the ones with the free ticket. Um, they, you know, my, my inbox blew up with all these messages that said, you know, where's the words next podcast where where's the next video. So I emailed everybody and said, Vimeo is down, please be patient don't bail out. And I, I, uh, anyway, so it was a little disturbing to have your videos just disappear. Uh, so lesson learned for the future. I probably would have loaded them both on YouTube as well as Vimeo. Um, but again, lesson learned.

Dr. Mark: Yeah, that is a really good, um, little lesson right there. Usually when I do our virtual events like live streamed conferences or our livestream workshops, or if I'm ever helping anybody with those, I always say redundancy, redundancy, redundancy have double everything, two computers, two mikes, two backups of everything. And in this case, like you just said best to have two websites to, you know, like all of those aspects and we'll jump into the website aspect of it in a minute. But one of the things I want to point out here, which I think is really great and even an opportunity, you know, one, the fortitude to move forward with a travel summit in the midst of COVID. I think that says a lot of defining characters, probably some of that military in you that that says, you know what the, we will March forward here, we'll make this happen.

Dr. Mark: And you know what, here's the thing for anybody that's in an experience, you know, even like that, we're like, Oh, well, you know, the timing's not great. Or, you know, I've had somebody recently that didn't realize that they had actually set their promo period over 4th of July, which is not the best time in the world to be promoting something. Um, just because everybody else is promoting something. So the good news is it's never the end. You always have the option to relaunch. You can always do a relaunch in. Sometimes we've seen relaunches do just as well as the initial launch on some summits. So don't get too upset with yourself if you're ever in one of those scenarios. The other aspect here for you, Jerry, I think great opportunity is you now have this resource, which is still valuable. It's still sellable even in the future, once travel gets back to normal, but now you have this ability.

Dr. Mark: You can take this, you could even do a one day summit on traveling post COVID or what does the future of traveling look like? You could have these one day summits all about the topics of travel, because here's the honest truth, you know, pre COVID me and my partner. We probably traveled three weeks out of, out of every month. And although I've enjoyed the kind of calm and the peace, we talk about travel all the time. So there's still probably a lot of enthusiasts that would like to even feel like they're traveling, even if they can't travel. So I think you have a lot of opportunity here of doing like kind of subsets of this during this process, actually keeping it one day summits. So you can do them quicker. You know, it's not taking three or four months. You can get them done relatively soon in on these specific topics, we kind of call them like breaking news style summits, but I think they'll be, um, they could be very valuable for you moving forward and anybody else, you know, in this kind of same scenario, no matter what your niche or industry is, everybody was impacted by COVID and it's going to last for a while.

Dr. Mark: So no matter what, you're going to find a way to kind of craft the scenario you're in and how can you still deliver your expertise? And now encompass this situation you're in so

great insights here, Jerry. Um, let's keep going on with the challenges. Maybe we're talking some about the tech components or other aspects that you experienced.

Jerry: Okay. Uh, one thing to the positive, I already owned Camtasia and I had used it to a small degree, but I got a lot better because I learned how to do cross fades and, uh, kind of relearn some things I knew years before, but I really advise people if they're going to do a virtual summit with video, uh, go ahead and invest, invest in a good software to do editing. Uh, because even though most of the interviews I did were pretty much one take, there were a couple of times a person I can remember one woman from Australia. Uh, her cat jumped right up onto her laptop, right in the middle of the interview. So we stopped everything and she got the cat away. And then we had started over, well, I tried to match the shots as best as I could, but I still had to find a bridge across that.

Jerry: So I kinda went to black very briefly and it came back up. So just some video, video, editing skills, get those up to date. Um, another thing I would advise is look very carefully at whether you use an all in one solution like, um, which I did ClickFunnels. I wouldn't do it again. That way it's a fairly expensive and you're kind of held captive because once they have, once you've built your, uh, your pages and so forth in the funnel within ClickFunnels, they own it. And so the best I could do at the end was to take some screenshots of it. So if I wanted to replicate it in word, uh, you know, WordPress or another software, uh, so just think about whether you want to have an all in one solution, or if you want something that's a little bit more flexible. You may have to put them few more moving pieces together to make it work.

Jerry: But that's one thing I would probably look at again. And I do like your idea about having just a one day summit, almost kinda like a, you know, here's a couple of brief clips from what we did before and now let's do a quick update. And what did you learn from COVID and what would you advise travelers now to do differently than your advice back before all this happened? Uh, in terms of just a video set up, um, as you can see, I use the same set here. Uh, this was a nice mural that came from Amazon and I'll tell it just a little funny. It was funny to me, at least when I was looking at a backdrop, uh, I almost bought one that had a, it was kind of like a watercolor of the world and it was a very, very colorful, I really liked it except as I got looking at it closer just before I ordered it, I realized that they, someone was kind of artistic when they did this, a picture of the world and they put like a Rose right over China.

Jerry: And then I realized that looks a lot like a pandemic red zone. So I didn't order that one. I went with something more earth tone colors. Um, and again, now I'd probably would do possibly a virtual background. I do have green-screen at this point. So that's another thing to consider. Um, I didn't have too much problems scheduling people. I mean, obviously we had to work together to get our scheduling, but, um, I used Zoom for all of the interviews worked great. Um, I think it was very one thing. I would probably prep my, some of my presenters on a little more was on microphone. Um, I have a mic and a good kind of a sound feed. I hope it's coming across pretty well. Gave me good sound quality. I had a couple of presenters who tried to do it entirely from laptop and wow. Laptop quality, audio quality can really suck.

Jerry: Now they were doing it from an echo chamber. Like they were in a room with all solid walls, no fabric around. Anyway, I'm just kind of an, I hear things when I'm listening to a podcast or when I'm watching a video, if the audio stinks, they lose me. So there was one interview. I almost wish we could have redone, but it was too late. It was too close to the actual air date. So I just went with it. But what I would probably do is prep them a little bit more. I didn't want to insult people and say, you need to do this. You need to do this. But I realized, especially like one of the writers, um, he wasn't used to doing either podcasts or video interviews. So it would probably have been just helpful for him to get a little coaching, to know how to set up his, his side of the picture.

Dr. Mark: It's very true right there. And, and I would say, you know, for, for all of our, summit hosts listening to this is it's, it's your responsibility to think about your audience at the end of the day? I know a lot of us are, you know, sometimes interviewing like mentors or people we look up to. But at the end of the day, it's about the audience and Jerry, you said it perfectly there. Um, as much as we, the video is what really matters. It's the audio, people will deal with a video that's hazy or fuzzy or blips in and out, but they will not deal with audio that they can't hear or that's not, not great. So that's an amazing insight that you just passed on to our summit hosts. Now, as we start to wrap this episode up here, I'd love for you to give our summit hosts. Like just like what was the biggest positive impact or return on investment that you received from hosting this summit?

Jerry: Okay. Well, by the end of the doing interviews, I realized, um, I really wanted to go ahead and go into a travel franchise. So I did join Cruise Planners and our website is a [affordabletailoredtravel](https://affordabletailoredtravel-cruiseplanners.com), all one word, <https://affordabletailoredtravel-cruiseplanners.com>. Uh, I also have a shorter URL, <https://Winanstravel.com> and it's more of a landing page, but what I really use this for was kind of a transition, a pivot over into the travel business. And my goal with doing this was to start an email list. Uh, one of the crucial things of any business is to have your own email list that you can market to. You know, you don't want to overkill, you don't want to spam people, but I was able to add about 300 people to a small list I already had started. Uh, so I have about 400 total now of people who I can market to, uh, obviously people aren't ready to jump on the next cruise ship.

Jerry: Cause first of all, all the cruise ships are pretty much canceled through the end of the year. There's a few still running November, December, but for the most part, people are doing domestic US travel, uh, through the agency I'm working through, we have relationships with all the major travel vendors and not just cruises. I mean it's land packages, it's, uh, railroads, it's sandal resorts, you know, it's everything travel. So at least now I can start informing people, Hey, if you're going stir crazy, like you mentioned, uh, you know, I kind of want to get out there. I'm having cabin fever. Uh, here are some options. Uh, I've been posting a bit more on, a lot more, on Facebook trying to find where my niche is there. And the, the one I've gotten the most traction from is, um, I found a free use photo and it said it was kinda like an amusement park.

Jerry: It said Sillyville at the top of it, it was kinda like an entrance to this park. Sillyville as, so I combined that with a Canva, by the way, is a very good way to create your own graphics. So, uh, I used Canva to put that at the top of the picture and that the bottom

was like a square of four different travel options. And then the caption was, are you tired of living in Sillyville? Do you want to escape? Here are some options, you know, contact me. We can find you a place to go from Sillyville, something like that. Uh, so that's, that was the first thing I got from, as a benefit, as an ROI was a good hot list, warm list of people interested in travel. Of course not all these people are wanting to do travel advisor type travel.

Jerry: A lot of them are wanting to do backpacking. That's fine someday. They may want to do other kind of travel. So that was the first, that was the first ROI. Um, second was just kind of the intellectual capital, uh, you know, getting more information about the travel world. So if anyone's out there wanting to do a summit and it's going to be sort of a transition for them, perfect way to contact experts who are, you know, and have a legitimate reason to, as they say, pick their brain, ask their advice, but in the guys, you know, in the, in the forum of a summit and other people can benefit from it too.

Dr. Mark: So good. That is such good return on investments. There are Jerry, this has been absolutely phenomenal. Um, before we go, though, everybody's going, Mark, how can I get more Jerry in my life? Where's he hanging out at? So why don't you quickly let everyone know the best way to reach out to you and where you're hanging out at?

Jerry: Okay. Uh, if you want to email me, it's very easy. It's Jerry.Winans. W-I-N-A-N-S @cruiseplanners, all one word, cruiseplanners.com. The website, the short version is WinansTravel. All one word. Winans, W-I-N-A-N-S, travel.com. And that's the landing page I have up behind me. And then the other website that's more complete that's the longer URL, probably eventually shorten that, is the one over here, which has all of the travel deals. And it's affordabletailoredtravel, all one word, <https://affordabletailoredtravel-cruiseplanners.com>. And then you can search that to your heart's content. And it's a very web, uh, very user friendly, uh, website. And there's lots of good deals out there right now. Seriously, 2021 and 2022 is just going to explode with travel.

Dr. Mark: Absolutely. And we'll have all these links over in the show notes, so you can check those out there as well. Jerry, this has been incredible. Thank you so much for sharing your time, energy and wisdom with us today.

Jerry: Well, thanks for having me as a guest.

Dr. Mark: And thank you all you summit hosts for hanging out with Jerry and I. I'm Dr. Mark T. Wade, your host on the Virtual Summit Podcast. Remember your message matters. One of the most powerful ways to get that message out to the world is with a virtual summit. Now don't forget to check out all the show notes over at <https://podcast.virtualsummits.com/173>. 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. 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.