



BOLDLY | GO

Storytelling

How to Connect with Prospects and Clients

Debra Kilsheimer



- I play the violin at weddings.
- My Dad taught me how to do tax returns instead of playing taking me outside to play ball.
- My favorite activity is riding the waves in the Atlantic Ocean
- I drove a Pink Cadillac as a Mary Sales Director
- I have a Podcast!
Please listen & Subscribe.



Learning Objectives

1. Learn and apply techniques to transform accounting data into engaging stories for effective client communication.
2. Evaluate the influence of storytelling on business decision-making, distinguishing it from traditional data-driven methods.
3. Construct personalized business narratives that effectively communicate your unique professional value, enhancing client relationships and competitive standing.



BOLDLY | GO



#SNH24

Agenda

AGENDA

- Why do Storytelling
- What are the Elements of a Story
- How to Create a Story
- Let's do YOUR Story



This Photo by Unknown Author is
licensed under CC BY-NC-ND

BOLDLY | GO



#SNH24

WHY?

Why tell Stories

- Engagement
- Retention
- Emotional Connection
- Clarity and Understanding
- Persuasion
- Contextualization
- Humanization
- Building Trust



BOLDLY | GO



#SNH24

ELEMENTS

BOLDLY | GO



#SNH24

Your Story

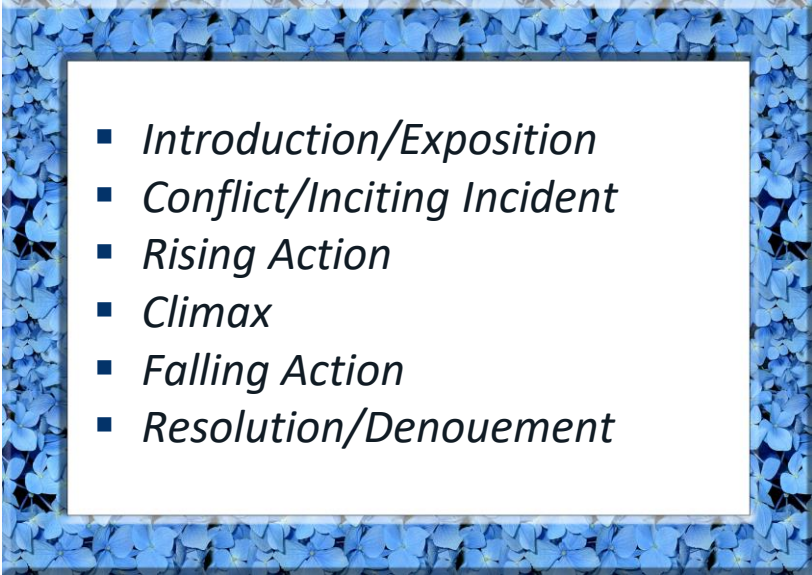
Your Story: Why do you need one?

- Networking Events
- New Prospect Call
- Public Speaking
- Personal Branding
- Career Development
- Mentorship and Coaching
- Price Increase Conversation



Let's Practice

- Create a Team of three
- Select the Situation
 - Networking Events
 - New Prospect Call
 - Public Speaking
 - Personal Branding
 - Career Development
 - Mentorship and Coaching
 - Price Increase Conversation
- Use document to create your story.
 - *Storytelling Outline.pdf*
- Share it with the group.

- 
- *Introduction/Exposition*
 - *Conflict/Inciting Incident*
 - *Rising Action*
 - *Climax*
 - *Falling Action*
 - *Resolution/Denouement*

BOLDLY | GO



#SNH24

Storytelling from a
Financial Statement?

Storytelling from a Financial Statement

- Introduction/Exposition
- Conflict/Inciting Incident
- Rising Action
- Climax
- Falling Action
- Resolution/Denouement



This Photo by Unknown Author is licensed under [CC BY-SA](#)

Let's Practice from a Financial Statement

- Introduction/Exposition:
 - What do you see?
- Conflict/Inciting Incident:
 - What looks wrong, weird, good, bad
- Rising Action:
 - What trends so you see?
- Climax:
 - What will happen?
- Falling Action:
 - What are the next steps?
- Resolution/Denouement:
 - Summarize. Present a forward-looking perspective.

SNH STORY FINANCIAL EXAMPLE.pdf



PRACTICE - PRACTICE- PRACTICE

- Your story gets better with “age”
- You’ll get better at it the more your do.
- You’ll be able to adapt to different situations
- You’ll be more interesting

*Be willing to do it wrong
to get it right.*



BOLDLY | GO



#SNH24

QUESTIONS?



BOLDLY | GO



#SNH24

THANK YOU!

Debra Kilsheimer

bsfsdeb@gmail.com

386-852-5755





BOLDLY | GO

Storytelling

How to Connect with Prospects and Clients