

Believe! Grow Your Practice Faster & More Profitably with Your Ideal Clients the Ted Lasso Way

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ADVISORFEST 2024

Agenda

TODAY | JULY 10TH

Future-Proof Your Practice: 7 Ways to Leverage AI in Your Advisory Practice

3:00 PM EST / 12:00 PM PST

Drew Cutting, *Digital Marketing Specialist, Symmetry Partners*

Cole Connelly, *Marketing, Symmetry Partners*



ADVISORFEST 2024

Agenda

SYMMETRY®

TOMORROW | JULY 11TH

Philanthropic Planning for Clients: Private Foundations

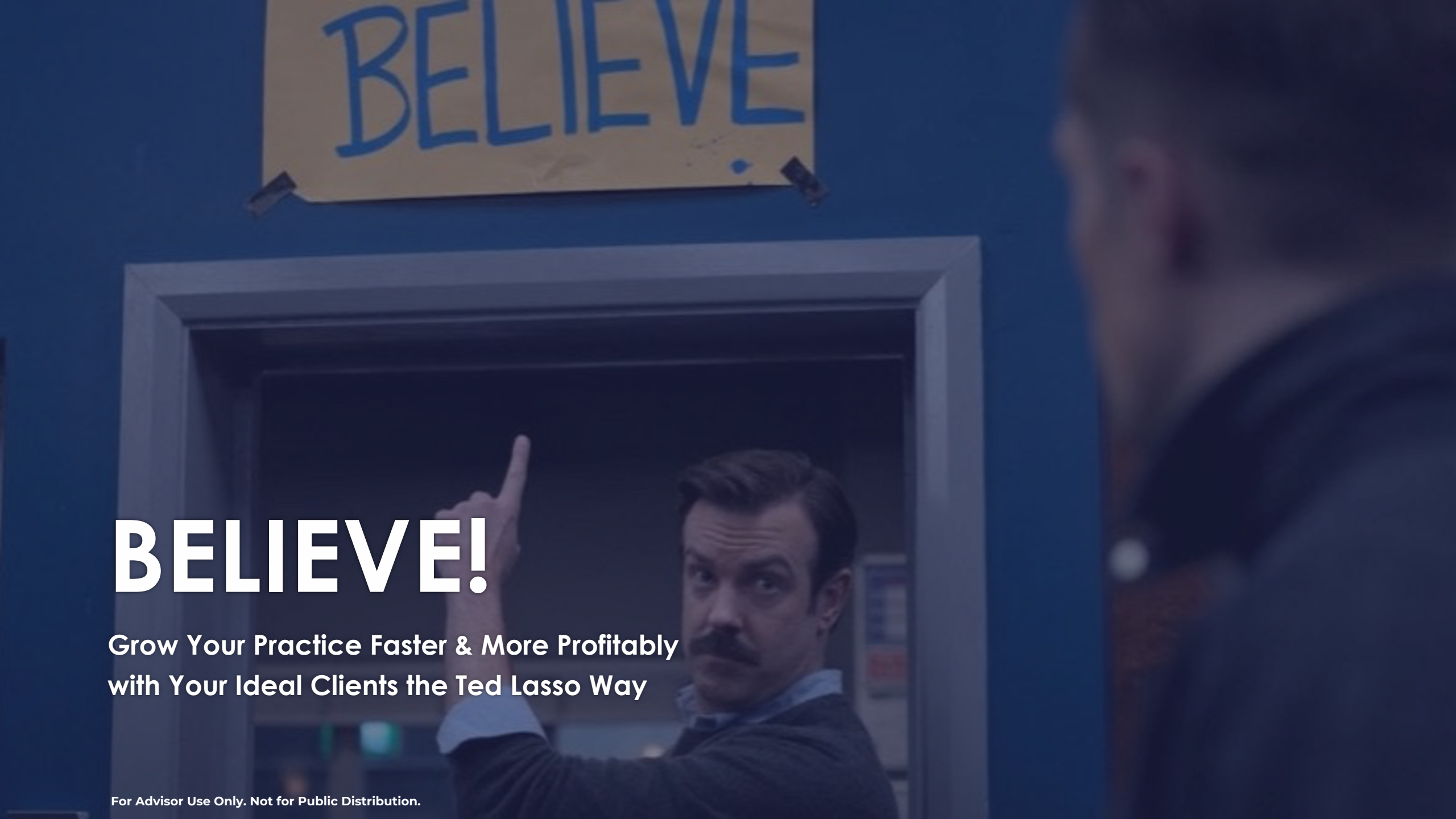
11:00 AM EST / 8:00 AM PST

Jessica Donahue, *Senior Managing Director, Foundation Source*

How Advisors Are Growing Their HNW Tax Alpha and Direct Indexing Business Today - Panel

3:00 PM EST / 12:00 PM PST

Nan Price, *Content Strategist, Symmetry Partners*



BELIEVE

BELIEVE!

Grow Your Practice Faster & More Profitably
with Your Ideal Clients the Ted Lasso Way

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"Taking on a challenge is a lot like riding a horse, isn't it? If you're comfortable while you're doing it, you're probably doing it wrong."



Who is Ted Lasso?

A widely acclaimed series starring Jason Sudeikis as Ted Lasso, an American football coach hired to manage a British soccer team — despite having no experience. But what he lacks in knowledge, he makes up for with optimism, underdog determination — and a compelling communication style.



Why Do We Care?

Awards

- Primetime Emmy Award for Outstanding Comedy Series 2022, 2021
- Primetime Emmy Award for Outstanding Supporting Actress in a Comedy Series 2021 · Hannah Waddingham
- Primetime Emmy Award for Outstanding Supporting Actor in a Comedy Series 2022, 2021 · Brett Goldstein
- Writers Guild of America Award for Best Comedy Series 2021 · Jason Sudeikis, Brett Goldstein, Brendan Hunt, ...
- Primetime Emmy Award for Outstanding Lead Actor in a Comedy Series 2022, 2021 · Jason Sudeikis
- Writers Guild of America Award for Best New Series 2021 · Jason Sudeikis, Brett Goldstein, Brendan Hunt, ...
- Screen Actors Guild Award for Outstanding Performance by an Ensemble in a Comedy Series 2022 · Hannah Waddingham, Jason Sudeikis, Juno Temple, ...
- Primetime Creative Arts Emmy Award for Outstanding Guest Actor in a Comedy Series 2024 · Sam Richardson
- Screen Actors Guild Award for Outstanding Performance by a Male Actor in a Comedy Series 2022, 2021 · Jason Sudeikis
- TCA Award for Program of the Year 2021
- Primetime Creative Arts Emmy Award for Outstanding Casting for a Comedy Series 2021 · Theo Park
- GLAAD Media Award for Outstanding Comedy Series 2024
- TCA Award for Outstanding New Program 2021
- AFI TV Programs of the Year 2022
- TCA Award for Outstanding Achievement in Comedy 2021
- Golden Globe Award for Best Actor – Television Series Musical or Comedy 2022, 2021 · Jason Sudeikis
- Critics' Choice Television Award for Best Supporting Actress in a Comedy Series 2022, 2021 · Hannah Waddingham
- Satellite Award for Best Actor in a Series, Comedy, or Musical 2022 · Jason Sudeikis
- Critics' Choice Television Award for Best Comedy Series 2022, 2021
- Critics' Choice Television Award for Best Supporting Actor in a Comedy Series 2022 · Brett Goldstein
- Eddie Awards for Best Edited Comedy Series for Non-Commercial Television 2021 · Melissa Brown
- Satellite Award for Best Television Series, Comedy or Musical 2022
- Peabody Award – Entertainment 2021 · Apple, Universal Television, Warner Bros. Television Studios, ...
- Critics' Choice Television Award for Best Actor in a Comedy Series 2022, 2021 · Jason Sudeikis

Why Do We Care?

It contains powerful lessons in leveraging sophisticated story techniques:

- to expand your brand
- attract the right kind of attention
- influence others to join you in striving for great things



Brain & Narrative

How and why we gravitate to them

Our instinct for narrative is a survival skill.

- To help make sense of our experiences of the world...our brains create a reconstruction of reality inside our heads and use **narrative** to simplify it.
- As a social species whose survival has depended upon human cooperation, our ability to communicate with each other has depended on being able to share the narratives in our heads and understand those in the heads of others (ex: the creation of language).



This roughly 4.5-meter-wide hunting scene was discovered in December 2017 on the island of Sulawesi. Measures of radioactive uranium's decay in mineral layers that formed over parts of the Sulawesi hunting depiction provided minimum age estimates ranging from 35,100 to 43,900 years.



The Neuroscience of Story

How it works

When we see or hear a story, the neurons in our brain fire in the same patterns as the speaker's, a process known as “neural coupling” or “mirroring.” These processes occur across many different areas of the brain and can induce a shared contextual model of the situation. (Stephens, Silbert & Hasson)

The motor and sensory cortices, as well as the frontal cortex are all engaged by stories, and deliver a cocktail of:

- **Cortisol and Adrenaline** - gets produced when something warrants our attention, like distress. Where we hear about potential threats in our environment -- or hear something distressing in a story -- cortisol helps us stay attentive.
- **Dopamine** – gets produced to aid in learning and rewards us (with pleasure) when we follow the emotionally charged events in a story (particularly at the end).
- **Oxytocin** - a chemical that promotes prosocial (the ‘love’ hormone), and empathic behavior. It's what enables us to identify with the hero/protagonist in a story.
- **Endorphins** - hormones that function as painkillers, inducing euphoria (“runner's high”), are triggered during the storytelling process when the story is funny and makes us laugh, or sad and makes us cry.



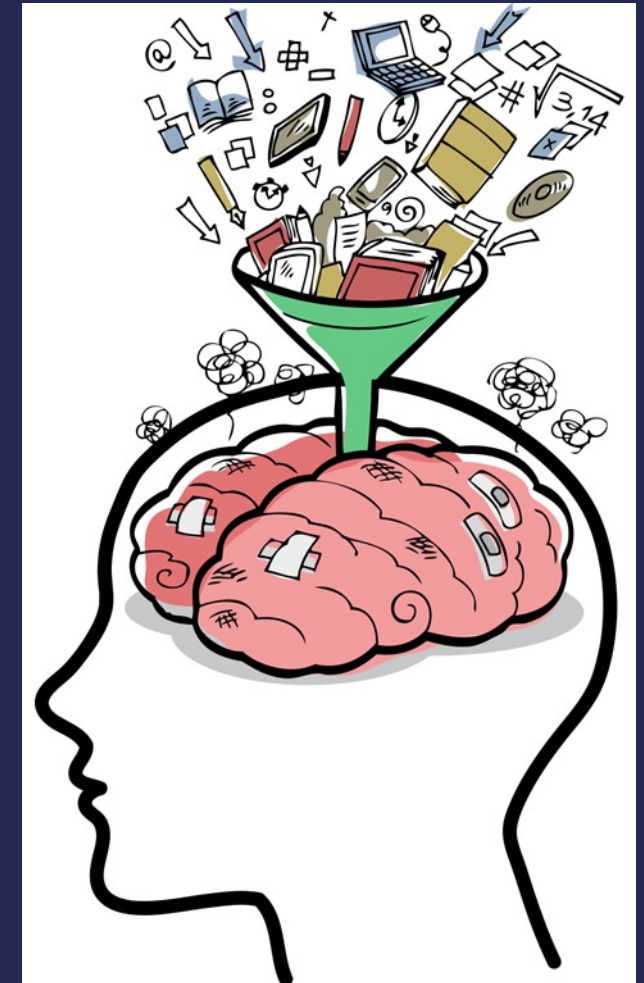
The Sensory Funnel

How We Capture the World Around Us - Grounding

“**Grounding**” is how the brain seeks to assign meaning to changes in patterns that result from sensory inputs.

Two Models

- **Outside-in Framework** – a stimulus reaches the eyes, ears, nose, etc., and the brain responds by causing neurons to fire.
- **Inside-out Framework** – action-initiating neurons combine with sensory inputs to provide an understanding of stimulus attributes, and a meaningful picture arises.





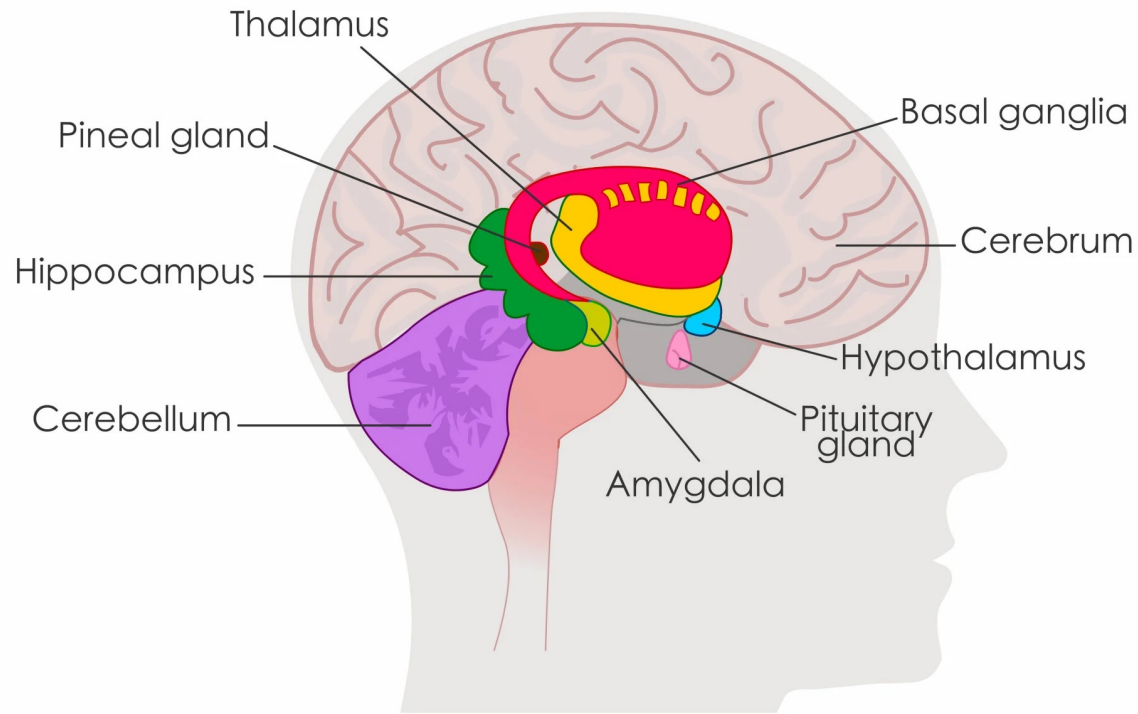
The Sensory Funnel

Mapping The Funnel (aka the limbic system)

The **limbic system** is a collection of structures involved in processing and regulating emotions, the formation and storage of memories, sexual arousal, and learning.

- **Hippocampus** - where episodic memories (what, when, where) are formed and then filed away into long-term storage throughout other parts of the cerebral cortex.
- **Amygdala** - emotional responses (happiness, fear, anger, and anxiety), interacts with the hippocampus by attaching emotional content to memories.

Limbic System





Cognition & Memory

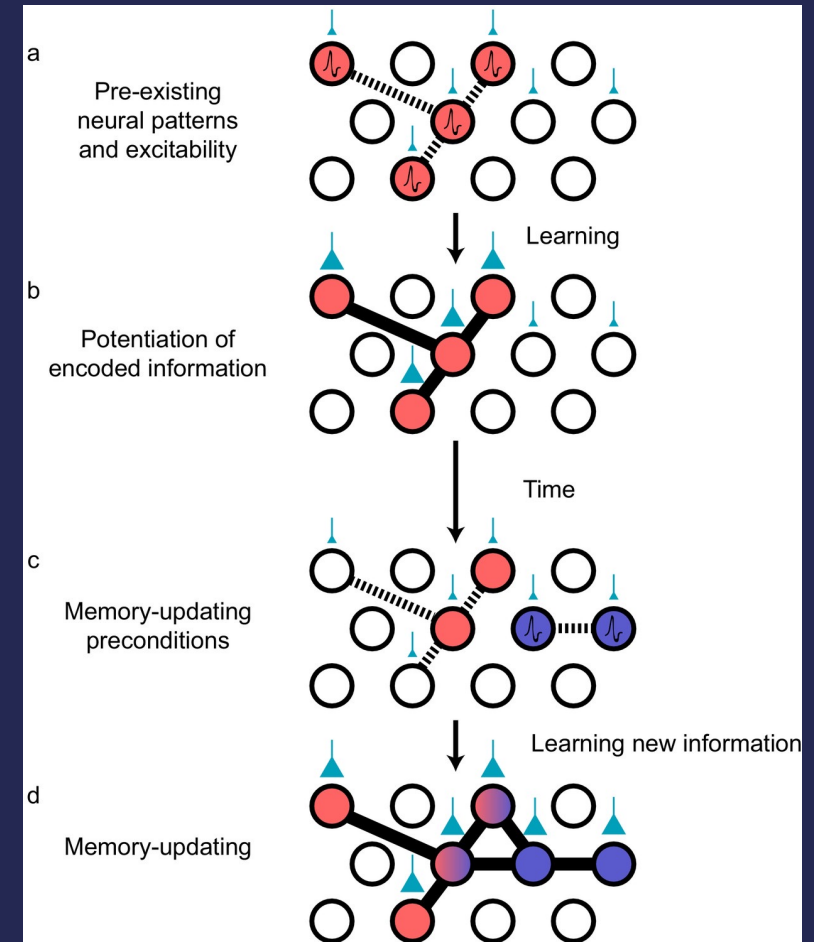
○ Engrams

An experience activates a population of neurons that undergo persistent chemical and/or physical changes to become an **engram**.

Engrams are:

- activated by a learning experience
- physically or chemically modified by the learning experience
- reactivated by subsequent presentation of stimuli resulting in memory retrieval.

An “*engram complex*” is a memory that is stored in sets of engram cell ensembles in different brain regions connected via an engram cell pathway.





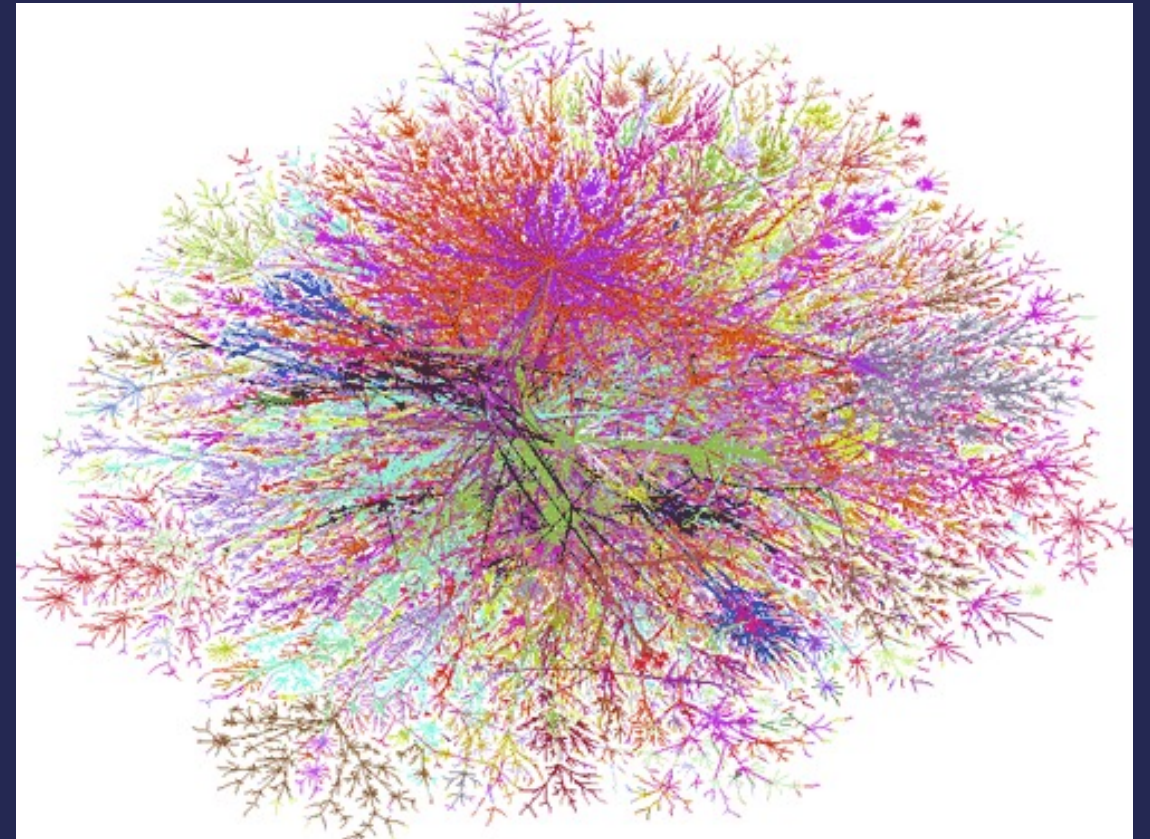
Mental Models

○ Schemas

The association linking multiple memory engrams is called a **schema**. These can be thought of as patterns that organize categories of information.

The brain organizes itself into a vast network of schemata, which the brain then constantly refers to (and updates) to make **mental maps** of the world around us.

The brain uses these maps to match new experiences with previous ones, make generalizations, and make it easier to operate cognitively.





Classic Story Archetypes



What is an archetype?

The term “archetype” means **original pattern** in ancient Greek.

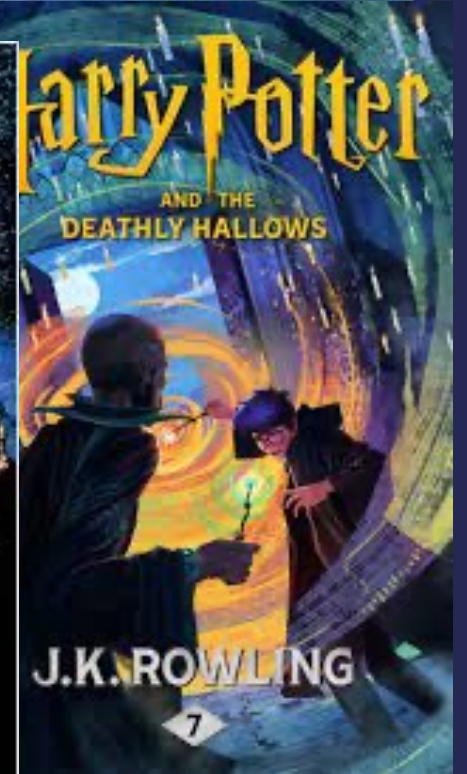
An archetype is a type of character, storyline, or event that repeats across the human experience. The structure creates a sense of familiarity, allowing us to quickly and easily comprehend an event or character.



Classic Story Archetypes

The Hero's Journey

- A **hero**
- Has a **problem** (a “villain”)
- Meets a **guide**
- Who calls the hero to **action**
- And gives the hero a **plan**
- That helps him **overcome failure**
- And ultimately ends in **success**



McCarthy Books
Thatchwell Street, London SW17 1LL

One small suggestion...

I'd change the title.

It's not about me.

It never was.

The Lasso Way

The Lasso Way

- Conditioning
- Versatility
- Awareness
- Believe

Lesson #1:

Make it simple but significant

A good story may be complex, but a great story is always simple.

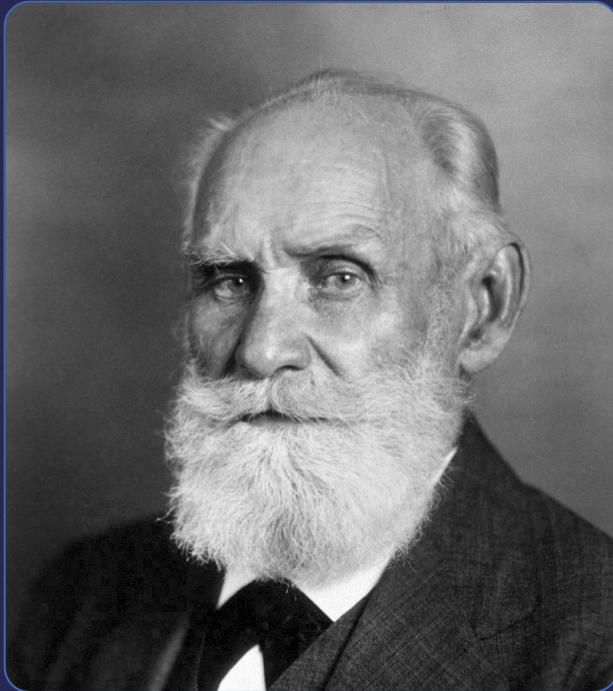
One way to test your story: pitch it to an uninformed party.

- Are they able to understand it?
- Could they repeat it back to you or share it with a friend in a similarly simple manner?

If not, you still have work to do.

When in doubt, simplify!

Conditioning



“Conditioning - a behavioral process whereby a **response** becomes more frequent or more predictable in a given environment as a result of reinforcement, with reinforcement typically being a **stimulus** or reward for a desired response.”

Ivan Pavlov

Stimulus-Response

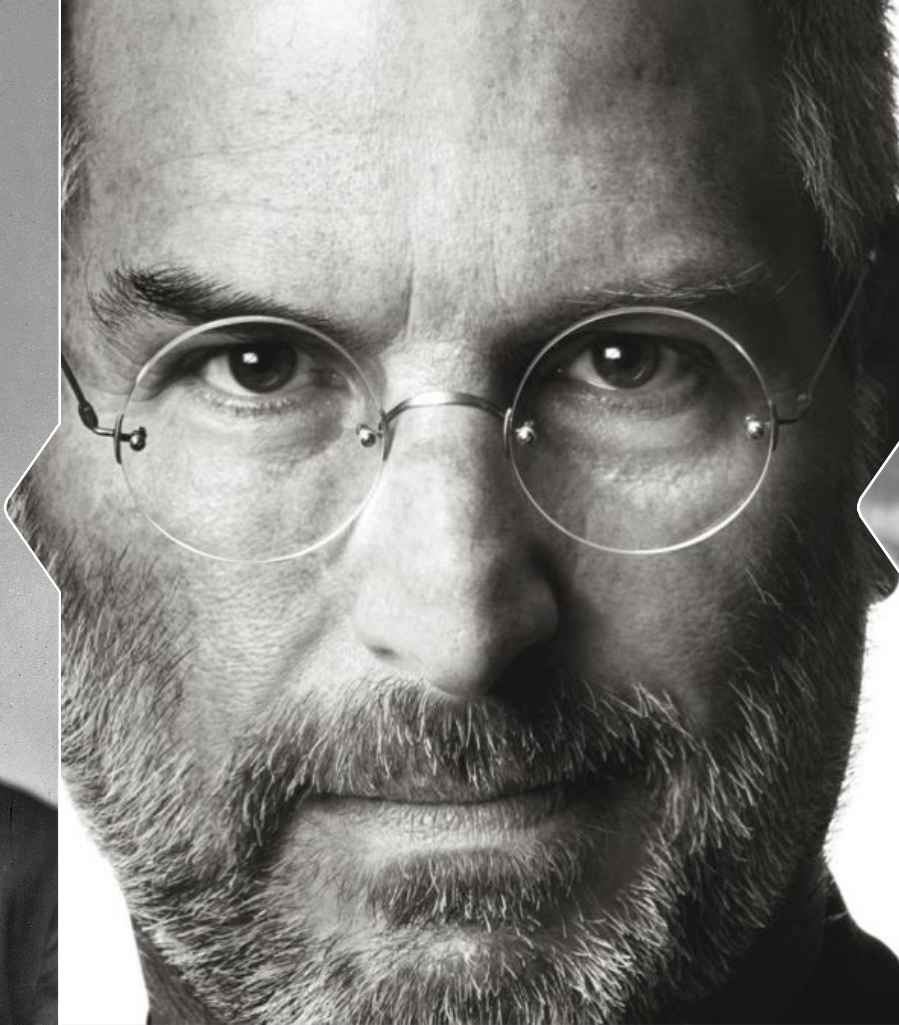
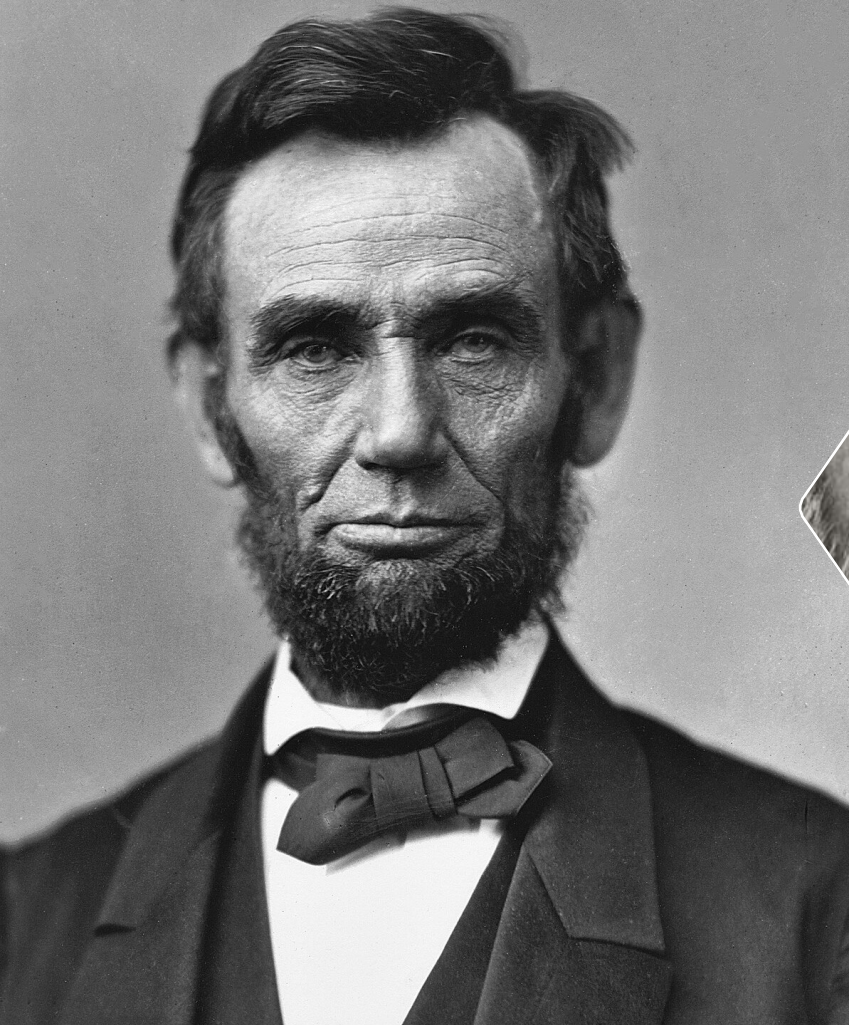
The Lasso Way

Lesson #2:

Repetition makes reputation

“The Lasso way: you haven't switched tactics in a week....you've done this over three seasons. By slowly but surely building a club-wide culture of trust and support through **thousands of imperceptible moments**, all leading to their inevitable conclusion.”

-Trent Crimm, Season 3, Episode 7



Lesson #3:

What is vs. what could be

Versatility

Create contrasts to craft a captivating narrative.

First, describe the reality ("what is"). Next, describe the potential future ("what could be"). The audience will want to understand why the world is not the way it could be and how to change it.

Awareness

Lesson #4:

Clarity of purpose

Who is the Audience?

○ Every great story begins with a well-defined audience. The story you tell has to be catered to the audience to address their needs, hopes, and desires.

What is your main goal?

○ What is the story trying to achieve? What does success look like? Do you have a burning desire to tell this story? If so, why?

If your answers to these questions are unclear, you're going to have a difficult time capturing your audience.

Believe

Lesson #5:

An authentic brand builds trust and loyalty

“I believe in believe.” – Ted Lasso, Season 3 Episode 5

Is your brand authentic?

- What do you believe?
- How is this reflected in your brand story?

The Lasso Way

Key Takeaways

Lesson #1:

- ❑ *Make it simple but significant*

Lesson #2:

- ❑ *Repetition makes reputation*

Lesson #3:

- ❑ *What is vs. what could be*

Lesson #4:

- ❑ *Clarity of purpose*

Lesson #5:

- ❑ *An authentic brand builds trust and loyalty*



Thank You

STORY
MARKET SERVICES

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Thank You!

Up Next:

**Future-Proof Your Practice: 7 Ways to Leverage
AI in Your Advisory Practice**

Tuesday, July 10: 3:00 PM EST / 12:00 PM PST

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Higher potential return generally involves greater risk, short term volatility is not uncommon when investing in various types of funds including but not limited to: sector, emerging markets, small and mid-cap funds. International investing involves special risks such as currency fluctuation, lower liquidity, political and economic uncertainties, and differences in accounting standards. Risks of foreign investing are generally intensified for investments in emerging markets. Risks for emerging markets include risks relating to the relatively smaller size and lesser liquidity of these markets, high inflation rates and adverse political developments. Risks for investing in international equity include foreign currency risk, as well as, fluctuation due to economic or political actions of foreign governments and/or less regulated or liquid markets. Risks for smaller companies include business risks, significant stock price fluctuation and illiquidity. Investing in real estate entails certain risks, including changes in: the economy, supply and demand, laws, tenant turnover, interest rates (including periods of high interest rates), availability of mortgage funds, operation expenses and cost of insurance. Some real estate investments offer limited liquidity options. Investing in higher-yielding, lower-rated bonds has a greater risk of price fluctuation and loss of principal income than U.S. government securities, such as U.S. Treasury bond and bills. Treasuries and government securities are guaranteed by the government for repayment of principal and interest if held to maturity. Investors should carefully assess the risks associated with an investment in the fund.

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