

Ep #11: Improving Your Communication Skills
with Joel Weldon, Hall of Fame Speaker and Speech
Coach



Full Episode Transcript

With Your Host

Tony D'Amico

Wealth and Life with Tony D'Amico

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Welcome to *Wealth and Life*, where you'll learn with financial planner, consultant, speaker, and business owner, Tony D'Amico. You'll hear stories from successful business owners and individuals about how they navigated the inevitable challenges that arose as they achieved each new level of success, and you'll get insights and strategies from leading wealth planning professionals on how to achieve your next level of success. Now here's your host, Tony D'Amico.

Tony D'Amico: Hi, everyone, and welcome to the Wealth and Life podcast. Today, we have Joel Weldon, who is a nationally known hall of fame speaker and speech coach. Today, we're going to talk about something that I think is very important and that's the importance of communication between an advisor and their client, and also effective communication is important for many of our clients. Whether it's in their professional lives or in their personal lives. I think we all know that our ability to communicate effectively really can determine the level of success that we want to achieve.

Again, whether that's in our personal or professional lives. So, again, I'm very pleased to introduce to you my speaking skills coach and who has become really a guide and mentor to effective communications for me, Joel Weldon. So, Joel is a nationally known hall of fame professional speaker who's been paid to speak at over 3,000 events in the past 46 years. Plus, he's a highly

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

sought after speaking skills coach and the creator of the Ultimate Speaking System. Joel has personally coached and critiqued well over 10,000 speakers and business leaders, and I can honestly tell you that I was really am fortunate that I am one of those folks.

With all that Joel has accomplished, in all of his experience, I said, "Joel, you're very experienced, how long have you been at this?" Joel just smiled and he looked at me and he said, "Tony, let me put it to you this way. My Social Security number is five." Well, hopefully, you're chuckling as I am now, because I sure was when he first told me that. Not only does Joel have great ideas on how you can communicate even better, he also has a wonderful sense of humor. Joel and his wife Judy have been married since 1963. They have two daughters and four grandkids.

Joel was an avid slalom water skier, a sky skier, and a wake surfer at a private lake in Arizona and at Lake Powell in Utah on his house boat. One thing I could tell you about Joel is high energy and a high quality of life is what Joel is all about. So, Joel, welcome to the podcast today. I'm really excited to have this conversation because I really do think communication is very important. So, welcome.

Joel Weldon: Well, thank you, Tony.

Tony D'Amico: Great. So, I guess, Joel, to kick things off, I'm really interested to dig into you on a couple of topics. So, the first one is really digging into that overlap or that intersection between what you teach advisors and how

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

that helps their clients achieve success. So, I'm curious what you think what the communication skills are that lead to that success, whether it's speaking, or presentation skills. So, I'm just really curious what you've witnessed in other advisors where you feel like they have a great level of communication with their clients.

Joel Weldon: Well, that's a great question to start with. So, as you're listening to this podcast and perhaps you're a client of Tony's or you're a friend of somebody who knows Tony and what he does, then, that's why you're on this podcast. But when you think of the role of the financial advisor, that if you are a client, somehow you met Tony. You were referred to him by a friend who is a client, or you went to one of his seminars, and somehow you made a connection and you like what you saw. Because you like what you saw and heard, you entrusted him with your money.

You have worked a long time to save up the assets that you have accumulated and now you turn them over to a financial advisor. That has to be based on trust. So, Tony was asking what qualities do I work with advisors on in their communication skills. That's really the most important thing, is trust. So, if you are a client of Tony's, and Tony, would you agree with this? They had to trust with you, is that correct?

Tony D'Amico: A hundred percent, right. Absolutely. As you mentioned, they've worked their entire lives to save and they've made sacrifices, so it's an important relationship. Trust is the cornerstone.

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

Joel Weldon: I'm sure, if you've been a client for a while, you know you've made a very wise decision. Because there's an old expression, how you do anything is how you do everything. If you look at the things that Tony does, he does everything in a professional way and the right way. The I's are dotted and the T's are crossed. He follows the rules, but he's also creative and innovative. So, one of the things about communication that people misunderstand, especially when they hear the term Joel's Speaking Skills Coach, or a Speech Coach.

They think, "Oh, it's about how to perform and how to get your message across." That's the exact opposite. That's acting. That's performance. One thing you want to do, and I'm sure since you've been successful in your life, people would say, "Well, what you see is what you get." Which is you're congruent, and when you're congruent, you're not performing. You're not acting. So, our whole system about how to be a more effective communicator is built on three basic beliefs, one, that speaking is a learned skill.

Two, be yourself. It's not an act. Number three, it's all about your audience. So, this podcast is not about Tony and Joel, it's about you and how can you be an even more effective communicator. Whether you're retired now and you're communicating with those you love, or the charities that you work with, or the community groups that you're involved in, or if you're working. How do you communicate even better and still be you? Because there are some people who are dull and boring. Tony is not one of them, but if he was, my first recommendation would be, don't change.

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

You're the dull, you've spent your whole life being you, why would you want to be somebody else? Now, there is a way that you could handle that. If you are dull and boring, then just put that in the introduction. Now, Joel is very knowledgeable in X, Y, Z, but you'll notice he's pretty boring. He speaks in a monotone. He has a slow cadence to his voice. Many people fall asleep when they listen to him. The reason we have him on this podcast though is not to put you to sleep but to give you some ideas that will help you in X, Y, and Z. He's an expert in that area.

Nobody knows more about X, Y, and Z than he does. So, here's my assignment for you. Make sure you're with somebody as you listen to this podcast that could keep you awake. So, if you start to fall asleep, they'll wake you up, and if they fall asleep you wake them up. By the way, in the studio here, in this interview I have somebody next to Joel to wake him up if he falls asleep while he's talking to you. All right. If we put something like that in the introduction, we're overstating how boring the speaker is and how monotone.

When he starts, people are going to start thinking, "Oh, he's not that boring. Well, that's not such a terrible monotone." But we brought it up, and that's one of the things to do. If you have an accent, put that in the introduction. English is his second language. He's originally from Romania. Oh, okay. Then, they know where the accent is from. So, those are little tweaks in communication, but the most important thing is to be yourself. Be the real deal. That's why I love working with Tony, because every time we have a call, we're working on some kind of a project of his, he's always the same.

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

He's happy. He's receptive. He remembers what we're talking about, and the same thing for you. Whether you're working with your grandchildren, or your friends, or a charity, or you're working in one of the wonderful companies that are there. If you're in the Ohio area, you got NASA and you've got some of these clinics that are around all the time. I made a note in Ford and Sherwin-Williams, those are the people that need to know that you're the real deal. What you see is what you get. So, hopefully, that answers your first question, Tony.

Tony D'Amico: No, that's really helpful. I guess any other tips that you have for our clients. Again, maybe it's their professional careers, that they want to communicate better in making ... or, maybe it's their personal lives, too, communicating perhaps values or lessons to children or grandchildren is something that's important to folks that we work with as well. I guess, any other maybe common areas that you feel like people can focus on? Because you mentioned it's a learned skill.

So, yes, we are who we are but there's a portion of this that can be learned. So, I'm curious maybe some other areas that you think folks can focus on to maybe become a better communicator.

Joel Weldon: Well, the words you used, Tony, that's a great way of expressing. How do we communicate even better? Well, we use words. Sometimes, one word can change the meaning of everything. So, let me just, since you're the only I can get feedback from right now, if I said to you, "Tony, I could help you earn more money." Does that

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

sound pretty good? Or, "Tony, I can help you get in better shape." Does that sound like a good statement?

Tony D'Amico: It's pretty direct, it's easy to understand and concise. So, I would say, yes.

Joel Weldon: But what does it really mean? It means you're not really in good shape, and you're probably not making enough money. But if I add one word, a four-letter word, a good four-letter word, even, if you will add even before you write in an email or speak to somebody before the words more or better, watch what happens. I can help you earn even more money. I can help you be in even better shape. I can help you be even happier. All of those give you credit, credit for being financially successful, credit for being in good shape, but there's another level.

You could take it up a notch. That's what we're going to talk about. So, there's a way to uplift people, to put a more positive spin on what you're saying, just add the word even before you say more and better

Tony D'Amico: So, the choice of words is—

Joel Weldon: Choice of words.

Tony D'Amico: Because what that communicates or what that implies and most importantly how that makes someone feel is, I think, also one of the things I've learned from you. We've met, I think, about four years ago now, but there's a lot to communication to factor in. It's really an art and there's many pieces to it. I guess with that-

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

Joel Weldon: Well, before you go on, let me comment on this. Right now, I just happened to watch the news as I'm having breakfast this morning and the impeachment is starting in the House and somebody mentioned, your words have power. If you think about that, your words do have power. Your words create pictures. So, let me give you an illustration, certainly not in the political world because we don't want to get into that at all. But this guy is out on a date with his girlfriend, and his buddy, and his buddy's girlfriend, the four of them.

The friend overhears him say to his girlfriend, "When I look at you, time stands still." She falls into her arms and kisses him. Well, the guy who hears this says, "Boy, those are great words. I'm going to try that tomorrow night with my girlfriend." So, the next night, he looks at his girlfriend and says, "When I look at you, your face could stop a clock." Now, he thought he was saying the time stands still, but it didn't come out that way. He used the wrong words. So, Tony, you're absolutely right. The words that you use is so important.

Like you, you're a fiduciary, now that's a word that the average person doesn't understand but since I worked with so many advisors, I understand that. That means you put your client's interest above your own. That is a powerful word, and I know you use that with some of your newer clients to explain how you run your business. So, yes, choosing the right words. Remember, your face does not stop a clock. It's not going to get you any good response.

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

Tony D'Amico: It's not going to get you very far. That goes back to that congruence piece. I think communication's easier if you're being congruent to yourself and what you believe in and what you care about. I guess maybe along those lines, there's a couple of communication, I guess I would call them concepts or things that I think that are important in communication. One of the things that you've reinforced in working together is kind of, this is I think important in an advisor-client relationship, or for clients that are wanting to communicate something to someone that they're communicating with.

Starting with the end in mind, and that intentionality, and I love your concept of the golden thread and I guess perhaps would you like to talk a little bit about starting with the end in mind and what a golden thread is?

Joel Weldon: Yes. So, a golden thread, well, let's just put it this way, when you're communicating with somebody, let me give you a metaphor, it's like a bus ride. If you're the communicator, you're the bus driver. The message that you're communicating, and whether you're communicating to your children, grandchildren, employees, or a potential prospect or client, you are the communicator, so you are the bus driver. The passengers are your audience. It could be one or it could be 100 people. The bus is your message, but the sign on the bus is really the golden thread.

The golden thread is one sentence that summarizes what you're going to talk about. So, let's say Tony, because he does send you out printed material updating things, and let's just say he wants to send you ... and Tony is very

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

good at making a video. So, he's going to create a video on what is the impact of changing our president and having Biden as President and Trump leaving? What implications does that have for you as an investor, as an American? From a financial standpoint, he's going to share some background information based on what's happened in the last 10 transitions.

From a Republican to Democrat, or a Democrat to a Republican, where we've had a change in political parties, how does that impact the stock market. Okay, so you hear, I'm always giving a presentation. So, what would be the golden thread? In one sentence, what would be the sign on that bus for Tony's video? How the change in leadership of America will affect you financially? That's what this message is about. That tells the passengers, when they get on the bus, where that bus is going. Now, since you have heard many speakers, you've watched many presentations, how many times have you said to yourself or the person sitting next to you, what's this all about?

Where is this going? I don't understand what's happening here. Unfortunately, that's all too common when it comes to communicating. But if you have, in your own mind, a golden thread, before you start a letter, what is the golden thread of that letter? If you're sending an email to somebody, if you're making a presentation doing a video, having a client call, what is the golden thread? In one sentence, where are you going to take that person you're communicating to? Because remember, why that metaphor of the bus is so important, if you've been on a bus, you know what?

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

You can get off. If you get off, you're no longer involved in the message. Now, since Tony's work, and my work, and your work if you're still communicating, is done in a virtual world. We are not having meetings now. We're not in front of people. So, if you are invited to this podcast at a local hotel and you were sitting in a ballroom with a hundred other people, changes are, you're not going to get up and walk out. Now, you might not be interested in what's being said, so you might reach for your cellphone and start checking texts and emails, but you won't get up and leave.

That's not you virtually. On this podcast right now, you can get up and leave. Click off, it's over. You just got off the bus. So, we got to make sure you know where this bus is going for you. How you can be a more effective communicator using the right words, and then those three basic beliefs, that it's a learned skill. The more you do it, the better you get at it. To be yourself and it's all about your audience, it's not about you. So, Tony, is that helpful?

Tony D'Amico: A hundred percent. I think that really, again, I think that speaks to how that's important in an advisor and client relationship, and then how our clients can use this in their lives. But I think when you're starting with that golden thread or where we're going, I think that also tells people that number one, they know what to expect. So, if they know what's coming, then, they're going to be more receptive to it. I think it also shows a respect for them, because again, it's not about you.

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

It's about the importance of something that you want to communicate because you think it's positive for the other party. So, it shows that you respect their time and that you respect transparency. So, I think that's really important. I think it sends a lot signals that might be not maybe on the surface, but maybe subconscious that you do value their time and want to be transparent. So, yeah, absolutely.

Joel Weldon: Because you said that so well, and that would mean in an email, and that's why you have a subject line. How does the current change in leadership in Washington affect you financially? That could be the subject line. Oh, okay, so this is about the new President coming in and how is that going to affect the stock market. I think I want to read this. But again, as you're listening to this podcast, think of how many times in your mind you would thought of that statement I said. Where is this going? What is this about?

That's the communicator's fault for not making it impossible to be misunderstood, and that's the goal of all your communications, with your loved ones, with your workers, with your clients, your associates. Make it impossible to be misunderstood.

Tony D'Amico: Yeah, absolutely, that's awesome. You're talking about how it's not about us. It's about the person that we're talking to or the person that we're working for, right? We're here to serve our clients and make a positive difference for them. Our job is to know what's important to them. Their goals, their values, their important relationships. Then, help them with their financial life planning and wealth management to help them achieve

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

what's important to them. That's a very special relationship, in my view, but because it's not about me or not about you or us, I think it brings up another very valuable aspect of communication.

What I'm talking about here is the importance of listening and sometimes not saying anything to really understand the other person and maybe what's important to them. So, Joel, would you like to talk about listening and how you feel that's part of communication?

Joel Weldon: I'm sorry. I didn't hear what you said.

Tony D'Amico: No, because I know you so well.

Joel Weldon: You didn't bite on that one, huh?

Tony D'Amico: No, I didn't bite on that, that was still great though. Classic Joel.

Joel Weldon: Well, you've made fun of how old I am. Listen, I've been around so long I could remember when Baskins and Robbins had just one flavor. Burger King was only a prince when I started. So, yeah, I go way back, but listening is certainly one of the keys, especially in one on one communications. Now, maybe we should just add some listening techniques for a virtual world. Now, if you are working and you're part of this podcast, I'm going to say that most of your communications with your clients and customers and maybe your team members is through a virtual world like you and I are experiencing right now.

So, one of the things that you can do to make sure that you're listening is to use the chat box. That's a powerful

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

tool that we don't have at a live meeting. So, as an example, let's say you're having a team meeting and you open with the golden thread. So, what we're going to talk about since we're in the first couple of weeks in 2021, what the plans are for this year and mostly, what our first quarter goals are. That's what we're going to talk about.

Now, before we get into some of the details, would you go to the chat box and on a one to 10 scale, one low, 10 high, how excited are you about this new year? One, take me back to 2020, COVID-19 was much better than what's happening now, 10, this is going to be our best year ever. Put a number one to 10. Now, why am I suggesting one to 10? It's only one or two key strokes. But if I said to you, "All right, write in the chat box your three most important goals for this next year." Now, I type with one finger. It would take me about a month to type that in and it wouldn't be effective.

So, you'd get a much better response if you ask yes or no. I may even have them, instead of writing yes or no, I have them write N for no, Y for yes. So, just type in. Since we're going to talk about this book today and this book happens to be in front of me, and that title is, Who Not How? How many of you have read this book? If you've read it, just put a yes. That would be a Y, if you haven't read it put an N for no. Okay, Tony, as you're looking at that chat box, do we have more yeses or no on reading the book? Tony, can now give me a feedback on where you are. That's what I call listening virtually. Asking your audience questions that you will use in your presentation.

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

Now, when it comes to listening, if you accept that third premise or belief about speaking, first belief is that being an effective communicator was a learned skill. Number two is be yourself, and number three, it's all about your audience or the people you're communicating with. If you accept that third belief, then you are going to be focused on what they say. One little thing that you could do when you're in a conversation is add sounds. How many times have you been on a telephone call with somebody and you're talking about something, talking, talking, talking, and then, you say, "Are you still there?"

Because there's been no sound. So, one thing that you could do to prove you're listening is, as Tony is talking, I would say, wow, oh boy, well, that was great. Just dropping in something like that that's appropriate for what the other person said, which proves what? That you're listening. So, hopefully, Tony, that's helpful.

Tony D'Amico: That is very helpful, and that's a very helpful reminder for myself and I'm sure a lot of the people that are listening. Yeah, you're right. We are predominantly in a virtual world at the moment and those little things do matter. I remember it's middle of January 2021 now, but back in March, it was a complete adjustment. We've used Zoom in the past. We have clients in out of State, Florida, Chicago, other places, so we've used Zoom, but it's different when you're using Zoom every day and you start to pay attention to the little things. Whether it's a client meeting, because you're not getting that in-person feedback, non-verbal feedback that you were before.

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

Even team meetings like you've mentioned too, I think that's really important. Even if it's a sound, or like mm-hmm, it sounds good, or if you're on a video call kind of shaking your head. I think that eye contact, too, is really important. You don't want to make excessive eye contact, but I think making that eye contact intermittently is important. Because it does show that you want to connect and listen. So, that's all very helpful and very good stuff. I really think another important aspect of communication, and I don't know if we've talked about ... I don't think we've talked about this before.

But I think another important aspect of communication that I hope somebody to communicate well, and I'm thinking about this for a minute, that advisor-client relationship and just in general, is if you have a specialization or a niche, and you have a process. I think about how much easier that's made it for me to communicate to people because we have three distinct areas of expertise and that's it. By specializing you magnify your impact on the client but you also learn certain areas inside and out that make a difference. So, different planning strategies.

Yeah, I think having specializations and not being too wide facilitates easier communication, because you're not having to communicate a million concepts. Just maybe 100 concepts, but what's your take on that?

Joel Weldon: Well, I think you said it very well, that you don't know everything. You have a specialty. As you've looked at the career that you've had, as you're on this podcast, you might have had five or six ... They say now, the average

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

high school student will have 14 different careers. Because we know that working for Ford Motor Company, as an example, 50 years ago, that might be your entire career, and you then have a retirement. Well, we know we don't have those anymore. So, yes, it's important to have that specialty skill, but I think it's also important when you're communicating to know what you know and what you don't know. There's nothing more powerful in saying, "I don't know, but I'm going to find out."

Because that area of text is not something I really am that familiar with as an advisor, that's why we have our tax advisory team. So, let me check and I'll get back to you on that. So, I think you're absolutely right, Tony, that having that specialty is important and finding people who have the specialty you don't have. That's the key, is finding people who can support you in the areas that you're not an expert in. If you needed brain surgery, I don't think you're going to do that yourself, or go to your brother-in-law and say, "I don't want to go to a hospital."

I know that the Cleveland clinic is terrific, but I think we could save money. Why don't you do that brain surgery for me? Go on YouTube and look at some videos." I don't think you would do that.

Tony D'Amico: For sure, yeah.

Joel Weldon: So, yeah, being an expert in something is important and the other thing that you saw I've alluded to in the beginning was the development of systems. I'm a big believer in systems. Now, when it comes to speaking, why I've had such a long and successful careers is I've

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

made so many mistakes. I've made every single mistake a speaker could make once. The goal is, don't keep repeating a mistake. Develop a system to prevent that. Once I figured out what works and what doesn't work about speaking and proved it by results, then I systematized everything in the speaking process. A system for introductions. A system to open any message. A system to close a message.

A system on how to have an effective call to action. A system on using visuals. A system on stories. That's what you need to think of. If you want to save time, effort, and energy in whatever you're now doing, whether you're retired or working, be big on systems. It's amazing. Like, when are you going to fly again? Now, I used to fly all the time going to speak all over the country and outside the country, but not now. I haven't been on an airplane in, well, it's going to be a year this January. Last trip was, yeah, I think it was January 14th, where I went to Vegas. So, it's been a year since I've been to the airport.

But when you get on an airplane again, do you think the pilot is thinking, "I don't know, how do you think we should fly to Cleveland? What should we do first? Do you think we should start the engines, or should we check our gauge, or passenger manifest, anybody got any ideas what we should do here in the cockpit?" No, every good pilot, they've got a checklist. They're going to go right from the beginning to the end. No matter how many years of experience that pilot has, he follows this system. That's why you are so safe traveling on our airlines because they have solved those problems. Then, that new Boeing

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

jet that's back in service again, that had crashed two times, they found the problem.

Now, they developed systems to prevent that problem from ever happening again. That's the beauty in your life, a system so that you can save time, effort, energy, and money, and that's what system is. It's an acronym, S-Y-S-T-E-M, saves you time, stress, energy, and money. So, build a system.

Tony D'Amico: Yeah, that's so helpful and so valuable, Joel. Thank you for that. That's great. It's so true. So, if not, you're going to spend your energy on areas that you shouldn't be spending your energy on. Boy, that is a great segue into the last item that I've identified in preparing for our podcast. I wanted to get your, obviously, enlightenment on this last piece of communication, but you mentioned it, energy, not spending your energy to do those fundamental things, but that allows you to save the energy for the communication, which I think is important. Because the fact that I'm talking about of communication is personal energy. I really believe that personal energy is really important in conveying something.

So, not every communication there has to be a tremendous amount of personal energy, but it's been said by many people in our industry and other experts that personal energy, if the advisor invest personal energy into their client to communicate something, because they know what's important to the client, they know what they need to do to achieve what's important to them. That if there's something that they should have in place to have some personal energy in communicating that. That is key

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

for the client to matriculate and change their financial positioning, whatever aspect of it that might be. So, I know that's probably congruent with be yourself.

I would probably say that if you just naturally care, then you are going to place that personal energy. But you're the expert here, so Joel, I would love to hear what you think about the importance of personal energy in communication.

Joel Weldon: Well, I think you answered your own question with what you described at. I think you're 100% right. Maybe the word that could throw some people off is the word energy. Usually, when we talk about a person's energy, we're talking about their enthusiasm, their excitement, how they come across. As you're watching this podcast, listening to Tony and myself, we're both energetic people. When you talk to Tony, and he has his entire background, so it comes out of it. He has that passion. There are some people who don't show that. Now, usually, with me, and this is not an act, this is how I am, ask my family, all the time.

My daughter is both working in our business. Jenny, my youngest daughter is one of our coaches, Jill, my oldest daughter is our Chief Financial Officer and runs the business for us. We see each other all the time and it's the same. Whether I'm doing a podcast with Tony or talking to my daughters, or my wife, or a potential client, it's all the same. That's what you need to be, but what if you don't have a lot of enthusiasm? Then, you can say something like this. I know that I don't come across very

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

excited about this, but inside, I'm really excited. It just doesn't show on the outside.

Just say that to people, and we all know people who are reserved and less energy on the outside, but they could still be very excited about something on the inside, it just doesn't come out. So, just tell that to somebody. But yes, that's important. Again, it's a skill that you learn, and I'm such a proponent of that first belief, because there's nobody less qualified to do what they've done than me. In high school, I never gave an oral report. I was terrified standing up in front of my classmates. I couldn't lead my Sunday school class in silent prayer. That's bad. Do you remember some kids in high school like that, that never said anything?

My nickname in my family was the lamp. I had an uncle who said, "Joel is like a lamp. He sits in the corner. He doesn't even have a bulb. Why don't you say something?" And I didn't, and it wasn't until September 4th, 1969 at 28 years of age, I gave my first presentation in front of a group, at 28. You know what happened, Tony? Just imagine, you haven't been able to communicate, speak, and you are forced to stand up in front of a group. There were 17 people in the room, in Tempe, Arizona, and that was September 4th, 1969. After the meeting was over, I'm packing up my stuff, a guy comes back in that was at the meeting and he says, "Would you like some feedback?"

I said, "Sure." He said, "This was the worst meeting I have ever been to, and you young man are the worst speaker I have ever heard in my whole life." Now, if that was you, as you're listening to this, if somebody told you

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

that, what would you have done? You know what I did, Tony? I was crying like a little baby, it hurt so bad. Then, he yelled at me, he said, "Stop crying. You're not a baby. You're a young man. I'm going to fix you." I said, "what do you mean fix me?" He said, "Tuesday, September 9th, you're going to show up at Brad's Coffee Shop on Rural Road in Tempe, and we're going to fix you at our Tempe Toastmasters club." I said, "What's Toastmasters?" He said, "Don't worry about it. Show up." He walked out of the room.

Tony D'Amico: That's great.

Joel Weldon: Now, do you remember the day your life changed, Tony, for the better?

Tony D'Amico: I do, yeah.

Joel Weldon: There was many days, I'm sure, where you've had life changing, and as you're listening to this podcast, think in your own life of something that happened to you that was a turning point. Well, that was a turning point in my life, because I went to the Tempe Toastmasters Clubs that Tuesday, September 9th, 1969, and I knew I needed help. That's where I learned that first belief, that speaking is a learned skill. I'm still a member of Toastmasters over 50 years later, because I'm a slow learner, but you constantly need that kind of feedback. So, if you've never been to a Toastmasters Club, check it out. We have 200 in Arizona, and we're a small State.

So, in Ohio, there's probably 400, 500 toastmaster clubs. Just look on the toastmaster clubs and check out a bunch of them, and see if it can help you. It's a group of people

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

who get together to help each other be better communicators.

Tony D'Amico: That's awesome.

Joel Weldon: So, you're right, let that energy and passion come out or at least say it's there if it doesn't show.

Tony D'Amico: Yeah, that's awesome, and I love that point, too, Joel. There are going to be some people, we have clients that are very successful and that aren't that maybe passionate when they speak, but they do still effectively speak. I think even though that passion isn't there, you could always say like you said, if they know that you're not going to be speaking in a passionate manner or with a lot of energy, you can just simply state, "Mr. and Mrs. Jones, in working with you as our client I know what's important to you and you have this goal. Because of that, I really think that doing this particular strategy would really help you and make a big difference for you.

So, it's been on my mind, because I know you guys and what's important to you, but I just wanted to make sure I communicated that." So, I think just being maybe just transparent in the communication. Sometimes, letting somebody know that you understanding what's important to them, that you've heard them, and that you care about them sometimes, is all the energy that someone might need to know that you're just trying to look out for them. I think that's a big part of being an advisor.

Joel Weldon: One way you could do that is use an example, I just happened to see on the news about the lottery. I don't know if you noticed, Tony, that there's two big Powerball

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

things coming up. Maybe it's already been chosen today, and it's worth a billion dollars.

Tony D'Amico: Wow.

Joel Weldon: They would say, "What are the odds of winning a billion dollars in these two lotteries and the odds of winning both of them on the same day?" It was in the trillions, whatever it was, but the point would be to show that you're boring and quiet and reserved in a positive way. So, if I was talking to you and I was that way, where I was not very expressive and not very high energy, I say, "Tony, as I told you I'm really excited about the things that you shared and I know it doesn't come over, but on the inside I'm really excited." As an example, if I found out this morning that I had just won both Powerball lotteries for a billion dollars, I probably would have said, "Oh, I wonder what the taxes are going to be."

I think I probably should call Tony and see what happens. That would be it. But if you are what I wanted, well, what would a good Italian boy do? All, any, come in, come in. Look what's happened.

Tony D'Amico: Right, absolutely. That's great.

Joel Weldon: Well, Tony is such a positive guy and he has so much energy. If Tony was the captain of the Titanic, he would have just said to the passengers, "We're just stopping for ice." Not everybody has that outlook in life.

Tony D'Amico: That's funny.

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

Joel Weldon: So, hopefully, you do, and hopefully you're chuckling a little bit, because you got to laugh.

Tony D'Amico: You do, yeah. We haven't talked about this, but how you tell stories and use analogies to illustrate a point and just the importance of humor are obviously a really important piece of the recipe, if you will, of having a positive, effective communication with somebody. You have me smiling. I've known you for, again, four years and each time I talk to you, I always smile and laugh and learn.

Joel Weldon: You're an easy laugh, Tony.

Tony D'Amico: So, awesome. So, Joel, as we wrap up, is there anything else that you feel like we should talk about as far as communication, or do you feel like we covered it?

Joel Weldon: Well, I think if you just keep in mind those three beliefs, that it's a learned skill, the more you do it, the better you get at it, as long as you keep improving the mistakes that you make so you don't make them twice. The second belief was, to be yourself. If you have things that could distract, like we're talking about energy, just bring it out. Either have somebody who introduces you, if it's a formal presentation you're making, or just in private conversation, just say that. I'm sure you do that with your spelling on your emails.

When I send an email and I'm writing a long, let's say critiquing a video one of my clients sent me, I'd say, "Please excuse any spelling mistakes and grammatical errors, or punctuation omissions since I'm dictating you this on the phone." The reason is, I can't spell very well. When you graduated in that quarter of the class that

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

made the top three quarters possible, I didn't get really a lot in the spelling area. So, that's a way to anticipate it. Then, of course, being yourself and making it all about your audience. Hopefully, you're on this podcast and you're going to be on other podcast because you feel Tony is bringing you something for you.

It's not for him. He understands all these ideas. It's about you, and that's what you need to bring to the people that you communicate to. It's about them. Get yourself out of the way.

Tony D'Amico: Joel, that's awesome. Thank you very much. For our listeners who may want to connect with you, is there a certain website they should go to—

Joel Weldon: Well, we have all of our tools and our coaching programs and the online programs on ultimatespeaker.com. Ultimatespeaker, no spaces, not capital sensitive, dot com. There's a promo code on there, it's Tony, because anything we have for Tony or any of our clients is available at a 50% discount. We're not doing this to try and pile in the money, it's to really provide a service to people. So, you can cut it in half and just use the promo code Tony, if you're interested in anything. Or, just put a note in there and we can have a conversation, if that's important to you, or let Tony know, if you have some needs.

Tony D'Amico: That's awesome. So, just to clarify it, is it ultimatespeaker.net or ultimatespeaker.com?

Joel Weldon: Either way will get you there, but I would go with com. We also have ultimatespeaker.net, too.

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

- Tony D'Amico: Okay, perfect. So, both of those? Great. Then, there's a way for them to contact you through the website?
- Joel Weldon: Yes.
- Tony D'Amico: That's awesome. Well, good. That's awesome. Well, Joel, as we wrap up, I'd like to ask you our signature podcast question. So, this podcast is about achieving success, where wealth and life intersect, and each person has their own definition of what it means to be wealthy and success even means different things to different people. Joel, you've had what most people would call an extremely successful career, and you've made a huge impact on business leaders and advisors across the country. But when you think about the intersection of wealth and life at this stage for you, what does success look like for you moving forward?
- Joel Weldon: You notice the words you use at this stage of your life. All right, why don't you just say what you mean? As old as you are—
- Tony D'Amico: No, we're all at different stages, right?
- Joel Weldon: Yes, we are.
- Tony D'Amico: There's stages of—
- Joel Weldon: The stage coach is coming in to town right now.
- Tony D'Amico: You're funny.
- Joel Weldon: Well, I'm what? Nine months away from 80, but I feel like I'm just coming up to 40.

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

Tony D'Amico: That's awesome.

Joel Weldon: Well, my definition of success is one that Earl Nightingale, the Dean of Personal Motivation who created The Strangest Secret, the largest sold recording ever made of a spoken word message, made this definition and I've kept it as my own for all of these decades. Success is the progressive realization of a worthy ideal or goal. So, if you're moving towards something, you're successful. It's not on reaching it, it's moving in that direction. So, at this point, I have no thought of ever retiring. I haven't worked in years, decades, because my definition of work is, work is what you're doing when you'd rather be doing something else.

So, when you love what you do, and Tony, I know you love what you do, too, it's not work. It's not, "Oh, I got to go to the office today." I get to go to the office today, isn't this wonderful? I get to do a podcast for you today, that's so exciting. That's how you should be living your life. We have Sun City here in Arizona and when Sun City opened, people were so excited, they moved from all over the country. They got here and a year later, they were dead, because they didn't have anything to do. Life is moving forward. Nothing in life, Tony, stand still, freeze, either they're growing or they're dying, animal do. Getting better or getting worse, same thing with people.

So, we want to keep moving forward, and that's why your podcast is so important for your clients that have retired. Nothing wrong with retiring, but don't just sit there in the couch eating potato chips and watch television. Contribute. Get involve with a charity. Get involve with

Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

community work. Rescue dogs. Do something. Find people like Tony that needs something on top. You could have a purpose in life. Tony, you're supposed to be laughing at that one.

Tony D'Amico: No, that's great. No, I love it. I think this is extremely valuable and helpful. So, I cannot express my appreciation and gratitude for you enough, and how highly I think of you, and how fortunate and blessed I am to have you in my life. So, thank you very much, Joel. Each encounter always has me smiling in a different way. You never cease to amaze me. Well, thank you, again. It's totally been, again, my honor and pleasure. So, thanks for being a guest today on the show.

Joel Weldon: Truly, truly pleasure. Now, as you're listening make it a great day.

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Wealth and Life with Tony D'Amico

Ep #11: Improving Your Communication Skills **with Joel Weldon, Hall of Fame Speaker and Speech** **Coach**

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