



Upledger Institute

PRESENTER'S MANUAL & MARKETING KIT

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Vol. 08/08

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THE UPLEDGER INSTITUTE, INC.

1-800-233-5880

(561) 622-4334

Or click:

www.upledger.com

Welcome! This manual has been prepared to facilitate your professional and financial success as a presenter, educator and spokesperson. Here you'll find the tools to organize, promote and present a successful Upledger Institute (UI) workshop.

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Speaker Qualifications

Thank you for your interest in becoming a presenter for The Upledger Institute. We truly appreciate your desire to promote your practice, the modalities and Institute itself.

You must notify the Business Development Department of all speaking engagements or workshops you schedule. Simply complete the Class Addition & Speaking Engagement Form (in Forms section) and send it by fax, mail or e-mail. Every speaking engagement and workshop you hold will be entered into our system, allowing for a permanent record of your work.

1. CranioSacral Therapy (CST) Speaker

As an Upledger alumnus you may seek out and/or accept invitations from local organizations, support groups and schools to present information on CranioSacral Therapy (CST). These speaking engagements are generally from one to four hours in length.

Qualifications to become a one to four hour CST presenter:

- Completion of CSI.

You are required to notify UI of all speaking engagements at least two weeks in advance for maximum support and preparation.

Outlines for one to four hour speaking engagements are available for qualified speakers. Please click on Outlines in the drop down menu to the left.

2. ShareCare® (SC) Presenter

ShareCare® is a six-hour, hands-on workshop designed to teach laypeople simple CranioSacral Therapy techniques they can perform on themselves or loved ones.

Qualifications to become a ShareCare® presenter:

- The successful completion of two (2) CSI teaching-assistant assignments with a score of 4.5 or higher within the past three (3) years.
- Completion of CSI, CSII and SERI.
- A recommendation from a UI CST instructor.

Study guides for SC must be purchased through our Educational Services Department at 1-800-233-5880 or www.upledger.com.

3. CranioSacral Therapy Overview (CSTO) Presenter

CSTO is a six-hour hands-on workshop designed for a professional healthcare audience.

Qualifications to become a CSTO presenter:

- The successful completion of two (2) CSI teaching-assistant assignments with a score of 4.5 or higher within the past three (3) years.
- Completion of CSI, CSII and SERI.
- A recommendation from a UI CST instructor.
- Submission of a video to our Business Development Department:
 - The video should be between 10 and 15 minutes in length.
 - The video must show you performing a still-point induction, palpation and diaphragm release.
 - You must use a demo body on a table while explaining your hand placements as if speaking to an audience that has not heard of CST.
 - The video will be reviewed by a UI staff clinician for techniques, accuracy, and presentation skill.

Study guides for CSTO must be purchased through our Educational Services Department at 1-800-233-5880 or www.upledger.com.

4. CST Certified Presenter Program

To become a CST Certified Presenter you are required to successfully complete the CST Tutorial Workshop. This four-day, small-group tutorial is designed to bolster your confidence and skills in presenting CST workshops. Led by a certified CST instructor, the tutorial offers you invaluable opportunities to practice your presentation skills. Once you become certified, you are eligible to speak at events or conventions on behalf of UI which could generate extra revenue and exposure for you and your practice.

In addition to building confidence, there are many benefits to taking this tutorial:

- You'll be among the first we turn to when scheduling workshops and speaking engagements.
- You'll receive a 25% discount on CST study guides.
- If you want to become a CranioSacral Therapy I instructor, this experience may count toward your certification requirements.

To register for the CST Tutorial Workshop, call our Educational Services Department at 1-800-233-5880. Class size is limited.

5. Lymph Drainage Therapy (LDT) Speaker

LDT presentations range from one up to three hours in length.

In any presentation under three hours you may demonstrate LDT techniques, but not teach these techniques to students.

Qualifications to become a one to three hour LDT presenter:

- Completion of LDT 1 and LDT 2.

6. Lymph Drainage Therapy Overview (LDTO) Presenter

LDTO is a three to six hour hands-on workshop designed for a professional healthcare audience. In LDTO you may demonstrate *and* teach LDT techniques to students.

Qualifications to become a LDTO presenter:

- Completion of LDT 1, LDT 2 and LDT 3
- Completion of two (2) LDT 1 teaching-assistant assignments with a score of 4.5 or higher.
- A recommendation from a UI LDT instructor.
- Submission of a three (3) hour videotape of you presenting a LDT demonstration to a group or class. The video will be reviewed by Dr. Bruno Chikly, developer of LDT, for approval.

Study guides for LDTO must be purchased through our Educational Services Department at 1-800-233-5880 or www.upledger.com.

7. Healing From the Core Overview (HFCO) Certified Presenter

HFCO certified presenters are individuals who have demonstrated a thorough understanding of Healing From the Core both conceptually and experientially in a way that embodies the HFC curriculum. Once a person becomes a certified presenter, they may teach the Healing From the Core Overview. These overview presentations can vary from a one-hour preview session to a full day overview at a convention to a two-day college credit course. A certified presenter is encouraged to follow established formats, as well as develop new ways to bring this material out to their community and the world.

Qualifications to become a HFCO certified presenter:

- Successfully attend all workshops in curriculum, including HFCC, HFRR, HFTR, HFEP, and AEDA.
- Submit application to the Healing From the Core office along with \$200 application fee.
- Successfully assist at two HFCC workshops.
- Approval by HFC Instructor to enter Certified Presenter training track.
- Successfully attend the post-AEDA HFC Tutorial, which provides instruction in the Five Principles, Opening Awareness and Ground and Fill Exercises.
- Successful creation and presentation of a Five Principles presentation to a group. Success is determined by, but not limited to: presentation skills, knowledge, clarity of examples, and organization.
- Develop an Opening Awareness and Ground and Fill Exercise and present it to a group. Presentation must show the ability to guide others through the exercise while demonstrating your own ability to embody the teachings and track another. Passing Grade 95%.
- Written certification by Suzanne Scurlock-Durana.

Study guides for HFCO must be purchased through our Educational Services Department at 1-800-233-5880 or www.upledger.com.

Workshop Tips

Overview Workshop Options

Upledger workshops are designed to allow you to make a profit while promoting valuable complementary therapies as well as your own practice. They're especially attractive to presenters from a business perspective because of the flexibility and profit potential. They're also designed to encourage healthcare professionals participating in your class to attend the four-day entry level 1 workshops.

Here are just a few of the advantages of presenting an overview workshop:

- You keep the revenues after the cost of the study guides, facilitator package and shipping (and UI registration processing fees, should you choose that option).
- You choose the location, dates and times.
- You choose the tuition amount with UI recommendation.
- UI provides the course content.
- UI will assist you with promotions, registrations and confirmations for a percentage of the tuition processed on your behalf. (This service is optional.)
- UI will make its line of products available for sale at the class if you wish. You'll be established as an official distributor so you can share in the profits from all products you sell.

Workshop Organization

Now that you're interested in presenting a workshop, here are some items to consider:

Selecting a Date

Before selecting a date for your workshop you should check the UI class schedule for your city. CSTOs scheduled before a CranioSacral Therapy I class may enhance both your registrations and UI's. UI may offer participants in your class discounts for CranioSacral Therapy I classes. (See Discounts section for more information.)

Avoid selecting dates that are on or near major holidays. Also, it is a good idea to check your city's events calendar to avoid choosing dates that overlap with popular local festivities.

Selecting a Location

The location of your class is very important. It needs to be convenient, comfortable and affordable. Try to secure a free location — at a healthcare school, church or office. If possible, barter a free registration for the use of classroom space. Your profit depends upon your costs, so try to keep this one low.

The space of the classroom is also important. The room must have approximately 500 square feet for every 10 participants. Decide how many participants you want to attend your workshop, setting this number above your break-even point. This goal accomplishes two things: 1) It gives you a target number to work toward, and 2) it allows you to plan your space accordingly.

Massage Tables/Air Mats/Chairs

Either massage tables or banquet tables (6 ft. x 30 in.) with air mats can be used in class. Massage tables are preferred. (UI recommends two chairs and two people per table.)

You may borrow air mats from UI at no charge but you will be responsible for shipping costs both to and from the class. Keep in mind that air mats are heavy and shipping can be expensive. Call all your friends and colleagues and borrow massage tables if necessary, or ask participants to bring their own tables (always have a few extra tables for those who do not bring their own if you choose this option). Again, try to keep your costs low.

Teaching Assistants

You may need teaching assistants (TAs) to help you provide a professional class. UI's recommended ratio is 1 TA for every 10 participants. UI will pay qualified UI TAs a \$25 tuition voucher per day. You may also ask trusted colleagues, who have at least completed a CST I class, to assist you and UI will give them a voucher.

Tuition

You set the tuition for your class. UI recommends:

- \$50 - \$75 per person for SC and \$125 for CSTO, LDTO and HFCO classes*

Keep in mind the cost of purchasing study guides when you select the tuition. Also, keep the tuition within a reasonable amount for your geographic area. Remember, after expenses (and taxes in some areas), all tuition collected is yours to keep.

*Students may be eligible for a discounted tuition to one of our entry-level classes after completing your overview class. Please see the section on Discounts in this manual for more information.

Registrations

You have three registration choices:

1. You handle all registrations and promotions.
2. UI handles all registrations and promotes classes on our Quick Course Finder (if class information is provided at least 12 weeks in advance – additional marketing efforts on your part are still encouraged).
3. Both you and UI take registrations and UI promotes classes on our Quick Course Finder (if class information is provided at least 12 weeks in advance – additional marketing efforts on your part are still encouraged).

It may be convenient for you to use UI's established registration system. We accept all major credit cards and send confirmation letters to participants who register through UI.

UI charges a 12.5% registration fee for any UI registrations. You will be paid the registration fees due you (less 12.5%) after UI has received your final class roster.

PLEASE NOTE: UI must have your W-9 form (available at <http://www.irs.gov/pub/irs-pdf/fw9.pdf>) on file prior to issuing your check for registration funds.

Confirmation Letters

We highly recommend sending out confirmation letters as soon as you receive registrations. If you opt for UI to handle your registrations we will send a letter for every registration we take. If you are taking your own registrations, we have provided a sample confirmation letters under Forms for your convenience.

Study Guides

You must purchase UI study guides for each of your participants. SC, CSTO, LDTO and HFCO study guides are \$17.50* each.

Order your study guides from UI within two weeks of your class to ensure items are shipped in time. Since you may have late registrations, we recommend ordering a few extra study guides. Unused study guides can be returned to UI for a full refund (less shipping costs).

CST certified presenters receive a 25% discount on study guides. No other discounts apply on study guides.

*Study guide prices are subject to change without notice.

Class Roster

You must submit a class roster (names, professional titles, addresses and phone numbers and e-mail addresses of participants) 10 days before your workshop. The roster will be provided to you in the facilitator packet you will receive prior to the class and must be typed or neatly printed. A final roster must be submitted once the class is complete.

UI Products

As a presenter, you receive discounts on the purchase of UI products to sell at your workshops. For details, call our Educational Services Department toll-free at 1-800-233-5880.

Continuing Education Units

CEUs may be obtained for participants in SC, CSTO, LDTO and HFCO classes. If you are unsure of how to contact a licensing board, call UI at 1-800-233-5880 and ask for the CEU Coordinator.

UI is a Category A Provider for the National Certification Board for Therapeutic Massage and Bodywork #025785-00.

Facilitator Package

The Facilitator Package is a package of information that you receive approximately one week before your class. It contains nametags, evaluation forms, TA vouchers (if applicable), and a printed class roster/sign-in sheet.

- It is sent approximately one week before your class as a pdf file.
- If we mail it, there is a \$25 shipping fee within the continental U.S.
- You **MUST** return a copy of the final roster and evaluation forms to UI at the end of your class.
- If there are any changes to a person's name or title, or if you have late registrations, please send their corrected certificates to us and we will send you their new certificates.
- Mail your class packet to: The Upledger Institute, Inc., Attn: Business Development Department, 11211 Prosperity Farms Road, D-325, Palm Beach Gardens, FL 33410-3487.

Food and Beverages/Check-In Table

Consider serving a continental breakfast (on the first day only if class exceeds one day), but keep it simple. Always offer water throughout the day.

Use the printed roster as a sign-in sheet at the check-in table.

Promoting Your Class

Promoting your class is an important element of success. See the section on Workshop Advertising and Promotions for ideas, tools and instructions.

A Few Easy Steps to a Successful Workshop

At least four months before your workshop takes place...

- Notify UI. Do this by filling out the Class Addition & Speaking Engagement Form (under Forms section) and sending it in by fax, mail or e-mail to the Business Development Department at:

11211 Prosperity Farms Road, Suite D-325

Palm Beach Gardens, FL 33410

Fax: 561-622-4771

E-mail: speakers@upledger.com

- Implement promotions plan. (See Workshop Advertising and Promotions section.)
- Review your material. You'll have a Presenter's Manual, a study guide and an outline. Be prepared!
- Send a confirmation letter to everyone who registers with you (UI will handle this if you choose that option.)
- Post flyers throughout your community and add event to community calendars.
- Check with local newsletters and publications to find out when they would need to receive a press release to include your event in their publication.

Two weeks before your class...

- Submit registrant names, professional titles, addresses, phone numbers and e-mail addresses to UI. Do this by filling out the Registration Form (under Forms section) and sending it to Business Development by fax or e-mail (contact information is under UI Support Personnel section).
- Call UI's Educational Service Department at 1-800-233-5880 to order your study guides. Always specify the date and title of your class. Keep in mind, you will receive discounts on your study guides if you have successfully completed UI's CST Presenter Certification Tutorial Workshop.
- Mail flyers to people on your mailing list.

One week before your class...

- UI will send you the facilitator package.
- Send out press releases to local papers.

Less than one week before your class...

- If people register for your class after UI has sent the facilitator package, note additions or changes on your final roster. Once UI receives it we will send you certificates of attendance to sign and give/mail out to your participants.
- Review your information and prepare for your presentation.

The day of your class...

- Arrive early to set up.
- Hold a lively, interesting class!

After your class...

- Provide refunds for those who cancel their reservation prior to your class.
- Return the following to UI:
 - Completed sign-in roster

- Evaluation forms
- W-9 form (if applicable)
- ***Do this right away.*** Your participants will NOT be eligible for their tuition discount until UI receives your final sign-in roster (see Discounts section for more information).
- UI must process your paperwork and “close out” the class before paying the registration funds owed to you. This may take three to four weeks. Mail all material to: The Upledger Institute, Inc., Attn: Business Development, 11211 Prosperity Farms Road, D-325, Palm Beach Gardens, FL 33410-3487.

Advertising and Promotions

We highly encourage you to advertise and promote your class locally. There are flyers and press releases located in the Speaker's Resource section of our website at www.upledger.com. Please feel free to customize these materials with your own information.

Here are some additional promotional suggestions to consider, depending on your topic and target audience:

1. Insert a copy of your flyer in your organization's next direct-mail letter or newsletter.
2. Notify local professional associations of the upcoming workshop and request that the date be included in their newsletters or calendars. Supply them with a copy of your flyer and/or press release.
3. Attend association meetings and networking functions. Personally announce your workshop and distribute promotional material.
4. Post your flyer in area schools, hospitals and clinics.
5. Submit a press release to local papers, healthcare magazines and newsletters (contact them in advance for deadlines).
6. List your workshop under "continuing education" and/or "upcoming events" on your organization's website. Notify UI if you are interested in linking with our website.
7. Attend local support-group meetings.
8. Be a speaker at local support-group meetings to stimulate interest in your class.
9. Attend health fairs or other local events and offer free hands-on demonstrations. Hand out your class flyer. (Contact UI for free promotional literature.)
10. Emphasize the discounts UI offers to your class participants. (See Discounts section for details.)
11. Think of people or their caregivers who could benefit from learning the techniques you present. Inform them of your event.
12. ShareCare® classes are highly marketable to support groups: Autism, ADD and Fibromyalgia to name a few. Contact local hospitals for information on area support groups. Then call the group leader and tell him or her about ShareCare® and how it can benefit the group members. Prepare a Marketing-Call Kit and deliver it in person. Your clients are also good leads — perhaps they know of an organization that would be interested in a ShareCare® workshops. Indeed, your clients and those close to them could make a great ShareCare® class.
13. CSTO classes are wonderful for healthcare professionals. Take the time to get CEUs and then contact physical therapists, occupational therapists, speech and language pathologists, dentists and dental assistants, massage therapists and other professional bodyworkers. Look for schools teaching these types of students. Check hospitals, nursing homes, home-healthcare agencies and spas that employ bodyworkers.

Discounts

It is important to understand the discounts UI offers you and your class participants. They are a valuable promotional tool and revenue resource.

Workshop Discounts: UI will discount the tuition on a four-day entry-level workshop (such as CranioSacral Therapy I) based on the tuition you charge, but the discount cannot exceed \$125 for any workshops you hold. Participants have 30 days from the time they complete your workshop to register with UI — **but they don't have to choose a particular class date at that time.** You can offer the registration discount at the time of your class and submit the names of those interested to UI along with your final roster.

Canadian Discounts: Be aware that the Canadian discounts for SC, CSTO, LDTO and HFCO workshops will vary depending on the exchange rate.

Student Discounts: Please be aware that UI offers all students a 50% discount on most entry-level workshops. The UI student tuition discount **cannot** be combined with any other tuition discount **including the discount offer we make for your workshops.** You may need to clarify this in your advertising and with registrants.

Study Guide Discounts: The only discount that applies to study guides is a 25% savings for CST Certified Presenters. See the section on the UI Speaker's Bureau/CST Presenter Certification Program to learn more.

Presenting in Schools

Here are some helpful hints from presenter Michael McConnell, LMT, CST on negotiating presenter agreements with schools that sponsor educational workshops:

- Check into the possibility of offering a workshop to massage schools, physical therapy schools, occupational therapy schools, nursing schools and others in your area.
- Ask the school what the school/presenter split is — sometimes it is 40% for the school and 60% for the presenter. Find out specifically how they do it, then get all financial information up front and in writing.
- Remember, you have to have study guides for all the participants. So determine whether or not the school is compensating you for the study guide cost.
- Ask how the school plans to advertise the workshop. Does the staff do direct-mail letters, flyers, newsletters, e-mail blasts, event calendars, website links or ads? You will want the school to advertise heavily to ensure a full class and maximize the financial return for you.
- Ask if the school has enough tables.
- Make sure you have accurate Continuing Education (CE) information for the school. CE requirements vary from state to state and modality to modality.
- Presenters are responsible for sending in the Class Addition & Speaking Engagement Form (under Forms section) rosters and evaluations. This is not the school's responsibility. Remember, UI's contact is the presenter, not the school.

Tips For Successful Public Presenting

Selected from the Toastmaster International website (www.toastmasters.org).

Feeling some nervousness before a presentation is natural and healthy. It shows you care about doing well. But too much nervousness can be detrimental. Here's how you can control your stress level and make effective, memorable presentations:

1. **Know the room.** Be familiar with the place in which you will present. Arrive early, walk around the room, and practice using the microphone and any visual aids.
2. **Know the audience.** Greet some of the audience members as they arrive. It's easier to speak to a group of friends than a group of strangers.
3. **Know your material.** If you're not familiar with your material or you're uncomfortable with it, your nervousness will increase. Practice your presentation and revise it if necessary.
4. **Relax.** Ease tension by doing exercises.
5. **Visualize yourself giving your speech.** Imagine yourself speaking with your voice loud, clear and assured. When you visualize yourself as successful, you will be successful.
6. **Realize that people want you to succeed.** Audiences want you to be interesting, stimulating, informative and entertaining. They don't want you to fail.
7. **Don't apologize.** If you mention your nervousness or apologize for any problems you think you have with your presentation, you may be calling the audience's attention to something unnoticed. Keep silent.
8. **Concentrate on the message, not the medium.** Focus your attention away from your own anxieties and outward toward your message and audience. Your nervousness will dissipate.
9. **Turn nervousness into positive energy.** Harness your nervous energy and transform it into vitality and enthusiasm.
10. **Gain experience.** Experience builds confidence, which is the key to effective speaking.

List of Forms & Promotional Materials Available Online

All forms mentioned in this guide are available online at www.upledger.com under “Speaker’s Resources.” Though they are copyrighted by UI, you are welcome to reproduce them for UI workshops you have been approved to present.

Forms

- Class Addition & Speaking Engagement Form
 - All speakers/presenters will fill out the Presenter Information section on page 1.
 - If offering a ShareCare®, CSTO, LDTO or HFCO, please fill out the remainder of page 1.
 - If offering a 1 – 6 hour presentation only, please fill out page 2 after providing your Presenter Information.
- Registration Form
 - Please use this form to take registrations and track your attendee’s information.
 - It is your responsibility to download this form and provide the information to UI.
- W-9 Form (available at <http://www.irs.gov/pub/irs-pdf/fw9.pdf>)

Press Releases

- ShareCare® Press Release
- CSTO Press Release

Confirmation Letters

- ShareCare® Confirmation Letter
- CSTO Confirmation Letter
- LDTO Confirmation Letter
- HFCO Confirmation Letter

Flyers

Customizable flyers are available online free of charge. No password is necessary for download.

- ShareCare® Flyer
- CSTO Flyer

Speakers Outlines

Available online at www.upledger.com free of charge.
Password required and available to certified presenters.

- One-Hour CST Outline
- Two-Hour CST Outline
- Three-Hour CST Outline
- Four-Hour CST Outline
- ShareCare® Outline
- CST Overview Outline

UI Support Personnel

We are pleased to have you present with us. Please contact us for help with all your presenter needs.

Melinda Glasco
Business Development Director
Fax: 561-622-4771
1-800-233-5880, ext. 1315
melinda@upledger.com

Business Development Coordinator
Fax: 561-622-4771
1-800-233-5880
speakers@upledger.com

Kristen Bloom
CEU Coordinator
1-800-233-5880, ext. 1376
kristen@upleddger.com

Educational Services Department
To order study guides, products, and coordinate registrations, call us at:
(561) 622-4334 or 1-800-233-5880