Maximize the attendee response and gain appointments from your seminars

Just as a journey of a thousand miles begins with one step, seminar marketing's first step is a decision. This decision is to commit and stick with a long term solution to a long term problem: how to consistently produce a continuous flow of qualified prospects coming through your door!

It is difficult to get anyone to come to a seminar, even with a free dinner. The problem is that 25% are totally unqualified, 50% only came to get the free meal, leaving you 25% who have a real interest in solving a financial problem. Worse yet, attendees will forget 70% of what they hear one day after the seminar, 90% after three days and lose any emotional motivation to keep an appointment they might have booked at the meeting.

If you offer dinner, you will pay $500-$600 per booked appointment. If you hold a seminar at a library, even without supplying dinner, the cost will be near $200 including the venue and marketing expense. Even if you do a client event and are smart enough to incentivize them to bring guests, the cost per appointment could be $300-$400.

Here's how to maximize the attendee response and gain appointments from any seminar.

Collecting Evaluation Forms

- Once the presentation concludes, give guests a moment to fill out the evaluation sheet and discuss it with their significant other. After about2 minutes, the appointment person should go around the room and collect the sheets of anyone who is finished.
- Encourage EVERYONE to fill them out and do NOT let them put them aside or slip them under their chair or into their purse. Be FIRM but COURTEOUS. Let people know that you will be coming around again to help them schedule their appointment and answer any questions.

ALL evaluation forms should be collected BEFORE the first course is served, so make sure you have properly communicated this to the restaurant staff to avoid premature food service.

Evaluating Response

Once you have the evaluation forms and guests are enjoying their salads/first course, QUICKLY go through to get an idea of the level of interest. You want to be sure you work fast enough to get around to EVERYONE and do not miss out on ANY potential appointments.
It will depend on the size of the group, but based on preferred dates & times, you can start to block off the calendar you brought so you have a few specific dates & times to offer prospects. You can write 2 times slots on each evaluation form to offer them when you go back around. **While the guests are enjoying their salads, the ADVISOR should go around the room & briefly introduce himself/herself and chat with prospects.

Scheduling Appointments

✷ THIS IS WHY YOU ARE HERE!!

You must work QUICKLY and EFFICIENTLY while still being PERSONABLE and conveying that you CARE about each individual. Once guests start to finish their salads/first course, go around the room with the calendar & a few Retire Now kits and start to schedule appointments. START with prospects who seemed particularly engaged/ interested during the presentation and when you collect evaluation forms. You want other people to see other guests scheduling appointments so they will follow!

ENCOURAGE prospects that your firm has experience with clients in similar situations to theirs. People like to tell their story. While you don't want to spend too much time on any one person, reassure them that they have good and valid questions, which your firm has dealt with and advised people on.

ADDRESS guests by name – you have it right in front of you on the form! This helps to build a good rapport while you move quickly around the room.

DOUBLE CHECK with EVERYONE about whether they would like to schedule an appointment. This does NOT mean harass or make them uncomfortable. Rather, don't ignore someone simply because they checked "No" on the evaluation form. We have found that some people may just have a question/concern preventing them from marking "Yes" and if you ask, they may say, "Well actually, I was wondering…"

This gives you an opportunity to give them a brief answer, but tell them you can go over it in more detail when they come in. You may also find that some prospects have changed their mind and would like to make an appointment after all, after speaking with the advisor at their table.

BE POSITIVE, POLITE and PROFESSIONAL. Other prospects are watching you as you go around the room and seeing how you interact – both with engaged and uninterested guests. This gives them an impression of your company and a glimpse of how you do business.

The SUCCESS of your seminar will stem from this part of the event – without prospects booking and keeping appointments, you will not be holding seminars for very long!

As you schedule appointments, briefly go over what you hand out including the office location, what they should bring, and what to expect.

VERY CRITICAL – You need to work FAST in order to make it to every prospect who is INTERESTED. Therefore, you cannot get caught up in a detailed conversation and if you need to cut it short be firm, but POLITE, saying something like, "These are great questions, and we'll be happy to go over them in more detail when you come in, but for now I need to help other guests to schedule an appointment."

THEY WILL UNDERSTAND and it will show that your firm and your services are IN HIGH DEMAND

✷ Day After Follow up

Once you return to the office, you need to ORGANIZE and TRACK allof the information you obtained from the seminar.
Begin by entering all of the prospect data from the seminar attendees into your CRM system. This includes names, address, all contact phone numbers, email, birthdates, etc. EVERYTHING you have should be entered.
a) Prospects Who Scheduled Appointments
Put ALL scheduled appointments on the calendar and IMMEDIATELY email those prospects to THANK them for attending and CONFIRM their scheduled appointment. You should also include an electronic copy of the data form you want them to complete and bring to their 1st appointment. This email should address them by name and be PROFESSIONAL. You don't want them questioning (and thus canceling) their appointment! In addition, if they need

to reschedule, you will want to know ASAP to avoid large gaps in your calendar! You will then also mail them a 1st appointment letter about a week in advance of their scheduled appointment. This should include directions to your office, another copy of the data form, as well as a reminder of what items to bring with them to the meeting.

VERY CRITICAL – The most important work for a seminar is done after the event – following up on appointments! NEVER just let them fall off the calendar!! They took the time to join you at the seminar and expressed interest, so some part of them knows that they would benefit from your expertise and assistance.