

# YOUR GUIDE TO SEMINAR SELLING

BUILDING AND ENHANCING CLIENT RELATIONSHIPS  
THROUGH EDUCATIONAL SEMINARS



 **Wealth Building  
Cornerstones™**

Whether a new or experienced financial professional, engaging with new and existing clients holds the key to expanding your practice.

Unlike most other forms of marketing or advertising, seminars offer access to an audience of qualified prospects for between 30 minutes and an hour. During this period of time, you have the unique ability to provide every attendee the opportunity to decide if they value the information you've presented and if it's aligned with their financial goals. In addition, you have the chance to convey a level of likability and trust necessary before any business takes place.

**Learn more about getting started  
with seminars today!**

# The Seminar Planning Timeline

A key to having a successful seminar is advance planning. Following a defined process to prepare for a seminar will allow you time to address any unexpected pitfalls that might impact your event. Use the

following timeline and steps to guide you through the process of planning and executing a successful seminar. Once you get comfortable with these steps, you can reevaluate the time needed for future events.

## Planning Steps

6–8 weeks  
*before* seminar

**Step 1:** Determine your target market

**Step 2:** Develop your invitee list

**Step 3:** Choose date, time and location

4–6 weeks  
*before* seminar

**Step 4:** Order seminar supplies and materials

4 weeks  
*before* seminar

**Step 5:** Send invites and promote the seminar

1–2 weeks  
*before* seminar

**Step 6:** Reach out with reminders

**Step 7:** Confirm seminar details

★  
day of  
seminar

**Step 8:** Seminar day activities

1  
within one week  
*after* seminar

**Step 9:** Follow-up with attendees

1–2 weeks  
*after* seminar

**Step 10:** Evaluate your results

## Step 1: Determine Your Target Market

Think about who would benefit most from and be interested in your presentation. With regard to Wealth Building Cornerstones, your most likely audiences will be individuals and business owners in pre-retirement (ages 25-64) or retirement (65+), both looking for ways to protect and maximize their retirement income. Understanding your target market will help you determine the timing and location of your event.

### TIP

Remember, you would like to establish a personal relationship with these individuals as a result of the seminar interaction. Be careful not to invite too many people to the seminar, which might make connecting on a personal level challenging.

## Step 2: Develop your invitee list

Consider the following groups as you develop your invitee list:

- **Prospective clients:** Individuals that you've identified through your various prospecting efforts and opportunities
- **Current clients that you would like to “clone”:** Invite current clients and also ask them to bring a friend. Accessing the networks of your clients is key in getting referrals to other ideal prospects that you might want to get to know
- **Potential strategic partners:** As you look for opportunities to expand the reach of your seminars, you might consider giving a seminar for centers of influence, like attorneys and CPAs, all of which could act as referral sources to grow your business in the future

### Step 3: Choose time, date and location

There are three major considerations in determining the best date, time and location for your seminar:

1. Budget
2. Timing
3. Location

#### *Budget*

Start making a budget plan for your seminar by determining how much money you have to spend on it. Determine the overall cost of the event by making a list of the items needed to hold the seminar. Include costs such as:

- facility rental (if necessary)
- audio-visual equipment rental (if you do not own or the facility does not make available)
- table/chair rental
- seminar materials, handouts and any pens or promotional materials
- attendee food and refreshments

Make sure you budget with return on investment in mind. Estimate how many sales will be required to cover the cost of the seminar. You'll compare that number to actual sales at the end of this process and decide if seminars are something you'd like to consider as part of your future marketing mix.

#### *Timing*

It's important to align the timing of your seminar with the type of audience you're working to draw. If you're planning to work with retirees, consider a daytime seminar with a light fare (possibly a continental breakfast) to appeal to this audience. Similarly, if you'd like to attract pre-retirees that are working 9-5 daily, evenings and weekend seminar options (with a full meal, refreshments and dessert) are likely to provide your best opportunity to drive attendance.

#### **TIP**

Remember to be considerate of holidays, school breaks and other events that might conflict with your clients' schedules. Choose a time that best reflects a fit for your intended invitee list.

## *Location*

Your budget will tell you a lot about the type of location you can and should reserve for your seminar. Ask yourself the following questions to help determine the best location to align with your budget and for seminar success:

- How many individuals do you plan to invite? This is an important consideration for room size, as well as food/refreshment expense.
- Will the location be private and quiet enough to support the success of my event?
- What type of food and drink will I serve?
- Does the location include tables and chairs for attendees? Keep in mind, attendees will likely want to take notes during your presentation, so having tables is an important consideration.

- Does the location offer technology services, such as a projector, screen and audio? Since you will be using a PowerPoint presentation during your seminar, you will need to figure in equipment costs if not provided by the location.

Based on the areas and communities in which you work, make sure you choose a location that is convenient to your target audiences. Consider factors such as prospective client drive time, distance, traffic and parking when selecting a seminar location.

Putting all these things together will give you guidance on the best time and place for your seminar. Remember to reserve space at least six to eight weeks in advance of your event.

## **Preparation Tips**

As soon as seminar invites are sent and promotion begins, begin familiarizing yourself with the seminar presentation. With careful preparation, a great PowerPoint presentation is definitely within your reach.

Rehearse your presentation in front of a mirror...rehearse in front of your peers or others that are familiar with the seminar. Get to know the sound of your voice and identify when you talk too fast, say “um” and “uh”, use excessive hand movements or slouch. Know your slides as well as the

#### **Step 4: Order seminar supplies and materials**

Once you've determined the location of your event and have a finalized invitee list, order the appropriate seminar materials through your normal channels.

Consider items such as:

- Paper and electronic invitations
- Workbooks
- Seminar sign-in sheet
- Evaluation forms
- Referral cards
- Thank you cards

This is a great time to make sure that you have other giveaways such as pens, promotional items and business cards available for the seminar as well.

#### **Step 5: Send invites and promote the seminar**

Based on the size of your invitee list, you have various invite options. For smaller seminars, consider calling select individuals to build your attendee list. When planning larger seminars, send mail and/or e-card invitations at least four weeks in advance of the event and have a clear RSVP method noted in the invitation.

If the event is taking place at a familiar community location, you might even consider local newspaper or poster advertising to expand the reach of the seminar.

timing of the presentation inside and out, and be prepared to address any questions your audience might have.

**Remember, this is the first impression you'll make with many attendees – let your expertise, knowledge and personality shine through!**

### **Step 6: Reach out with reminder**

If possible, consider reaching out to seminar participants to confirm their attendance. This will emphasize how much you're looking forward to seeing them and help you to solidify final meal or refreshment counts for your venue.

### **Step 7: Confirm seminar details**

A week prior to the event, touch base with the contact at your event venue on the date and time of your seminar, as well as any meal or refreshment requests you have made.

### **Step 8: Seminar day activities**

To help ensure a smooth seminar experience for your attendees, it's important to

- Arrive early to check the venue, make sure the room is set up as you desire and confirm that A/V equipment is running properly prior to the arrival of your attendees
- Consider putting up signs to direct attendees to the correct meeting room
- On a table near the entrance, set out a sign-in sheet, workbooks and any other collateral/ giveaways and business cards so

that attendees can pick them up on their way into the seminar

- Welcome attendees and point them to any refreshments prior to the seminar's beginning
- Deliver your presentation and answer any questions received during the presentation and afterwards
- Distribute evaluation sheets and referral cards, and ask to collect them as individuals depart the seminar
- Once your presentation is complete, thank individuals for coming and "mingle" with your attendees
- Have business cards, your schedule and appointment cards ready in case individuals are ready to proceed with an individual discussion to learn more about Wealth Building Cornerstones and its application as part of their retirement strategy



**Step 9: Follow-up with attendees**

The objective of any seminar is to generate interest in meeting with you one-on-one at a later date. For the most part, you could know at the end of your seminar which attendees have interest in moving forward to a future meeting based on their evaluation response or a personal conversation. Either way, it's important to reach out to all seminar attendees, thank them for attending and extend the opportunity to learn more about Wealth Building Cornerstone at their convenience in the future.

This follow-up can take place via phone call, a thank you card or e-mail. Two days after the seminar is a reasonable time to begin follow up, not painting you as overanxious but interested. However, the longer you wait beyond two days, the colder the prospect may become.

**Step 10: Evaluate your results**

As a final step in the seminar process, it's important to assess the success of your recent seminar. Look at the amount of time and money you spent to plan and execute the seminar.

Then, consider:

- the number of seminar attendees
- feedback you received from the presentation
- the number of initial appointments or referrals you received from the seminar; and
- if applicable, any sales that came from seminar attendees

Take this information into account as you weigh the opportunity to hold other seminars and improve your approach, presentation and follow-up skills for the future.

Seminars offer you an opportunity to educate individuals about the work that you do and build or enhance relationships with new and prospective clients. As you work to grow your practice daily, seminar selling can position you as an educated, trustworthy individual to those seeking assistance with their financial strategies.

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