



SUCCESSFUL SEMINAR STEPS

Seminars are still good marketing tools and a way to add value to your clients, but it takes more effort up front than it took 3 years ago to run a successful seminar. Attendees are looking for value and they pay attention to details. Therefore so should you. Make the most from your marketing dollars. The seminar can be a good cost-effective tool when care is taken in its preparation.

There are common elements to every successful seminar. The effect of local media increases the effectiveness of your seminar and enhances the position your firm has. The following guidelines will help you organize and achieve the best results.

WHAT TYPE OF SEMINAR/PRESENTATION?

- Client Appreciation/Prospecting
- Open Public (prospecting)
- Professional Development

Idea: If you are a financial advisor, look into co-op sponsorship from mutual fund companies.

Many are interested in assisting in educational/prospecting seminars, but be aware of the limits under the sales code rules. Send a written proposal to your desired sponsors, which must include seminar purpose, speaker's outline, proposed budget and how you intend to promote the seminar.

BUDGET

Before you decide to hold a seminar, make a list and compare prices before you finalize and commit to a location and a date. Below is a list of items for you to consider for a seminar with 200 attendees.

Speaker:	Speaking fee	_____
	Travel	_____
	Accommodation	_____
Location:	Room rental	_____
	Catering	_____
	Audio visual rental	_____
Newspaper Advertising:		
	Size and frequency	_____
Paper & Printing for flyers/invitations:		

Stamps and envelopes for mailing:		

Handouts:	Folders and inserts	_____
Other:	_____	_____
TOTAL (plus all applicable taxes):		_____

LOCATION

Make sure the location can service the anticipated number of guests and can provide alternatives (i.e. larger rooms, increased food/beverages) if necessary. We have found that seminars are more successful in the following atmospheres:

- Hotel (well-know, reputable)
- Golf & Country Club
- Art Gallery

- Remember:
1. To book the audio-visual equipment your speaker requires (i.e. data projector or slide projector, screen and microphone)
 2. To have directional signs within your location guiding people to the room, especially if there is more than one entrance.

Idea: Soft music playing (i.e. classical) prior to and after the presentation is an excellent way to create a calm and inviting atmosphere for your guests.

PARKING

If free parking is not provided for your guests, the following etiquette usually applies:

- Client appreciation - host pays for parking.
- Open public - guests are responsible for parking.
- Professional Development - either guests or host.

DATE

Remember who your audience is. Watch out for summer/winter vacations, special holidays, observances, sporting events and long weekends!

PRE-SEMINAR QUESTIONNAIRE

Many professional speakers send out a pre-seminar questionnaire for you to complete. Your answers will help the speaker to prepare and customize the seminar with issues that most interest you and your audience.

CONTRACT AND DEPOSIT

When you receive the contract for the speaker, review, sign and return with the deposit as quickly as possible. This assures the speaker that you are committed to the event. Note: Don't assume you can video or audio-tape the presentation. Ask first.

HOTEL AND TRAVEL ARRANGEMENTS

If you are booking a speaker from out of town, you will usually be responsible for the cost and arrangement of their travel and hotel accommodations. Ask if the speaker has any preferences such as a food/room.

MEDIA

When planning a public seminar, consider the use of your local media to promote your event. If the speaker is well known, having a radio/television/article in your local media before the event can increase awareness and interest. Fax a "press release" cover sheet from the host of the seminar with a biography of the speaker to local radio, TV and newspapers has the potential for quick interviews and write-ups on the event. You could even arrange for the local media to come to the event, if it is appropriate. Ask if the speaker is available to come earlier to promote the event with local media. Example of a press release:

"For Immediate Release - One night only! SPEAKER, author of NAME OF BOOK will be in TOWN on DATE at LOCATION at TIME. Hosted by NAME OF HOST. If you would like to book a short interview by phone/in person with SPEAKER, please contact SPEAKER'S NUMBER."

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For more information: Host name and contact information.

INVITATIONS, FLYERS, ADS

Advertising should always reflect the audience you want to attract. You should receive a speakers kit (usually includes: biography and recent information on speaker), samples of previous seminar advertising and a photograph of the speaker to use for your seminar. If you are planning on advertising in the newspaper, review your target audience and check with the newspaper for statistics on readership and content throughout the week to determine which are the best days to run your advertisements. The following is a list of different ways that have been used to advertise and invite people to seminars.

For client appreciation/prospecting seminars:

- Flyer with a covering letter
- Classic invitations (i.e. wedding or business card style)

Open public seminars:

- Newspaper ads
- Selective invitations to local businesses/professionals to increase your centre of influence.

Professional development:

- Flyer/Company announcement
- Classic invitations

Remember: Clear, concise wording with simplicity of design makes the best ads/invitations.

Important: If you are a financial professional, make sure you have your ads/invites approved by your compliance department, the mutual fund company sponsors and the speaker/speaker's bureau prior to production.

REGISTRATION

Most seminars have an RSVP phone number and extension on the invitations or ad. Allow people to register by fax and the Internet, if you have a web site and/or e-mail address. Try to phone people who leave messages within 24 hours, to confirm their seats. Also, confirming everyone's attendance a day or two before the seminar is not only a friendly gesture to your guests -- it usually ensures higher attendance.

Remember: Send the speaker detailed directions to the seminar location plus a schedule (with directions) to any media events, if applicable.

SEATING ARRANGEMENTS

Both theatre and half-round table seating arrangements are appropriate for seminars. We have found that most people prefer half-rounds because it is more comfortable and allows them to use the table to take notes and provides a place for their refreshments.

CATERING

The following is a guideline for catering, depending on the type of seminar you would like. Remember to confirm with the caterer, 24 to 48 hours in advance on the number of persons attending.

Client appreciation/prospecting:

Many people serve a wine, cheese, fruit and vegetable platters and/or dessert buffet with coffee/tea. Any combination is pleasant. Consider coffee/tea prior to presentation, with the food and wine served after.

Open public:

Coffee/tea are usually sufficient. If the seminar is early in the morning, muffins are a nice touch.

Professional development:

If the seminar starts early in the morning or runs through lunch hour, a light meal (muffins, sandwiches, fruit, coffee/tea) is a professional touch.

HANDOUTS

Ask if the speaker has any relevant materials relating to the seminar topic available to use.

Client appreciation/prospecting seminars:

Most clients are coming for the educational value, but they do not want to be weighted down with unnecessary paper. Let your clients/ prospects know that if they are interested in receiving more information you would be happy to send it to them.

Open public:

If you are a financial advisor, creating a package, which includes your business card, your biography and information on your company along with relevant seminar information will introduce you to the audience. Make the audience aware that you are the sponsor of the event and would be happy to assist with any questions or concerns they may have. Remember to include a seminar response sheet.

Professional development:

Industry professionals usually like a package that includes the outline with room to write notes. Remember to include a seminar response sheet.

BOOKS

If the speaker is an author with a book relevant to the subject, ask about special discounts on books. Usually they can be purchased for the attendees prior to the seminar, available at a special seminar price for the attendees the day of the seminar or after the seminar.

PRIOR TO THE SEMINAR

A day or two prior to the seminar, contact:

- Speaker (do they have directions, tickets, accommodations, etc.)
- Location (confirm numbers, check catering, audiovisuals and room set-up)

Check:

- Handouts (enough packages, seminar rating sheets)
- Attendance list (make sure you have more than one copy).

DAY OF SEMINAR

Go through your seminar checklist one last time to make sure you haven't forgotten anything. Try and arrive at least sixty minutes prior to the beginning of the seminar to introduce yourself to the speaker and to make sure everything is set-up correctly. Rather than setting out too many chairs, it is better to set up the room for the number you expect and to add more chairs if necessary.

Remember: Make sure the registration desk is adequately staffed and always be a gracious host.

AFTER THE SUCCESSFUL SEMINAR

It is important to complete the seminar with the following:

- Follow-up with attendees!!!** Open a dialogue about the topic with clients and prospects.
- Follow-up with those who expressed interest but were unable to attend. Make the seminar handouts available to your clients and prospects.
- Full payment sent to speaker
- Receipts sent to sponsor to receive payment (if applicable)
- Full payment for location, food, printing costs, etc.

Idea: Send a press release with a photo of the speaker from the event, indicating that they were in town. Include some key ideas from the seminar and include the sponsor's name.