

Seminar Event Planning Guide



LeadingResponse

BETTER PROSPECTS. BETTER RESULTS.

**How to Maximize
the Success of Your Seminar Events**

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Overview

About Us



LeadingResponse® is a national lead generation and client acquisition marketing firm. For over 24 years, we have successfully adapted to an ever-changing business world. As proud of our history as we are, we are even more excited about the future. To unify our brand, we've brought RME360 and Resource Solutions together under the LeadingResponse name. Our clients can expect the same high-quality digital lead generation, prospecting, seminar programs and customer service. So can you.

This is how we do it:

First, we segment our services into three areas: marketing, software & technology, and expert consulting.

Second, we use tactics that best apply to your business, to provide high-quality leads quickly.

Even better, we do all this at the lowest possible cost.

Our Solutions



Our marketing solutions offer a comprehensive design for the complete marketing cycle:

- Planning
- Programs
- Preparation
- Integration
- Execution
- Results

Results Focused Solutions:

- Seminar Event Marketing
- One-on-One Appointments
- Digital Marketing
 - Social Media Marketing – Seminar Connect™ and Facebook Boost
 - Direct Digital Dispatch
- Data Services
- Creative Services and Copyrighting
- Professional Services

Seminar Success®

Our flagship program, Seminar Success®, is responsible for marketing more than 1,000,000 seminar events and generating more than 20 million seminar responders for more than 7,000 different companies nationwide since 1995. This social dinner event concept offers the consumer population a comfortable environment for which to research and make financial decisions. Seminar Success® has become one of the most effective event marketing programs of its kind and has been used in a variety of markets including: financial services, insurance, Medicare Advantage, healthcare, banking, mortgage, franchise development, travel, chiropractic, Lasik, and more.

Best Practices Consulting Services

Our Marketing Consultants provide individual representative level consulting. This initial consultation includes, but is not limited to: representative's background and experience; demographics of their customer base and ideal prospects; past marketing efforts – successes and failures; marketing budget; client acquisition goals – both short and long term; Neighborhood Market Research report; and assistance in helping develop a marketing strategy. The consulting process continues with post campaign analysis and strategic adjustments as needed.

LeadingResponse® Consulting Includes:

- Direction and best practices based on statistical correlations derived from more than 700 monthly seminar campaigns and more than 250,000 direct marketing programs.
- Content recommendations from our monthly "Top 25 performing topics" (the top 25 invitations from more than 700 monthly campaigns)
- Venue recommendations from our proprietary RSVP/Restaurant database
- Geographic analysis of marketing area (estimated drive time analysis, radius/ring study, etc.)
- Demographic targeting based upon the advisor's services
- Process, expectations and campaign timing

Getting Started

We recommend your initial contact with LeadingResponse® be at least 40 days prior to your first anticipated event date. Upon initial contact, your LeadingResponse® marketing consultant will discuss the "Best Practices" for marketing your event series. You will find a quick reference guide later on in this document that outlines the methodology used in our test-marketing effort. You will need to be prepared to discuss the following logistical information regarding your seminar event campaign.

- Possible Restaurant Location(s)
- Potential Seminar Dates
- Target Audience / Demographics
- Proposed Marketing Material, Seminar Presentation, & Speaking Points
- Compliance Review Process (If Applicable)



WHERE to Host Your Events

Selecting Your Venue

There are several key factors that will affect the outcome of your marketing effort and that should be considered when determining your restaurant location(s). The ideal restaurant will meet the following key criteria:

- A free-standing restaurant is the best option.
- Try to avoid country clubs, hotels, wine bars/lofts, exclusive clubs, convention centers, office space and libraries. These venues have been shown to deliver inconsistent and sometimes disastrous results. If one of these options is necessary to support your market, a good idea is to also offer a restaurant venue to reduce your overall risk.
- Restaurant(s) should be within a 15-20 minute drive of seminar invitees.
- Restaurant(s) should be within your target geography.
- If your target area is broad, choose multiple locations to offer shorter travel times for your audience.
- Private or separate function rooms are suggested.
- Comfortable seating for between 30-50 people (Tables of 4, 6, or 8 – not classroom).
- U-shaped table setup is the best.
- Ample off-the-street parking.
- Select the restaurant with your target audience in mind.
- Entrances and layout should be easily assessable for your guests. Keep in mind age and possible handicaps. For example, do not select a venue where the function room is on the second floor if there is no elevator access.
- Simple dinner \$20-\$50 per person, including tax and gratuity is the average. Prices vary by market.
- Food choices should appeal to the masses – some suggestions are Steak Houses, Italian or American Food, and Seafood. Avoid ethnic restaurants or spicy cuisine.
- Schedule dinners for 6:30 pm and 4:30 pm.
- Consider functionality and presentation needs – AV hookups, accessible outlets, internet connections and audio to name a few.

Always visit the restaurant location(s) prior to your events to verify that your choice resembles the above criteria very closely and that the environment is conducive for seminars.



Negotiating with Restaurants

When dealing with the restaurant management, keep the following in mind: Each invitation will have their logo on it – that's a lot of free advertising! You are booking THREE or FOUR dinner seminars and if they make a good proposal, you'll hold all your seminars there! Remember, you can ALWAYS increase the number of dinners as your seminar dates fill up.

Some tips:

- Ask for better prices. You won't get them if you don't ask.
- Ask for lunch portions or reduced calorie (health conscious meals) instead of dinner portions. You may be able to reduce your total investment.
- Use restaurant competition to your advantage. The restaurant down the street is only going to charge...
- Avoid paying fixed charges or room minimums.
- Ask about family style servings and group discounts.
- Request substitutions for the main course, for example: Prime rib can be a less expensive alternative to steak.
- Calculate how much money you anticipate bringing them and show it to them. You can always go down the street to the next restaurant...
- Use your marketing as leverage. You are mailing to thousands of local households and providing market exposure for the restaurant as well.



Getting People to Attend

Identifying Your Target Market

You will be able to target your mailings by selecting the following criteria:

- Age
- Household Income
- Homeowner
- Geography (Zip Codes, Mile Radius, County, or Metropolitan Areas)
- Income Producing Assets (Additional Charge May Apply)
- Net Worth (Additional Charge May Apply)

Once this information is provided, LeadingResponse® will generate a market research report based on your criteria. The turnaround time for these counts is usually within 24hours of the request. These reports will be sent to you via email in an easy-to-read format. Your marketing consultant will help you calculate the total quantity that should be mailed in order for you to fill your events and meet your goals. It should be noted that this is not an exact science and marketing results vary. LeadingResponse® currently maintains a 94% fill-room-rate and should be able to provide you with an accurate estimate for your area. A general rule in determining the number of invitations that you should mail is approximately 7,500 to 10,000 invitations for every 100 people expected.

Choosing Your Event Days, Dates and Time

By choosing days, dates, and times that offer flexibility in scheduling, that are convenient, and don't conflict with the major Holidays, you can maximize both registrations and attendance. The following guidelines have historically yielded the most positive results:

- Tuesday and Thursday are the best days to host events. Wednesday is the next best day, however in some areas it may conflict with religious services.
- The recommended start times for your events are 6:30 pm and 4:30 pm. A minimum of two dates should begin at 6:30 pm and one to two dates should start at 4:30 pm.
- Dinner sessions have consistently out-performed lunch sessions by almost twice as many reservations.
- Consider major Holidays prior to scheduling your event dates. A good rule to follow is one week clear on either side of a major Holiday, i.e. Thanksgiving, Christmas or New Year's. Your LeadingResponse® consultant will help you avoid potentially damaging mail dates and

Copywriting and Invitation Design

LeadingResponse® offers invitation copywriting services and can create successful invitation content from your seminar presentation, talking points, current topics, or a specific product / service category. LeadingResponse® reviews more than 800 monthly seminar invitations and compiles the top 25 performing seminar letters each month. This material is used to identify market trends, popular topics and provide recommendations to you.

LeadingResponse® offers more than 50 different pre-designed seminar invitation designs. These packages have been developed to offer you a proven method of contacting and connecting you with new prospects. Each component is designed to connect with the target audience on an emotional and psychological level and plays a key role in generating action from your consumer audience. Should these pre-designed invitations not fit your company, LeadingResponse® can develop a custom design specifically for you.

Event RSVP, Registration and Tracking

We were the first event marketing company in the financial services industry to provide an in-house seminar reservation service and reporting portal – SeminarRSVP. There is no doubt that the success of every seminar campaign lies with giving your ideal prospects an easy way to reserve a seat at your event. That is why LeadingResponse® decided to invest in creating a proprietary seminar reservation service and responder management platform. Our seminar reservation service has dedicated call center agents who capture and record every reservation call, this gives financial advisors the ability to view and manage their event campaign reservations, leads and appointments in real-time, 24 hours/7 days a week. Our seminar reservation platform has no equal in the industry and includes many unique features, including:

- Mobile responsive
- Online Reservation landing pages
- Month or day at a glance – see all past and upcoming event dates
- Print and download your attendee roster and name tags
- Online, real-time RSVP reporting
- Responder reports available in PDF and Excel formats
- Real-time appointment setting
- Simple survey questions: All answers and comments are entered, collected, and available online
- Toll-free number
- Reminder calls

Follow-Up



Follow-up is crucial to your success. It is recommended that you place a courtesy call to each registrant prior to the seminar, introduce yourself, thank them for making the reservation, and remind them of your upcoming event. This will help you begin to build relationships with your attendees, as well as minimize your attendance drop-off rate. You should also contact your attendees one to two days after the event, thank them for attending, and attempt to schedule and in-office or in-home follow-up appointment.

Handling Facebook Responders – LeadingResponse® recommends that you try and create a connection with the prospect as soon possible. Traditional drop off rates for digital responders is 50%, but advisors have been able to increase the attendance rate by following the procedure listed below.

Facebook Follow Up Process:

1. Call to thank for making reservation within 12 to 24 hours or sooner.
2. Send a letter that covers the following information – Date and time reserved, what you will cover at the event, and directions to the location from their home.
3. Start confirmation process 48 hours before the event.

Market Insight Report



The first step in planning a successful seminar marketing campaign is to know exactly how many consumers match the advisor's ideal client profile. So, RME360 creates a comprehensive analysis of the advisor's geographic market area. This report includes:

- A population density map of your prospects
- A breakout, by zip code, of the number of prospects in your market
- Key demographic data about your market and prospects
- A list of best-performing seminar venues by accessing a proprietary database of more than 10,000 locations all across the country, all of which have been previously used for hosting events
- A strategic marketing plan based on your prospecting and sales goals

Our Process



1. Decide Type of Seminar:
 - Aging in Retirement
 - Three Phases of Retirement
 - Social Security
2. Provide zip code for Location of Seminar
3. Select Date for Seminar (7 Weeks Out)

Your Marketing Consultant will help you with the following steps:

- a) Generating an exact number of potential clients in the geographical area
- b) Design & Print proven invitations focused on your chosen seminar topic.
- c) Selecting your criteria for targeting clients in the area
(ex: age, estimated income, assets, net worth, dwelling type, ethnicity, etc.)
- d) Training on how to utilize the RSVP Portal to manage the event responders

Sample Invitations

Full View Wedding Style

The most formal and upscale of seminar invitations, the wedding style gives your seminar marketing a more personalized experience. It enhances the overall image of your firm's professionalism and expertise with prospective clients, while providing a greater amount of space to deliver a compelling marketing message. The full view envelope makes a lasting first impression, giving the piece a high-end feel.



Wedding Style Invite

The standard wedding style invitation package delivers the same high end feel and personalized touch as the full view wedding style package, but instead uses a custom printed envelope to deliver a more cost-effective solution.



Self-Mailer Invite Package

A self mailer is a single piece of folded paper that is sealed and then sent in the mail. Simply put, the mailer mails itself – there is no envelope involved. This type of invitation lowers production costs while also providing a larger area for messaging than is provided by a simple postcard.

Another benefit is that it does not require an envelope to be opened to view the message contained within the invitation. Self-Mailers are available in a variety of sizes including bi-fold and tri-fold formats.



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