

How to Make Your Seminars Successful

(Seminar Hosting Instructions)

If you haven't yet conducted a seminar, why not? The reasons that many people give for not attempting to hold a seminar are:

- ✓ **They are uncomfortable speaking to a crowd of people.**
- ✓ **They are unsure of where to start or what is involved in conducting a seminar.**

If you are uncomfortable speaking in front of a crowd, you are certainly not alone. Many who conduct seminars have experienced that same feeling. The only way to become comfortable with public speaking is to just go ahead and do it. Keep in mind that, to facilitate a successful seminar, you don't have to be a polished speaker. Your aim is to clearly and simply present information that you already know. By being sincere, direct, and most of all, by being yourself, you will achieve your goal.

If it helps, attend a seminar as an observer. Take notes of things you liked and things you didn't like. You may also want to consider training (e.g., Toastmasters) or role-playing with another agent prior to advertising your first seminar. Another way to get accustomed to speaking in front of people is to start off small with two or three couples rather than doing a full-blown seminar. It will be even easier (and probably more successful) if the attendees are people you already know, perhaps several business clients and their spouses. An alternative to speaking yourself is to have a guest speaker.

If the reason why you haven't tried a seminar is simply because you don't know where to start, this guide is geared to helping you develop a new sales lead source by providing information and materials you need to be successful. As you gain confidence in your ability to promote and conduct successful seminars, you should feel free to modify these guidelines to fit your personal style and unique needs.

By reading the information that follows, you will:

- Be equipped with a seminar checklist
- Know how to evaluate an off-site location for your seminar
- Be able to handle the pre-seminar preparation
- Have the ideas and tools for scheduling and promoting your seminar
- Learn how to conduct a successful seminar
- Understand how to conduct post seminar follow-up

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Checklist for Timing of Seminar Events

Here's a checklist and schedule to help you plan for your seminar. Remember that all sales and marketing material, including invitations, presentations, scripts, ads, handouts, etc., must be pre-approved by Marketing Review.

45 Days in Advance

- [] Select date, time and site location. (See Tips for Scheduling Your Seminar)
- [] Select invitations and assemble mailing list. (See Getting Attendees to Your Seminar)
- [] Make sure that your support person and guest speaker(s) will be available.
- [] Order any handout supplies that may be needed.

35 Days in Advance

- [] Complete site selection, sign contracts, etc.
- [] Schedule advertising date(s) with newspaper.
- [] Confirm mailing addresses.

20 Days in Advance

- [] Mail invitations with directions to site.

15 Days in Advance

- [] Review and practice the speaker's script. (See Preparations for a Professional Seminar)
- [] Start to call existing customers or nonattendees from prior seminars.
- [] Make calls to invitees who have not responded.
- [] Run first newspaper ad.

10 Days in Advance

- [] Call responders from first ad and mail *confirmations*.
- [] Run second newspaper ad.

7 Days in Advance

- [] Put together seminar handout packages. (See Preparations for a Professional Seminar)
- [] Call responders from second ad.

4 Days in Advance

- [] Hold practice presentation of the seminar.
- [] Finalize the refreshments order. (Please keep in mind that because state insurance anti-inducement laws limit or prohibit what can be provided to the public (e.g., promotional items, refreshments or modest meals) you must obtain pre-approval from your manager and Marketing Review.
- [] Monday through the day of the seminar – call to reconfirm seminar.

1 Day in Advance

- [] Test all equipment.

Day of Seminar

- [] Arrive early. (See Preparations for a Professional Seminar)
- [] Bring handouts, name tags, paper, pencils, business cards and appointment book.
- [] Pick up evaluation forms at conclusion of presentation (See Seminar Evaluation Form)

7 Days After the Seminar

- [] Make follow-up calls and set appointments. (See Post Seminar Follow-up)

Tips for Scheduling Your Seminar

Once you've decided to hold a seminar, you'll need to select the date, time and location for the event.

Date and Time: The right day and time can mean the difference between a well attended and a poorly attended seminar. Here are a few things to do and/or consider before committing to a date:

- **Date.** Industry experience has shown that Tuesday, Wednesday and Thursday tend to be the best days to hold a seminar.
 - ✓ Check the local community calendar and be sure that your seminar won't have to compete with a major local event (Founder's Day, high school graduation, etc.).
 - ✓ Avoid scheduling your seminar on the same day as a major sporting or entertainment event (Super Bowl, March Madness, etc.).
 - ✓ Don't schedule your seminar on a religious or ethnic holiday (Passover, Christmas, etc.).
- **Time.** When scheduling the time, consider the location. For example, if you are holding the seminar in a downtown area, your prospective attendees may be coming straight from their jobs. Under these conditions, a 6:00 PM or 6:30 PM session would likely draw more attendees than an 8:00 PM session.
 - ✓ Schedule time for a light reception to allow time to build rapport with the attendees.
 - ✓ Consider offering a choice of two different meeting times.

Location: In real estate sales they say, "Location is everything." The same is true with seminars. Spend time thinking about the best place to hold your seminar. Options include:

- **Your Office.** Your office will be the least expensive option; however, it may not be the best choice. Consider how your office shows. If your office is cluttered, cramped or in a congested area, pick another location.
- **Off-Site Location.** Start by surveying your targeted area and finding out where local business organizations hold their meetings. Colleges, libraries, hotels, private clubs, restaurants, golf courses, etc. can all be possible seminar locations. Features to look for in a location:
 - ✓ **Ease of accessibility & EEO concerns.** The facility and the room should be accessible to all. It must be free from any form of gender, religious and ethnic harassment.
 - ✓ **Size.** The room should be large enough to hold the number of attendees you are expecting.
 - ✓ **Cleanliness and attractiveness.** Ample and convenient parking is also important.
 - ✓ **Catering facilities.** Many facilities will not allow you to supply your own refreshments. It may be advantageous to negotiate your room rate and food services at the same time for better overall pricing. *Since state insurance anti-inducement laws limit or prohibit what can be provided to the public (e.g., promotional items, refreshments or modest meals) you must obtain pre-approval from your manager and Marketing Review.*
 - ✓ **Availability of equipment.** If you need equipment, determine whether it's available at the facility and its cost. Many facilities allow you to supply your own equipment.
 - ✓ **Comfort and ease.** Check for lighting controls and easy-to-access electrical outlets. Restrooms should be located close to the meeting room.
 - ✓ **Ample set-up and breakdown time.** Check to make sure there is time between meetings.
 - ✓ **Sound from neighboring rooms.** Make sure to check how much sound may filter through walls.

The *Off-Site Location Evaluator* (found on next page) will help you evaluate and record the information of the sites that you visit.

Off-Site Location Evaluator

Name of facility: _____

Location: _____

Name of contact: _____ E-mail: _____

Phone number: _____ Fax: _____

Approximate size of room: _____

Cost of room: \$ _____

Additional expenses: \$ _____

Total cost: \$ _____

SITE

Yes/ No

- Site is conveniently located with easy accessibility
- There is ample, free and convenient parking available
- Physically challenged "friendly" (e.g., ramps, designated and convenient parking)
- Site and local area is free from all gender, racial and ethnic "environmental" concerns.

ROOM

Yes/ No

- Easy to locate, away from areas of noise and distraction
- Large enough to accommodate attendees, guests and equipment
- Physically challenged "friendly" (first floor preferred, double doors, etc.)
- Independent climate controls (air conditioning & heating)
- Independent lighting controls (dimmer, side lights, zoned lighting)
- Clean and presentable
- Sound from other rooms controlled
- Restrooms are easily accessible
- Ample and convenient electrical outlets, extension cords
- Space for reception table outside of room

Description of Room Layout _____

SERVICE

Facility provides:

Yes/ No

- Clean tablecloths
- Water and glasses
- Paper and pencils
- Projection screen, microphone and other audio visual equipment (make note of any extra cost)
- Lectern, extra tables
- Light refreshments (make note of extra cost above)

OVERALL IMPRESSIONS

Copy as needed and retain completed form for future reference.

Getting Attendees to Your Seminar

Your seminar has been scheduled. Now comes an important part . . . inviting and attracting quality prospects. You need to promote your seminar. Even though we have made this part as convenient as possible by providing approved invitations and print ads, it does take time and effort to get people to your seminar. You'll need to plan your promotion activities well in advance of the seminar and carry them out. When it comes to promotional activities, all of the tips listed below will work ...if you do them.

Invitations:

- **People you know.** Start by inviting people you already know such as current clients, neighbors, members of organizations you belong to, etc. People who know you will always be more receptive than strangers. They are also more likely to refer others to you as potential seminar attendees.
- **Groups.** You may be able to arrange to give a seminar to a group, especially if you belong to a local group such as a church, a service club, Chamber of Commerce, etc.
- **Professional Alliances.** If you have a relationship with a bank, an accounting firm, a law firm, or even an individual law or accounting professional, consider giving a seminar for the client base of the professional or combining client bases for a joint seminar. You may suggest a private presentation to acquaint them with the program and gather support for the value of your subject matter. The endorsement of another professional may increase both your credibility and the size of your audience and may be included as part of your invitation.
- **Direct Mail.** An average direct mail response rate will run around 1% - 2%. Plan to send out enough invitations for the target size audience you want.

Advertisements: Advertising in the newspaper is probably the most obvious method of promoting your seminar. Plan your advertising carefully. Consider running at least two ads, preferably three – one on the Sunday two weeks prior to the seminar, another on the following Wednesday and the last one on the Sunday immediately preceding the seminar.

Follow-up Contacts: As a rule of thumb, only 50% of the individuals who confirm will actually attend. Plan on confirming at least twice as many people as you would like to have in attendance.

- Be sure to have someone from your office follow-up with people who have not responded and confirm attendance with those who have responded. It is important that the person taking the reservations and doing the follow-up calls be well informed about:
 - ✓ driving directions to the seminar site,
 - ✓ the date(s) and time(s) of the seminar(s),
 - ✓ whether appropriate dress is casual, business casual, or more formal,
 - ✓ whether guests are invited and, if so, how many, and
 - ✓ whether a meal or snacks will be served and, if so, what the menu is.
- The person confirming reservations should also confirm name, address, company name (if a business related seminar), phone number, fax, and e-mail. This will give you the information to build a marketing database and give you the information to send confirmations and thank you letters.
- Track all responses. During the workshop make note of who attended, who brought guests and no-shows. (Ideally the person assisting you with the workshop can do this.)

Preparations for a Professional Seminar

They say that “anything worth doing is worth doing right,” and seminars are no exception. You’ll find that a little pre-seminar preparation will be well worth the time. The following are items that can help ensure that your seminar will be *smooth sailing*.

Presentation Preparation: Rehearse and time the presentation.

- Create a well thought-out introduction for your guest speaker(s).
- If you will be the speaker, have someone else introduce you to the crowd.

Handouts & Nametags: You’ll want to be sure that the package of materials that you hand out at the seminar will provide valuable information and make a professional first impression.

- Before using any materials, check to confirm that all pieces are compliance approved.
- Business cards should be included in handout package, on the welcome table, and distributed at the end of the seminar.
- Preprinted nametags using a large font are a must. (You can use Avery Standard # 5384.)
- Use distinct nametags for guest speakers and any associates assisting with the seminar.

Prepare the Room: Arrive at your seminar location early to set up. Be sure all preparations are done before any attendees arrive.

- Have your appointment book at the seminar.
- Be sure to have an associate present to help with registering attendees, take notes of people who showed a strong interest/asked questions for follow-up purposes later, etc.
- Arrange seating in a semi-circle or U-shaped pattern to promote discussion. Ensure an unobstructed view for everyone.
- Locate the podium in the front, center for better eye contact unless using a PowerPoint presentation and screen in which case the podium should be to left side of the screen.
- Position projector to fill the entire screen. Run through the screen presentations and audio, if any, to check image and sound quality from different places in the room.

During the Presentation:

- Greet attendees and introduce them to one another.
- Reference and use the workbook or the copy of your PowerPoint presentation to your advantage. If possible, address attendees by name (indicated on pre-printed nametags)
- Encourage attendees to ask questions during the seminar. Provide a note pad, pencil and feedback form for them to jot down thoughts or questions they may have.
- Listen carefully and repeat the questions so the rest of the audience can hear it. If you don’t know the answer, say so, but promise to get back to them with an answer. Then be sure to do so!
- Defer specific questions about investment choices, client needs, etc. For example, in response to the question “Should I invest more in mutual funds, or CDs?” you may wish to respond with something like “Investment decisions are highly individualized. We do have tools that can help identify your specific needs. Let’s talk after the seminar.”
- Ask attendees to fill in the response forms and encourage them to make an appointment for a follow-up one-on-one visit. Emphasize that you are available to discuss each individual’s needs in more depth during an individual consultation.
- At the seminar conclusion thank attendees for their questions (if any) and their attention.

Post Seminar Follow - Up

You may think that as soon as you have said “Good night!” to the last seminar attendee that your seminar experience is over. Nothing could be further from the truth! Follow-up is a critical part of any good seminar. A thank you letter and seminar response form should be sent to all attendees in addition to a phone call. Please see IFS-A074019 *Seminar Thank You Consumer Letter*.

Note: Unless specifically given authority to make contact by phone, make sure that the person you are calling is not on a **Do Not Call** list. Also check the Consumer Privacy Non-Contact Application (See Operations and Controls procedures).

There are three types of leads generated by a seminar: People who attended the seminar, people who promised to attend but did not attend and existing clients who told you they couldn't attend. Each one of these types of leads can be a productive lead – if you are conscientious in your follow-up.

People Who Attended the Seminar: Within **48 hours after** the seminar, each attendee should be called. If you wait any longer, the probability of making an appointment is greatly diminished.

- Within this category there are three types of leads, listed in the order of follow-up priority.
 - ✓ People who indicated a strong interest
 - ✓ People who made statements or asked questions
 - ✓ People who attended but did not actively participate
- Don't rely on your memory to determine which of your attendees fell into which category. During the seminar an assistant should be given the task of noting which attendees seemed most interested, etc. The number and types of questions asked, the feedback form and personal observations are good clues about a person's interest level. The nametags are invaluable for keeping track of attendee names.
- **People Who Indicated a Strong Interest.** People who spoke with you after the seminar to schedule an initial meeting should be called to confirm their appointment. One purpose of this follow-up call is to better qualify the prospect and to resolve any doubts or answer questions that may have arisen since the seminar. Have your calendar handy and be prepared to offer alternative dates and times. Take the opportunity to ask for referrals.
 - ✓ Interested persons who did not schedule a meeting at the seminar but requested one on the reply card should also be contacted as soon as possible.
- **People Who Made Statements or Asked Questions.** You'll want to touch base with people who had questions, and the questions give you an excellent reason for your call. You might say something like, “*Ms. Johnson, at our recent seminar you asked about (topic). Did we answer your question to your satisfaction? (Wait for a reply) My one-on-one meetings are designed to answer any questions you may have and give you the opportunity to learn more about our services and products.*” Have your calendar handy and be prepared to offer alternative dates and times. Take the opportunity to ask for referrals.
- **People Who Attended but Did Not Actively Participate.** After introducing yourself and reminding them that you met at the seminar, you might want to say something like, “*I'm calling to see if you have any questions that weren't answered the other evening and to see if I could be of further assistance to you.*” Suggest a time and date and be prepared with alternative dates and times. Take the opportunity to ask for referrals.

- **Those Who Promised to Attend, but Did Not Show:** People who promised to attend but did not show can be excellent leads. They may feel an obligation toward you for not attending after they said they would. Call them and say, *"I'm sorry we didn't get a chance to meet (meet again...if current client) at the seminar. I'm sure something must have come up at the last minute. I understand how that is. If you can, I'd like to meet with you to review what we discussed at the seminar. I think I could walk you through the program fairly rapidly."* Suggest several alternative dates and times.
- **People Who Told You They Couldn't Attend:** Those who told you that they couldn't attend should be called as well. But, they shouldn't be called until you've contacted everyone else. The approach that has proven effective with these people is the same approach as you would use with people who promised to attend but did not show (see above).

Seminar Evaluation Form

The Prudential Insurance Company of America

Seminar Title _____

Date _____ Location _____

Please rank the meeting in the following areas:

	Poor				Excellent
Topic	1	2	3	4	5
Content	1	2	3	4	5
Format	1	2	3	4	5
Handouts	1	2	3	4	5
Speaker _____	1	2	3	4	5
Speaker _____	1	2	3	4	5
Speaker _____	1	2	3	4	5
Location	1	2	3	4	5
Time	1	2	3	4	5

Please provide suggestions on how we might improve this meeting. _____

Which topic did you find the most valuable? _____

Is there another topic you would like to learn more about? _____

Would you like to schedule a no obligation individual meeting to discuss your insurance and financial product needs? _____ Is there a preferred time and day you would like to be contacted? _____

Who do you know who might be interested in this presentation? _____

Your Name _____

Address _____

City _____ State _____ Zip Code _____

Phone _____ E-mail _____