



Clients for Life Consulting's Client Seminar System

You've Got The Power – Use It!

Professionals who understand the purpose and power of Client Seminars and know how to implement them are the individuals who create impact in today's business world. They develop highly effective people connections that get results because they know how to execute a fine-tuned plan of action – not just manage it.

Conducting Client Seminars will help you to:

- Create a sense of direction for you and your clients
- Communicate with precision
- Work smarter, not harder
- Grow your business
- Incorporate the 8 Week Seminar System Easily and Effectively

This Client Seminar booklet will guide you through a proven process and help aid in your success.

Good Luck,

Bruce Libman
President, Clients for Life

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Complete Turn Key Client Seminar System

Proven Client & Bottom-Line Builder

Reasons Why:

- Enhance Your Image
- Cost Effective
- Co-op Funding Available
- Increase Your Bottom Line
- Protect Your Client Base
- Proven Client Builder
- Upgrade Your Client Base

Turn Key Method:

- Step-by-Step Seminar Outline
- Representative Support
- State of the Art Presentation Equipment
- Prepared Presentations
- Professional Presenters
- Handout Materials
- Post-Seminar Follow Up

Three Types of Seminars

- Associations, Chamber of Commerce
- Clients
- Non-Profits

Client Seminar List of Topics *(Partial list)*

Business Planning:

- ✓ Exit Strategies
- ✓ Buy/Sell Planning
- ✓ Infrastructure Strategy

Human Resources:

- ✓ Human Resource Solutions
- ✓ Employee Benefits
- ✓ Executive Benefits Planning
- ✓ Employee Care Resources

Legal Specialties:

- ✓ Labor Law
- ✓ Employment Law
- ✓ Elder Care
- ✓ Real Estate
- ✓ Estate Planning
- ✓ Intellectual Property

Technology:

- ✓ Business Technology
- ✓ Graphic Design
- ✓ Telephone Systems
- ✓ Voice Data and Digital Services

Real Estate:

- ✓ Property Appraisal / Evaluation
- ✓ Residential Mortgages
- ✓ Residential Insurance

Planning Issues:



- ✓ Retirement Planning
- ✓ Risk Management
- ✓ Investment Planning
- ✓ Estate Planning
- ✓ College Planning
- ✓ Elder Care Issues
- ✓ Estates and Trusts
- ✓ New Tax Law Changes

Questions Regarding Seminar's Preparation and Results

Pre-Seminar Survey and Announcement Letter

How do I get Post-Seminar results now?

Proper seminar preparation and execution is an 8 to 10 week process. The purpose of the Pre-Seminar Survey and Announcement Letter (sample letter at end of document) is to generate client interest and appointments now. By responding, the client is indicating what their needs are.

Many clients will call you to schedule complimentary consultations; others will require follow up calls for scheduling.

How do I determine what topic to speak on?

The purpose of the Pre-Seminar Survey and Announcement Letter is to help determine your client's interest.

You may decide to hold more than one seminar with different topics.

Recommendation: Search database by age, income, net worth and location.

How do I determine the location for my seminar?

The responses will help identify the interested client's location.

You may decide to hold more than one seminar at different locations.

Recommendation: Search database by age, income, net worth and location.

Seminar System Procedure

Allow 8 Weeks

Phase 1: Establishing Basics and Seminar Timeline (2-3 weeks)

Week One:

- Name a coordinator for the Seminar.

- Select the audience and demographics
 - Existing Clients
 - Prospecting List
 - Income Level
 - Net Worth
 - Geographic Area
 - Professional or Business Industry

- Anticipated Number of Attendees: 25, 50 or 75
- How many individuals do you need to invite to meet your target:
 - Existing Clients - - expect four to one response ratio
 - Prospecting List - - expect ten to one mailing only response ratio; seven to one mailing and telemarketing response ratio

- Decide on Presentation
 - Topic and Material
 - Who will present (Bio of each presenter and partner)?
 - Will there be a celebrity guest speaker?
 - Determine and estimate budget
 - Participation included in cost?

- Location and Venue
 - Establish seminar dates and time
 - Facility
 - Coffee, Breakfast, lunch or dinner
 - Duration: 1,2 or 3 hours

Week Two:

- Contact and confirm dates with all participants
- Organize database on disk
 - What software will you use?
 - Who will do the mail merge/stuffing/postage and mailing or email invitation and track responses?

Week Three:

- Select the invitation form
 - Email and 'snail' mail
 - RSVP (dated information printed on envelope; clearly noted in evite)
 - RSVP & invite a guest
- Review progress of materials for presentation
 - Hand out material
 - Review follow-up letters/emails
 - Seminar evaluation form

Week Four:

- Review materials, proofread, send to printer/prepare 'soft' copy for email, or pre-populated flash drive.
- Contact PR Firm for media coverage

Phase 2: Execution of Seminar based on Timeline Established

Week Five:

- First sending of invitations
- Provide copies and review all material for presentation
- Rehearse as needed

Week Six and Seven:

- Post/Email confirmations and directions to the responders
- Post/Email second notice
- Telephone representatives call to confirm invitation was received if not using tracking (e.g., newsletters such as Constant Contact, Evites...)
 - Do they plan to attend?
 - Would they like to invite a guest?

Week Eight:

- Evaluation forms
- Referral Invitation form for next seminar
- Request desired topics for next seminar
- Sample plans to circulate
- Book containing letters of recommendation and media kit

Phase 3: Seminar Timeline - 48 Hours

Week Nine:

- Post-Seminar Follow-up
 - Post/Email Evaluation Forms – if not completed at seminar
 - Telephone Representatives call for a phone evaluation/survey or email survey (e.g., Constant Contact Surveys, SurveyMonkey, etc.)
 - How did you like the seminar?
 - Would you like us to reserve your space in our next seminar?
 - Is there a topic you would like to hear more about?
 - Who would you like to invite as a guest for the next seminar? (Get name and phone number).
- **Consultation Appointment Offer**
 - Would you like to schedule a complimentary Planning meeting with Mr./Mrs.?
 - If yes, “OK – I will have his/her assistant call you to schedule an appointment. Are morning or afternoon appointments best for you?
 - What day of the week works best for you?”

Estimated Cost (per 25 attendees)

- Printing:
 - Invitation \$ _____
 - Envelopes \$ _____
 - Survey \$ _____

- Postage (two-step mailings) \$ _____
- Presenter Bio and handouts \$ _____
- Telephone representative Phase 2 (invitation and confirmation)/Evite \$ _____
- Telephone representatives Phase 3 (survey and consultation offer)/Email survey \$ _____
- Prospecting List \$ _____
- Room \$ _____
- Refreshments \$ _____
- Pens and Pads \$ _____
- Door Prize – basket of fruit or cheer \$ _____

- TOTAL** \$ _____

Pre-Seminar Survey & Announcement Letter Sample *Modify, as necessary, for email version*

(Firm Letterhead)
Date

Mr. & Mrs. Client
Address

Dear Mr. and Mrs. Client:

In our continuing effort to provide value-added services to our clients, we are preparing to present a highly informative and professional seminar. The presentation will be held at a prominent hotel or restaurant in the near future.

We have provided seminar topics for your consideration. This is your opportunity to help select the seminar subject matter. Please take a moment and categorize the topics of interest to you. Once the responses have been received, the topic will be selected. Seminar topics may be added to the schedule based on the number of responses received.

Sample Topics – rank in order of importance 1 – 10

- | | |
|---|--|
| <input type="checkbox"/> Employee Benefit Regulations | <input type="checkbox"/> Business Technology |
| <input type="checkbox"/> Real Estate | <input type="checkbox"/> Elder Care Issues |
| <input type="checkbox"/> Life Insurance & Disability | <input type="checkbox"/> Business Planning |
| <input type="checkbox"/> Personal Financial Needs | <input type="checkbox"/> College Planning |
| <input type="checkbox"/> Corporate Benefits | <input type="checkbox"/> Estate Planning |
| <input type="checkbox"/> Other _____ | |

Please return your response as soon as possible in the self-addressed envelope.

If you have a personal question regarding any of these topics, please feel free to schedule a complimentary consultation.

Thank you for providing your selection.

Sincerely,

(Your Name)