SEMINAR GUIDE

STEPS FOR PLANNING AND EXECUTING A SUCCESSFUL SEMINAR

WITH A TESTED PROGRAM, THE RIGHT MARKETING SUPPORT AND APPROPRIATE FOLLOW-THROUGH, SEMINARS CAN BE ONE OF THE MOST EFFECTIVE WAYS OF GENERATING NEW BUSINESS.
DID YOU KNOW?

90%

The right topic will contribute to 90% of your success, from the first meeting all the way to your prospect becoming a client.*

20% - 40%

In a room of qualified prospects, generally 20-40% of those attending the seminar will want to see you immediately.*

*These statistics were taken directly from lifehealthpro.com and advisortoday.com.
SEMINARS SIMPLIFIED
DMI’s Proprietary Sales System Integrates Seminars Into Your Practice

Seminars are the top prospecting method for advisors. Our seminars enable you to build your brand, grow your business with smart educational content and the tools to market it, convert more prospects into clients and be seen as a trusted advisor.

• Comprehensive, topic-specific, dining event, and client seminars available
• Topics include Social Security, Retirement Income, Estate Planning, and more
• Unmatched library of high-quality, relevant content
• Supported by direct mail program to get in front of more qualified prospects
• Positions you as a credible and unbiased authority on financial topics
• Drives one-on-one follow-up consultations with prospects

Seminars are proven to have a powerful draw in helping advisors get in front of new prospects. By studying our seminar program and learning all necessary aspects of the program, you will position yourself for a successful seminar that yields results!

VENUE & DATES
Picking a location is a key component to the seminar process. A local library or community center is preferred because typically you can secure the space at no charge. However, a hotel will also work, but take into consideration there may be a rental fee. You want to be sure the location has the proper materials to execute your seminar (i.e. projector/screen, audio/visual components, podium, etc). After picking a location, you then select dates for your seminar.

INVITATIONS
We partner with a mailhouse to execute the seminar mailing process for you. Once you have chosen your location and dates, you will then complete the mailhouse order form with payment and send to DMI no later than 45 days prior to seminar. TeleDirect is a reservation confirmation company that tracks all reservations for the seminar. TeleDirect will also make confirmation calls 1-2 days prior to the seminar.

TRAINING
Training is an essential part of any seminar program. DMI offers a comprehensive 30 day training process to ensure that you have a full understanding of seminar basics and all the various planning strategies.

ZIP CODES
Selecting zip codes is the first step in the seminar process. You will select zip codes in the area where you want to conduct your seminar. Once a target area is selected, DMI will run counts for a 5-10 mile radius. The total count should be 5,000-10,000. Once the zip codes are verified, DMI will send a spreadsheet to you with a complete breakdown of the demographics.

TIP: DMI can tailor and customize any of our seminar programs to meet your needs.
THE SEMINAR PROCESS

PRE-SEMINAR
DMI will reach out to you prior to your seminar to review all materials and to ensure you have everything you need. If you need any marketing materials, DMI's Marketing Services Team is able to assist.

Materials may include:
1. Pop-up banners and signage
2. Corporate identity kit
3. Evaluation form
4. Notes page
5. Attendance sheet
7. Laptop/USB flash drive with presentation
8. Pens
9. Clipboards, if necessary

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We suggest that you arrive at the venue at least 2 hours prior to your scheduled start time. Ideally, you will have a staff member with you to greet guests, check them in, and make sure they are comfortable. When you first arrive, speak with the venue on-site coordinator to review your needs for the seminar. This is also the time to set-up and test your Audio/Visual requirements for the presentation.

POST-SEMINAR
When the presentation has concluded, your on-site staff member should set appointments for those who have indicated interest. We suggest that every seminar attendee be called within 24 hours to schedule an appointment. DMI requests that you provide us with the number of people attended, number of no-shows, and number of appointments made on-site.

It is extremely important for you to continue to build relationships with attendees as well as with those who were unable to attend. DMI provides sample letters that you may customize to fit your needs.

We value and welcome all feedback regarding the seminar process. Although we do consider ourselves 'seminar experts', we are always looking for ways to improve the process.
SEMINAR CHECKLIST

PRE-SEMINAR

VENUE: 4-6 WEEKS PRIOR
- Location, location, location!
- Venue should be attractive and well-maintained
- Size-appropriate for the number of expected attendees
- Audio/Video package available
- Accessible to the disabled
- Ample parking
- Easily accessible to/from major highways

INVITATION: 4 WEEKS PRIOR
- Place order with mailhouse: 5,000 – 10,000 invitations within a 5-10 mile radius of the venue.

PRESENTATION: 2 WEEKS PRIOR
- Make sure that you are comfortable and familiar with the presentation
- Be as well-groomed as you would be meeting your best client
- Determine if/when you will allow for breaks for the comfort of your guests
- A/V presentation equipment – laptop, projector, screen, speakers, microphone, etc.

CONFIRMATION PROCESS: 1 DAY PRIOR
- Check final RSVP list after the confirmation calls are complete
- Call venue to confirm and communicate any last minute details
- Pack all materials needed for seminar:
  - Corporate identity kits/marketing materials
  - Evaluation Forms
  - Pens
  - Pop-up banners and/or signage – make sure hotel has seminar listed on the lobby reader-board
  - Printed paper copy of the registration list
  - Gum/mints
  - Giveaway or raffle (for those that hand in the evaluation form)

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CHECK-IN / REGISTRATION: DAY OF
- Arrive at venue 2 hours early
- Speak with on-site event manager to review protocols - set up and test A/V needs
- Staff member to greet guests, check them in and make them comfortable
- Distribute Corporate Identity Kits/marketing materials
- Display pop-up banners and/or signage
- Display refreshments, water, coffee, etc.
- Devise a method for seating those who arrive late without making them feel uncomfortable or disturbing others

POST-SEMINAR
- On-site staff member to set appointments
- All prospects who attend a seminar must be called within 24 hours to schedule an appointment
DID YOU KNOW?

TIME OF DAY

For peak attendance, consider holding your event during the day.

DAY OF THE WEEK

Tuesdays, Wednesdays, and Thursdays are usually the best days. Evenings may be better for those who are not yet retired.

TIME OF YEAR

Choose a month when people are focused on their finances like tax time or back-to-school.
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