

## The Top 10 Seminar Planning & Marketing Mistakes Attorneys Make!

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We've indicated [time and time again in this newsletter column](#) why seminar marketing - - whether to the public, to professional referral sources, or to your existing clients - - can drive substantial, consistent revenue into your practice (and has, for me, for over 30 years).

But, successful seminar results depend on the details of your seminar marketing being done *right*.

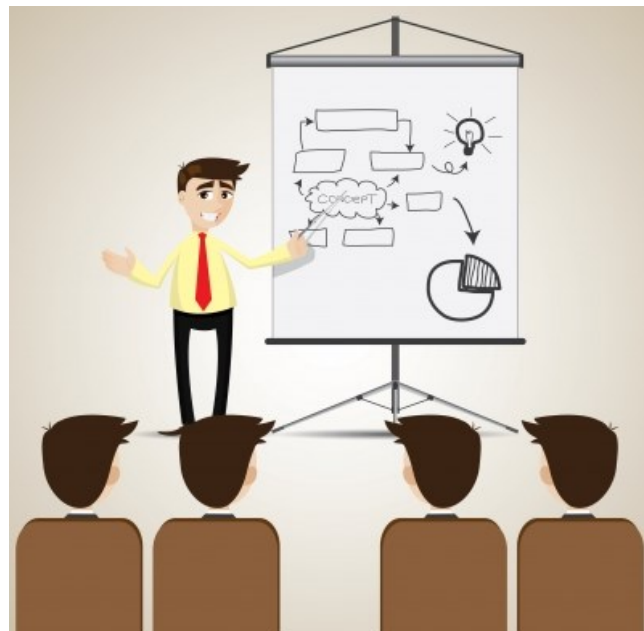
Some estate planning professionals ignore, or simply aren't aware of, these details and their seminar results suffer. Others believe there are so many details that they can't possibly handle all of them right and decide not to do seminars altogether!

That's too bad, because if you had a clear track to run on, a tested and proven set of doable procedures and checklists that could lead you (and your staff) to the promised land, seminars could produce a great return on your time, effort and money (or a significantly greater return than you may be getting now).

I'm often asked about my seminar success "formula". There are basically 3 parts to it. First, there's the planning and marketing. Second, there's the staff support the days before, during, and after the seminar. Third, there's the speaker's presentation skills. Each of these 3 parts breaks down into a number of details, any of which if not done right can significantly diminish your results.

Let's just look at the first part of the success formula - - Planning and Marketing.

How many of these mistakes are you currently making (or have made in the past or are about to make)?



### Seminar Planning & Marketing Mistake #1: You Don't Set a Proper Seminar Budget.

Not just any seminar budget number picked out of the air, but one that is scientifically calculated so it pays for itself many times over. Chances are, you don't know how to do this. Unfortunately, most seminar budgets are set up wrong because there is no understanding or tracking of the big picture goal - - return on investment! That, in fact, determines your budget.

### Seminar Planning & Marketing Mistake #2: You Do Not Have a Clearly Defined Target Audience.

If you haven't identified your ideal client to target, then how could you possibly target them with your marketing and get them to your seminar? Knowing who your ideal client is and making sure that your marketing reaches your ideal client so that they will attend your seminars is a key step to making them successful.

### Seminar Planning & Marketing Mistake #3: You Give Your Seminars on the Wrong Dates and At the Wrong Times.

If you're not picking the best days and times to give seminars, your seminars are likely doomed for failure. The choice cannot be about what time is convenient for you. You have to think about when your target audience would be available to attend and be focused at a seminar. (HINT: It might be on days and times that you've never thought of or have always been told to avoid!)

#### **Seminar Planning & Marketing Mistake #4: You Don't Hold Your Seminars at the Right Venues.**

Location, location, location is key to successful seminars. If a location is hard to get to, too far to drive to, too hard to find, too expensive or too difficult to find parking at, all of these things will scare off potential clients from attending your seminar. Additionally, make sure that the seminar room has the right ambience and features to set the right "mood" and comfort for your attendees. It's very important to check out seminar locations and have a proper inspection checklist when you do!

#### **Seminar Planning & Marketing Mistake #5: Providing the Wrong Refreshments or Meal!**

People love to eat, so if you serve some refreshments or a meal, they're more likely to attend (and bring their spouse, family or friends). When they've eaten, they also tend to be more attentive and in a more receptive mood. Are you providing the wrong refreshments or meal to your attendees? Or, perhaps you're not providing any at all? Knowing the kinds of refreshments or meals to serve (and when to serve them) is important to successful seminars.

#### **Seminar Planning & Marketing Mistake #6: Your Marketing is Not Being Sent at the Right Time.**

It's important to time your marketing of the seminar properly. If it goes out too early, you might have prospects place the marketing piece down and decide they'll think about it or register later. If your marketing goes out too late, people may not be available or won't have enough time to make arrangements to attend. Knowing the tested and proven timing for seminar marketing is key to maximizing your response.

#### **Seminar Planning & Marketing Mistake #7: Your Marketing Piece is Not Effective.**

Your marketing might go out at the right time and might be targeted to the right people, but all of that will go to waste if your marketing piece fails to meet the 7-Point Test of an *Effective Marketing Piece*. Not having all seven of these elements on your marketing piece -- that invoke a response from your target --

will also set up your seminar marketing efforts for failure! You may have an existing piece you feel is working fine, but I assure you that your response will be greatly enhanced if you tweak it to have all 7 key components, done right.

#### **Seminar Planning & Marketing Mistake #8: You Don't Rely on Enough Marketing Delivery Methods (or the Wrong Ones!).**

There are multiple ways to deliver your marketing (other than just direct mail) and if you rely only on one or two delivery methods (or the wrong ones), you will also severely impact your seminar results. Using multiple delivery methods correctly will have a compound effect that will drastically improve your seminar attendance.

#### **Seminar Planning & Marketing Mistake #9: You're Not Tracking Your Results Properly (or At All!).**

Do you track your seminar results? Not just the fees you made from any clients that you engaged, but actually track the underlying "metrics"? From the response rate on the mail piece, to the amount of no-shows at your seminars, to the percentage of people that scheduled appointments and came in, to the net profit (after expenses) actually made from the seminar. Do you *really* know if your seminar efforts are profitable or not? Do you know why -- what's working and what's not? You need to be able to know these detailed metrics so that you can make positive adjustments and plan future seminars.

#### **Seminar Planning & Marketing Mistake #10: You're Missing the Big Picture Goal of Seminar Marketing.**

What's the goal of seminar marketing? To educate people? To let people know about your firm and what services you offer, in hopes that people might want to do work with you? The entire goal of a seminar is to book appointments -- right at the seminar! The fact is, if you don't have a formal process for booking appointments right at the seminar -- and properly prepare for this process before the seminar -- you are wasting your time (and money)!

So, how'd you do?

Perhaps you're not making all of these mistakes in the planning and marketing steps of your seminars, but avoiding even one or more of these mistakes can dramatically improve your seminar results.

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I don't have the space here to go into further detail on each of the necessary steps of planning and marketing successful seminars. However, after many requests, I am pleased to announce that we have just put together, for the first time ever, three special 90-minute programs on how to plan, market, manage, track and present successful seminars. For more information about this 3-part series, [click here](#).

#### **ABOUT THE AUTHOR:**



Attorney Philip J. Kavesh is the principal of one of the largest estate planning firms in California - - Kavesh, Minor and Otis - - now in its 34th year of business. He is also the President of The Ultimate Estate Planner, Inc., which provides a variety of training, marketing and practice-building products and services for estate planning professionals. If you would like more information or have a question for him, he can be reached at [phil@ultimateestateplanner.com](mailto:phil@ultimateestateplanner.com) or by phone at 1-866-754-6477.

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