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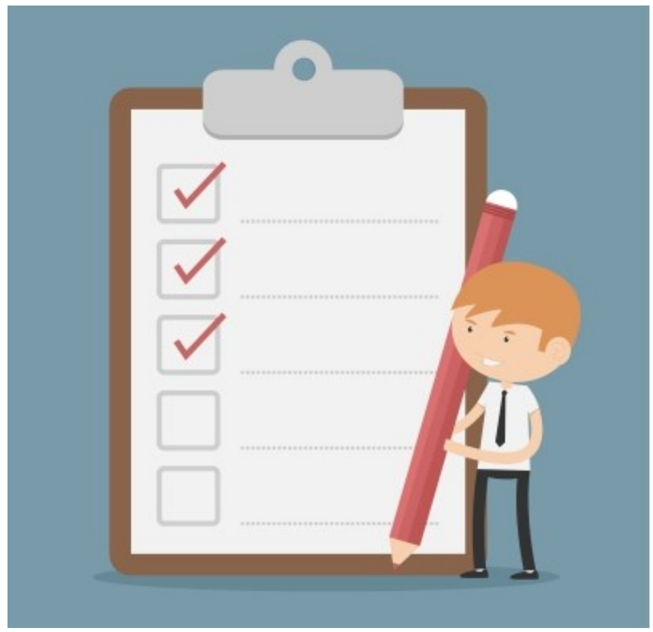
If You're Doing Seminars (or Are Thinking About Doing Them) Your Staff Better Know About and Be Handling These Important Details!

Kristina Schneider, Executive Assistant

The common saying "The devil is in the details" is probably never more true than when it comes to seminar marketing. Whenever I'm discussing seminar marketing with attorneys, it becomes pretty clear to me that a lot of estate planning attorneys are overlooking a number of key details that should be completed. Successful seminar marketing is the result that comes from the compound effect of a lot of steps to be handled during the planning process, just before the seminar, during the seminar, and right after. Even missing one or two of these steps can greatly impact your results.

I have put together a condensed list of some of the different steps and details that should be handled (mostly by support staff).



DAYS LEADING UP TO THE SEMINAR

- Take down seminar reservations
- Confirm (by phone) all seminar reservations
- Send letter (or postcard) to confirm any seminar reservations made more than 3 days before the seminar
- Prepare seminar materials:
  - Reservation list
  - Sign-in sheets
  - PowerPoint slides
  - Outline
  - Response Form
  - Flyers and brochures
  - Articles
  - Appointment cards
  - Appointment packets
- Schedule enough facilitators for the day of the seminar
- Coordinate and confirm details with seminar location:
  - Room layout
  - Refreshments/Meal Menu
  - Timing of service
  - Parking
  - AV needs

2 DAYS BEFORE THE SEMINAR

- Confirm (by phone) all seminar reservations
- Assemble any additional handout packets
- Start packing for the seminar

DAY BEFORE THE SEMINAR

- Confirm (by phone) all seminar reservations that you have not yet reached

- Finish assembling any additional handout packets
- Finish packing for the seminar

DAY OF (AND DURING) THE SEMINAR

- Leave for the seminar early (anticipate traffic or bad weather)
- Set up signage
- Confirm location of restrooms (to direct seminar attendees during the seminar)
- Set up registration table towards the front of the door (but still inside the room)
- Greet people when they arrive and check them in
- Seat people towards the front
- Prepare registration table for appointment-making process
- Book appointments and give attendees appointment packets
- Collect all response forms from attendees (whether or not they book appointments)
- Quickly debrief with speaker after the seminar

IMMEDIATELY AFTER THE SEMINAR
(Or as soon as possible)

- Place appointments on the calendar
- Follow-up (by phone) with seminar attendees that handed in response forms but did not book appointments
- Send confirmation letter to attendees who booked appointment
- Enter data received by attendees on Response Form on database

Hopefully you're already doing a lot (or even most) of these steps. If you're not, then you might need to re-visit how handling these steps might help your seminar marketing efforts. If you are, but not getting great seminar results, then maybe there are details in each step which you are missing.

This checklist of action items is just a quick glimpse of some of the key tasks that need to be completed by staff, but just about every single step has a number of details and steps that make it successful. For example, when it says "Confirm all seminar reservations by phone", are you following a tested and proven 3-touch phone confirmation process? Or, when it says to collect response forms, do you have someone stand by the exit to redirect people trying to leave and, does this person know what to say and how to handle some of the most common objections to making their appointment right then and there?

We can't cover everything in this article, but our President and seminar expert, Philip Kavesh, will present a special teleconference on **Wednesday, June 17, 2015 at 9am Pacific Time (12pm Eastern Time)** entitled, "Proper Staff Support - - The Days Before the Seminar, During the Seminar & Immediately Afterwards". Phil will spend 90 minutes going into the nitty gritty details of each of these steps and how to make sure they're properly executed for maximum seminar results!

Hope you'll join us! This is the first time he's made this information available in a teleconference like this!

ABOUT THE AUTHOR:

Kristina Schneider is the current Executive Director of The Ultimate Estate Planner, Inc. She graduated with a Bachelor's Degree in Business Administration from Pepperdine University in 2004 and was hired right out of college to work for the Law Firm of Kavesh, Minor & Otis, coordinating and facilitating Philip Kavesh's "Missing Link" Boot Camps while also providing administrative support to Mr. Kavesh as his Executive Assistant for over 7 years. With a combined almost fifteen years of administrative experience and her direct experience working at Mr. Kavesh's law firm, Kristina has been able to assist numerous estate planning professionals through The Ultimate Estate Planner, Inc. And, equally as important, she has assisted the executive assistants and staff members of many of these estate planning professionals to provide better service and support. You can reach Kristina at (424) 247-9495 or by e-mail at kristina@ultimateestateplanner.com.

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