

Host a Successful Educational Workshop

A guide to planning amazing events for your clients.

How Can I Host a Successful Workshop?

Hosting a successful workshop is all about following the right steps to guide you through the planning, hosting, and follow-up of the event. The goal of any workshop is to close business with new clients, but that's a lot easier said than done. Each of the steps outlined in this document were written to ensure that your educational workshop attendees turn into loyal clients! Each step is a vital piece to creating long-lasting relationships with clients that can refer their friends and family to gain even more business.

8 Weeks Out

Choose Your Location

For an educational workshop, we recommend sticking to places with large conference rooms or lecture halls, these places are typically found on college campuses, but can be found elsewhere too. Choosing the correct venue to host your educational workshop will depend on a couple of factors, including **location, price, capacity, and layout**. Below we have outlined the different factors and what you should look for in each of them.

1. Location

You will want to choose a venue that is close for your target audience. A good rule of thumb is to make the event within a **15-20 minute** drive for the majority of the attendees.

2. Price

Prices can vary widely depending on the area you live, but we recommend choosing a budget that matches your needs and going from there. Consider the area of the venue, the size of the venue, and whether the venue has the technological capacities that you need; all of these factors will impact the overall cost for the venue. You can try to negotiate a lower price with these two points:

- You could become a repeat customer if the event goes well, maybe even weekly.
- You are doing advertising for the venue by sending out their information to everyone you have invited to the event.

3. Capacity

Most of the venue options you will be deciding between will have a large enough capacity to accommodate your needs, but you will want to ensure that everyone can see the presentation clearly, which, depending on the layout of your venue could lower the capacity amount you feel comfortable hosting there.

4. Layout

The layout of the venue is just as important as any of the other features. You want to ensure that you have your own private space that can ensure all of your guests feel comfortable and that you can give the presentation only to them, not an entire building of people. You'll want to ensure that everyone can see you from anywhere in the room.

Choose Event Date

When choosing a date for your event, avoid any holidays or other big events, such as a playoff game in your area, or other large local sporting events. **Do not** schedule all of your events on the same weekday at the same time. Generally, Tuesday, Wednesday, or Thursday evenings work best, but it all depends on your area! You want to offer a variety of options to your guests to ensure that a time will work for everyone who wants to attend. If a certain date and time does not work for someone, make sure to tell them that you offer other days as well. Planning a few workshops in advance will help to make sure everyone can find a time that fits in their schedule

Decide On a Presentation Topic

M&O offers workshop kits on a multitude of topics including Taxes in Retirement, Retirement in America, IRA/RMD, Social Security, and more! You can fill out a request on MO-Market to have your chosen presentation customized with your logo, colors, fonts, and headshot.

Order Materials

It's important that you have enough branded materials to last for a few more seminars at all times. If you notice that you're running low on materials, then you should note in the presentation customization form which additional resources you need ordered. The resources that we feel are essential are:

- Folders
- Folder inserts
- Letterhead
- Business Cards
- Pens

Other resources that you may consider are:

- Banner
- Branded Table Cover

Note: These additional items are very time sensitive! They **must be ordered at least six weeks prior to the event you need them for or they will not arrive in time.*

Marketing the Seminar

There are quite a few different ways to market your event. Typically, advisors stick to direct mail, digital marketing, or a combination of both. Assess your budget for the event, the capacity of the venue, and other factors before deciding what would be the best choice for you.

1. **Direct Mail:** M&O has relationships with two different mailhouses, and direct mail has proven to be a very profitable tactic when advertising workshops. We can connect you with a mailhouse that can give you the best suggestions regarding demographics, budget, amount of mailers, etc.
 - a. General Recommendations for Direct Mail:
 - i. Allow 5-6 Weeks for pre-planning
 - ii. Target Dates: Tuesdays or Thursdays, with a 6:00-6:30 P.M. start time
 - iii. Mail more mail and host smaller group events
2. **Digital Marketing:** Our digital marketing team can advertise your upcoming seminars on your behalf through Facebook Advertising. Our digital campaigns include a variety of ad spend options, custom landing pages and A/B testing to ensure the best result. Contact us to learn more about our digital marketing options.

6 Weeks Out

Prepare and Practice Your Presentation

Now that the event is approaching, it's time to start practicing and preparing for your presentation. At this point, you should be focused on doing each of the following steps a few times before the day of the event:

- Set up the equipment that you plan to use at your seminar and run through anything you plan to present at the event.
 - *This could include ensuring that your laptop can run any videos you may play correctly, turning on your projector, making sure that your speakers work, and more.*

- Check to make sure you have all of the necessary materials for your event, including any folders, handouts, pens, appointment packets, or anything else you would like to give to attendees.
- Decide whether or not you would like any additional branded materials, such as a table runner or poster.
- Set up your seminar binder with a mailer sample, seminar planning checklist, overflow sign-ups, and seminar worksheets.
- Start to run through your presentation periodically.

2 Weeks Out

At this point, reservations should be your new priority! There are a couple of things that can make this process run more smoothly for you.

- First, have you or someone else try your own registration process to ensure that it is easy to use and works properly.
- Next, as RSVPs are coming in, keep a list of them that is in a safe spot and easy to find. *You will need to call your RSVP list in the future; keeping a running list of everyone who has RSVPd will make this process easier.*

Don't forget to practice your presentation often from this point on to make sure you are all set for the big day!

1 Week Out

Monitor RSVPs

With the event coming up quickly, you will want to start finalizing your RSVP list. If you notice that your reservations are low (under 50% of your max number), there are a couple ways to boost the number:

- Email blast your existing clients and ask for referrals.
- Mail extra copies of your mailer to no-shows from previous events.

2 Days Before Workshop

The last thing you want is to be stressed about small details on the day before or the day of your event. Two days before, get all of your materials ready for the event.

Pack Your Seminar Tote

Pack your seminar tote with all the necessary materials, including, folders, appointment packets, projector, laptop, speaker, markers, etc. *Typically, you should*

prepare one folder per buying unit (either a single/widowed person or a couple) that has reserved a seat at your seminar, however, it is always a good idea to pack extra.

Google Your Attendees

We recommend Googling your attendees to help you understand your audience better. Some may be repeat attendees, or have distinguishing characteristics, such as, owning their own business, being tax professionals, or educators. Based on your Google search results, you will have a better understanding of who you are presenting to and will be able to interact with your audience on a more personal level.

Day Before Workshop

Make Confirmation Calls

Make **confirmation calls before noon** to confirm attendance, the number of people they are bringing, and the start time of the seminar. When you are on the phone with the guest (or if you need to leave a voicemail), relay the following information:

- Ask attendees to arrive 15 minutes before the start time in order to get all set up and seated.
- Tell them any important information needed, such as things about parking, construction near the venue, location of the seminar inside the building, if the location is typically extra warm or cool, etc.
- If you need to leave a message, be sure to ask them to call you back to confirm the reservation. If you don't hear back from them, call one extra time at the end of the work day.

Do not forget to call anyone who signed up online or any overflow signups.

Prepare Final Attendance List

Then, prepare the final attendance list for the day of the event. Mark down anyone attending who was a referral and make sure to give them some special treatment. *If a pre-existing client is bringing people that they referred, place a sign on seats in a prime location that you've reserved for them.*

Lastly, call the venue and tell them the final headcount.

Day of Workshop

Before leaving for the venue:

Double check your tote and make sure you have all the necessary materials and print off a calendar with your availability that you can utilize to make appointments once the seminar is completed. Make sure this calendar clearly depicts what days and times you are free.

Bring the contact information in hard copy for your guest list. In case of an emergency, such as the venue losing power and no longer being able to host your seminar, you want to be able to call each attendee as efficiently as possible. We also recommend bringing someone to assist in checking in attendees, setting up equipment, and scheduling appointments.

Arrive at the venue at least one hour before the start time to set up!

Make sure the room is clean, music is off (or low if it can't be turned off), that the temperature is comfortable,

- Set up a sign-in table right outside your room or space. There should be signs that point guests to this table.
- Review rules with the building staff to make sure that you are allowed to do everything you have planned.

When guests start arriving:

- Hand every attendee a name tag and seminar folder. *You can do one folder per couple, if needed.*
- If you have a guest speaker, make sure they are not visible to the audience until after they are introduced in the presentation.
- Make sure attendees are all seated in a way in which they can see the presentation screen.
- Secretly make a seating chart with names of attendees that you can refer back to later. This will help you in the future to remember the names of the people who were paying close attention and the names of the people who seemed uninterested.

Start of Presentation

- Do not start the presentation late, be respectful to the people who did show up on time, even if all of your guests have not arrived yet.
- Go over the schedule for the day and any expectations you have or the audience should have.
- Explain the contents of the folder to the attendees and ask them to fill out the Response Sheet to be turned in at the end of the seminar.
- Introduce yourself or your speaker.

End of Presentation

- Encourage the attendees once again to fill in their Response Sheet.

- Make sure to go around and collect Response Sheets, the peer pressure of seeing others fill them out might make more people decide to fill theirs out too.
- Allow the attendees the chance to schedule an appointment time with you and ask questions after the presentation is over.

Day After Workshop

1. Track how many people came to the event, how much it cost to put on the event, and how many leads you have generated. Make sure to take into account any random occurrences that could have made the event perform worse, including, bad weather, traffic problems, etc.
2. Put all of the Response Sheets together and label them with the date and location for reference in the future.
3. Enter contact information for each attendee into your CRM system.
 - Note the date and location of the seminar, and whether they booked an appointment, requested a call, or not.
 - Enter any other important information that was gathered by you or your assistant at the workshop. *Sometimes guests will disclose information about their finances to you, you may notice something from observing, or there may be other things that you may think are worth noting.*
4. Call the attendees who requested an appointment first to verify the time and date. Then call attendees who requested a phone call.
 - Make sure to thank each guest for coming and to answer any of their questions.
 - Ask for general feedback on the venue, presentation, and location.
5. Call anyone who RSVPd but did not attend the workshop and invite them to a different upcoming seminar.
6. Send out letters to anyone who attended the workshop but didn't request an appointment or phone call and invite them to your office in the future.