



# SEMINAR QUICK START GUIDE

POWER UP YOUR NEXT EVENT



## SAMPLE SEMINAR SCENARIO - BY THE NUMBERS

Before you get started with seminars to help you grow your insurance business, take a look at the bottom-line impact they could have on your business. This hypothetical example of a seminar mailing demonstrates the potential outcome of a typical seminar in terms of attendance, cost, possible commissions generated and overall Return on Investment (ROI).

### SINGLE SEMINAR SCENARIO

Potential Attendance & Appointments	
Number of Mailers	7000
Response Percentage	.91%
Total Attendees	63
Prospective Buying Units	41
Appointment Percentage <sup>1</sup>	33%
Projected Appointments	13
New Client Percentage <sup>2</sup>	33%
Projected New Clients	4
Potential Annuity Commissions*	
Average Commissions Per Client	\$7,762.50
<b>Total Commissions</b>	<b>\$31,050.00</b>
Estimated Cost	
Marketing Cost <sup>3</sup>	\$5,040.00
Meal Cost	\$1,575.00
<b>Total Cost</b>	<b>\$6,615.00</b>
<b>Cost Per Prospective Buying Unit</b>	<b>\$161.34</b>
Potential Net Profit	
ROI	469%

### MULTIPLE SEMINAR CAMPAIGNS

Quarterly Seminar Campaign Scenario		
Annual Marketing Costs		\$20,160.00
Annual Meal Costs		\$6,300.00
Annual Total Cost		\$26,460.00
Annual New Appointments		52
Annual New Clients		16
Annual New Commissions*		\$120,200.00
Additional Seminar Campaign Scenarios		
Number of Seminars	Total Costs	Total Commissions*
5	\$33,075.00	\$155,250.00
10	\$66,150.00	\$310,500.00
15	\$99,225.00	\$465,750.00
20	\$132,300.00	\$621,000.00

This hypothetical example is shown for illustrative purposes only and is not guaranteed. Your actual results may vary.

## QUICK TIPS TO HELP INCREASE RSVP NUMBERS

- Historically, Tuesdays and Thursdays tend to pull the best attendance numbers.
- Be sure you mail to the right demographics for your topic.
- Invitations should be in the guests' hands at least 10 days before your event.
- Invite a few clients and ask them to bring a guest.
- Make confirmation calls the day before your event.

<sup>1</sup> Generally, approximately 1/3 of attendees set an appointment.

<sup>2</sup> Generally, approximately 1/3 of attendees become clients

<sup>3</sup> Based on average mailer cost of \$0.72, derived from various industry mailhouses.

\* Hypothetical example based on 6.75% commission and fixed index annuity case size of \$115,000.

## HOW TO PACK AND EXECUTE EFFECTIVE SEMINARS



- 1. Specify Your Target Market.** Determine the demographics of your ideal client and identify the presentation topic that will be relevant to them.
- 2. Feed your attendees.** Being hospitable and feeding your guests is still one of the best ways to attract the most prospects, like it or not.
- 3. Select a marketing company for your mailing.** To get in front of around 30-40 prospects per event, you will need to mail invitations to roughly 5,000-7,000 people in your target market. Be sure you work with a reputable organization that has a track record for success. (See a list of turnkey seminar vendors on the next page.)
- 4. Give your guests a choice.** Your invitation should offer guests at least two (preferably three) dates to conveniently select from. Historically, Tuesdays and Thursdays are the best days to host seminars. The best time to hold your seminar is usually 6:30p.m.
- 5. Venue selection.** Seminars held at local restaurants typically experience the highest attendance. Country Clubs are a viable choice in some areas. Locations that are easily accessible, within a 20-minute drive, have a good reputation, and provide ample parking are ideal. Local restaurants with a private event space tend to work best. Meal costs vary widely depending on the area of the country. Generally, they average \$20-\$40 per person.
- 6. Room setup.** Be certain you and your staff arrive early to make sure the room is properly setup. This includes making sure there are enough tables and seating for each of your guests. Also, tables should be setup so none of your attendees will have their backs to you. Test your PowerPoint presentation and the placement of your screen to be sure everyone can see the screen and read the slides clearly from anywhere in the room. Run a sound check of your microphone (preferably a lavalier style versus a handheld).

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*Various state insurance regulations, as well as other state regulators, prohibit the "gifting" of items, which may include entertainment expenses incurred by a financial professional, in excess of a certain dollar value. Be sure to check your state's requirements and/or your firm to ensure that you are complying with your specific state's requirements and guidelines.*

- 7. Be a good host.** Have your staff warmly greet guests as they arrive. Guests should be helped to register, confirm their contact information, and be given a name tag.
  - 8. Start and end on time.** Show your guests that you value their time by beginning your event promptly. It is helpful to have your registration table outside of the main room to register late attendees. Attempt to keep some of the tables in the back of the room open by placing a "reserved" sign on the table for late arrivals, so you are not interrupted by them.
  - 9. Gather evaluation forms.** Setting appointments is the single most important goal of a seminar. The evaluation form should offer attendees a list of dates/times to circle to indicate their preference on meeting with you. As evaluation forms are collected, your staff can enter appointments onto your calendar and provide appointment reminder cards the evening of the event.
  - 10. Practice. Practice.** Rehearse your presentation on your own to master the information and the slide transitions. When you're ready, rehearse in front of a family member, friend, or staff member who can give you candid feedback on your presentation style.
- You now have the basic structure in place to host an effective event. Ready? Set. Go!

## TURNKEY SEMINAR VENDORS

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### LEADING RESPONSE

(Formerly RME360 & Resource Solutions Inc.)

**Scott Kasprzyk**

scottk@leadingresponse.com

813-885-8236

LeadingResponse.com

### ACQUIRE DIRECT

**John Merrer**

jmerrer@acquiredm.com

(800) 771-9898, ext. 234

acquirefinancial.com

### WHITE GLOVE

**Elizabeth Van Horn**

elizabeth.vanhorn@whitegloveworkshops.com

(844) 949-9497

www.whitegloveworkshops.com

### POWER MAILERS

**Chase Hebel**

chase@powermailersdirect.com

(813) 453-1969

powermailers.com

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## SEMINAR TIMELINE: PRE-PLANNING CHECKLIST

*You've decided to host an event to help you grow your insurance practice. Congratulations! Now what?*

### Six Weeks Prior through Invitations Mailed

Determine target market.  
Determine content of presentation based on selected target market.  
Select venue and call for availability.  
Finalize date and time with venue.  
Select marketing method for event and get materials approved.\*  
(i.e. - vendor for invitations, promotions on radio show, etc)  
Invites should be received by guests approximately 10 days before the event.

### Date Invite Mailed through Day Before Event

Secure equipment rental. (Projector, Laptop, Screen, and Microphone, if needed)  
Confirm staffing for the event. (Greeter for registration table and appointment setter)  
Personally invite a handful of existing clients and invite them to bring a referral as well.<sup>1</sup>  
Make confirmation calls 1-2 days before the event.<sup>2</sup>  
Finalize menu and confirm attendance numbers with venue.  
Solidify room layout.<sup>3</sup>  
Rehearse presentation.  
Keep an eye on your number of RSVPs.  
Prepare nametags, handouts/packets.\*

## PRE-PLANNING TIPS

<sup>1</sup> You may even think about asking one of these clients who attend to introduce you. For example, they can start with something like this: *"Hi and welcome. My name is [client's name]. I'd like to introduce you to a [man/woman] who has helped me get on a stronger path for retirement. Please welcome your speaker for the evening, [agent name]."* It doesn't have to be anything long and drawn out. The purpose is to help the audience personally connect with someone who is already working with you. It's an easy way to make a big statement right out of the gate.

<sup>2</sup> By making confirmation calls to those who RSVPed, you can help combat the typical 10-20% no-show rate.

<sup>3</sup> Half round tables are recommended if available and space allows.

\* Producers should follow the applicable state requirements and approval requirements of the carriers they represent and their broker/dealer and registered investment adviser, if applicable.

## SEMINAR TIMELINE: DAY OF SEMINAR CHECKLIST

*Before you head to your next big event, be sure you have everything you need to help you pull off a successful seminar.*

### What to Bring

Two copies of RSVP/Attendee List for registration check-in  
 Pre-printed name tags plus extra blank ones and a marker  
 Pencils/Pens for each attendee at each table  
 Laptop with PowerPoint loaded (bring a backup of the presentation on a USB drive or CD)  
 Power strip for laptop/projector & extension cords  
 Projector and remote  
 (if not renting through your venue)  
 Projection screen  
 (if not renting through your venue)  
 Sound equipment (if applicable and not renting through your venue)  
 Handouts/Packets with Seminar Evaluation Forms included\*  
 Giveaways, if applicable\*\*  
 Signage for venue

### Event Space Preparation

#### Room Set Up

Upon arrival, adjust the room temperature if necessary.  
 Ensure proper seating available for guests so there are no backs to the presenter.<sup>5</sup>  
 Screen is properly located and set-up.<sup>6</sup>  
 Set up Projector & Laptop. Test PowerPoint to ensure everything is working properly.  
 Sound system (if applicable) is set up and tested.  
 Room lighting is adjusted so that slides can be seen, the speaker is illuminated.

#### Sign-In Table

Set up table to greet guests and distribute handouts/packets.  
 As they arrive, greet guests: *"We're delighted to have you with us."* Present any materials as well as their nametag before welcoming them to select a seat.  
 Capture name/contact information for any referrals that attend.

## DAY OF SEMINAR TIPS

<sup>5</sup> Reserve a few seats close to the door for any latecomers.

<sup>6</sup> Try setting up the screen to the side at the front of the room so you and/or the presenter do not have to walk back and forth in front of the projector during the presentation.

\* Producers should follow the approval requirements of the carriers they represent and their broker/dealer and registered investment adviser, if applicable.

\*\* Various state insurance regulations, as well as other state regulators, prohibit the "gifting" of items in excess of a certain dollar value. Be sure to check your state's requirements and/or your firm to ensure that you are complying with your specific state's requirements and guidelines.

## SEMINAR TIMELINE: AFTER THE EVENT CHECKLIST

*Your event has concluded and now you are back in the office. What do you do?*

### Make the Most of Your Respondents

Call those who attended and confirm scheduled appointments.

Mail a confirmation letter to each attendee who scheduled an appointment.

Call those who RSVPed and did not attend the event.

Mail letters to your "no-show" list whom you are unable to reach via phone.

Call those who attended but did not set appointments.

Mail letters to those whom you were unable to reach via phone.

Send thank you cards to clients who attended showing your appreciation for their support and also for bringing any referrals.

### Assess Your Event

**Introspection.** Talk with others on your team about how the event went and thoughts about the venue:

- Was it easy for people to find both the venue as well as the room for the event?
- How was the service team?
- Was it easy for people to hear the speaker in the room?

**Seminar Summary and Return on Investment (ROI).\*** Go through the seminar summary and ROI form. This not only allows you to look at the potential return for your insurance business, but also serves as a great piece to refer back to for future events.

Keep in mind, each state has different limitations on acceptable levels of gift and entertainment giving and other activities, with several of those limits being as low as an annual aggregate value of zero dollars. Each state may also define gifting, rebating and inducements differently. Be sure to check the laws and regulations of each state in which you do business to ensure you are in compliance with the specific requirements of those states.

\* ROI based on total seminar expenses and potential insurance business uncovered.



## IT ALL COMES DOWN TO THIS: SEMINAR APPOINTMENT SETTING!

*You've made a huge investment in public seminars and now find that you're wrapping up the presentation to potentially 30-40 new prospects attending your event. It all comes down to this...the moment of truth: Can you set appointments that will stick? We believe you can if you follow these appointment setting strategies.*



### PRESENT APPOINTMENTS AS OPPORTUNITIES

When it comes to appointment setting, there are a number of different approaches. One we particularly find effective is an approach that positions the appointment as an opportunity. Consider this sample language as a starting point to craft a message which can be interjected at various points throughout your presentation:

#### **Example 1: Opportunity for a Financial Review**

*Agent: Ladies and gentlemen, thank you for attending today's event. The information we share today will provide you with an important overview of [list seminar topics]. At the end of today's workshop, we will be offering an opportunity for you to come in for a financial review to discuss how various insurance products can help you address your specific concerns in more detail. There is no obligation for you to participate in this one-on-one private meeting. We hope you will view it as an investment in your future. If we can help you, we will.*

#### **Example 2: Is It Worth An Hour of Your Time...?**

*Agent: Ladies and gentlemen, is it worth an hour of your time to see if your existing retirement income strategy will last throughout your retirement years? Will your current strategy help you address inflation? Have you positioned your retirement savings effectively? Tonight, we are offering an opportunity for you to review your current retirement income strategy to see whether you're on track to live the lifestyle you want and provide for the people you care about. Together, we can explore how various insurance products can help you meet your specific financial goals in retirement and beyond. I've set aside time to meet specifically with guests from tonight's event. I want to serve as a resource for you. Is it worth just an hour of your time to get a second opinion?*

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### Example 3: Procrastinating About A Financial Decision

*Agent: Ladies and gentlemen, my hope is that there was something in my invitation that piqued your curiosity. Maybe you want to become more informed about today's topic and, if so, I commend you for taking the time to become more educated. You may find yourselves here because you keep procrastinating about a financial decision that has been avoided. Tonight, regardless of your reason for joining us, we're giving you an opportunity to address the concerns that are most relevant to you. Is it worth an hour of your time to begin exploring how various insurance products can provide possible solutions for you? If so, let's schedule a time to personally meet. I've carved out time in my calendar to meet specifically with people from tonight's event. I hope you will take advantage of this second opinion and this opportunity to talk through your questions. There is no obligation for you to participate in this meeting. If we can help you, we will.*

### Use An Evaluation Form

Use an evaluation form that the prospects can reference and follow throughout your presentation. Ask the audience to check off the topics on the evaluation form that are most important to them. When it comes time to set the appointment, this evaluation form will help make it easy for you or your assistant to address their specific concerns. Here is some sample language:

*Agent/Assistant: Mr. and Mrs. Smith, I see that you are concerned with creating more monthly income for your retirement [or outliving your retirement savings, tax advantaged strategies, etc]. Would you have one hour next Tuesday or Wednesday to set up a time to meet and talk through your questions?*

### Are Spouses On The Same Page?

Have each spouse fill out a separate evaluation form. Use their individual responses as leverage to set the appointment. For example:

*Agent/Assistant: Mrs. Smith, I noticed that you and Mr. Smith selected different areas of concern on your evaluation form. It's important that you both are on the same page and working toward common financial goals. My office is designed to be a nonthreatening, objective environment where you can both openly discuss your finances. Can we schedule time next week? What works best for you both, next Thursday or Friday?*

### Practice Your Call to Action

Many producers spend hours memorizing their slides and perfecting their presentation but only minutes thinking about their call to action — be thee not so shortsighted! Have a game plan for scheduling appointments and then practice, practice, practice what you will say.




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*“Have each spouse fill out a separate evaluation form. Use their individual responses as leverage to set the appointment.”*

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## SAMPLE ATTENDEE SURVEY / EVALUATION FORM

Please take a moment to complete this survey.

PRINT your name \_\_\_\_\_  
 Spouse's name \_\_\_\_\_  
 Phone (day) \_\_\_\_\_ (evening) \_\_\_\_\_  
 Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 E-mail address \_\_\_\_\_

### I HAVE QUESTIONS

I am concerned about or want more information about: ( Check all that apply. )

Retirement Planning Strategies  
 Beneficiary Reviews  
 Wealth Protection Strategies  
 Estate Tax Reduction Strategies

Potentially Reducing Taxes on Social Security Benefits  
 Life Insurance Review  
 Long-Term Care Insurance (LTCi)  
 College Funding Strategies

### LET'S DISCUSS YOUR SPECIFIC CONCERNS IN MORE DETAIL

YES! It's worth 60 minutes of my time for a **no-obligation** review of my current financial strategy and explore how various insurance products may help meet my financial goals and retirement income needs.

If you check "YES," we will call you to schedule your appointment.

( Check your preference. )

BEST DAY				BEST TIME	
<input type="checkbox"/>	Monday	<input type="checkbox"/>	Tuesday	<input type="checkbox"/>	9:00 am - 12 pm (noon)
<input type="checkbox"/>	Wednesday	<input type="checkbox"/>	Thursday	<input type="checkbox"/>	12 pm (noon) - 5:00 pm
<input type="checkbox"/>	Friday	<input type="checkbox"/>		<input type="checkbox"/>	5:00 pm - 7:00 pm

I'd like a speaker to present for my group (civic organization, church, book club, company, etc.)

Please contact me. Group type \_\_\_\_\_

( We will call you for contact information. )

### THANK YOU. WE APPRECIATE YOUR FEEDBACK!

Please note that the presenter can provide information, but not give tax, legal or Social Security advice. Consumers should seek guidance from their tax advisor, attorney or the Social Security Administration regarding their particular situation.

By providing your contact information, you may be contacted regarding the purchase of insurance products.

Not approved, endorsed or authorized by the Social Security Administration or any other U.S. governmental agency.

[BD/RIA disclosure, if applicable]

## SAMPLE SEMINAR PHONE SCRIPTS

### CONFIRMATION

*Confirmation calls can help combat a typical 10-20% no-show rate.*

My name is [Agent/Assistant Name] and I am calling to confirm that we have [# of seats] reserved for you at our upcoming event on [Date] at [Location].

Let me email you the directions and menu for our upcoming event.

What email would you like me to send that information to?

See you very soon!

### NO APPOINTMENT SCHEDULED

*Be sure to call anyone who attended the event but didn't set an appointment. There may still be an opportunity to earn a new client.*

Thank you for attending our event [Date of Event] at [Location]. We appreciate your time.

Based on your evaluation form, you expressed an interest in [refer to topics they checked on their evaluation form]. I'd like to discuss how these topics might impact you specifically and how various insurance products may help you reach your financial goals in retirement and beyond.

Would next [Day/Date] work for you to schedule a time to meet?

### NO-SHOW

*No-shows at your event can still be converted to clients. Invite each of them to a future event and/or ask to meet them one-on-one.*

We are sorry we weren't able to meet you at our event last night at [Location]. You were missed!

We have another event scheduled for [Date]. Would you like me to add you to the guest list?

[If no or unable to attend]  
I'd like to offer you the same opportunity we provided last night's guests, a personal financial review to evaluate your retirement income needs.

When it comes to retirement income, we've found that many individuals need help finding additional sources of income and determining which retirement assets they should consider tapping first from a tax-efficiency perspective.

Would you like to schedule a time to explore how fixed annuities can help you meet your retirement income needs and also examine tax-efficient income distribution strategies?

## SEMINAR SUMMARY AND ROI FORM

*It's time to wrap up your seminar campaign and track the results!*

Seminar Date \_\_\_\_\_ Seminar Location \_\_\_\_\_

### MARKETING METHOD

*(Invitations, Flyers, Newspaper Advertising, etc.)*

Method Used \_\_\_\_\_

Vendor Used (if applicable) \_\_\_\_\_

Quantity of mailers/flyers/newspaper circulation \_\_\_\_\_

### RESPONSES

Total # of RSVPs \_\_\_\_\_

# of Attendees \_\_\_\_\_ # of Buying Units \_\_\_\_\_

Appointments Scheduled at Seminar \_\_\_\_\_

Appointments Scheduled Through Event Follow-up \_\_\_\_\_

Total Appointments Held \_\_\_\_\_

### EXPENSES

Marketing \$ \_\_\_\_\_ Meal \$ \_\_\_\_\_ Other \$ \_\_\_\_\_ Total Cost \$ \_\_\_\_\_

### PROSPECTS/NEW BUSINESS OPPORTUNITIES

Name of Prospects \_\_\_\_\_ Potential Business Uncovered \_\_\_\_\_

_____	_____
_____	_____
_____	_____
_____	_____
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_____	_____
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