The Keys to Absolutely Crushing It with Seminar Marketing

REAL WINS

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*GOOD NEWS. THE PROBLEM IS **YOU**.*

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**Rule 206(4)-1(a)(1) of the Investment Advisers Act prohibits the use of client "testimonials" in an advisor's advertising. Thus, investment advisors are strongly encouraged to obtain interpretive guidance and pre-approval from the broker-dealer or Registered Investment Advisors with which they may be affiliated before using client stories or antidotes as part of their presentation.

Sharing of client stories can be a very powerful communication technique. That said, there are some important reminders to consider in an effort to remain compliant:

1. Do not use clients' actual names (or full) names. Client anonymity should be maintained at all times.
2. Be sure to state the experience of one individual may not be the experience of another.
3. Do not use client stories that discuss financial success as a result of working with a producer.

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PREFACE

Allow me to get at this quickly. This book *may* not be for you.

The resource you are holding contains the aggregate experiences and learning from my 15 years of studying the habits of the most successful advisors in the financial services industry. It includes highly revealing data from extensive research about the buying motives of today's financial services consumer. It is perhaps *the* single most comprehensive, in-depth guide to maximizing one of *the* most powerful prospecting strategies used today.

And yet, it may not be for you.

Here's why — this book presupposes you:

- Exist in the financial services field because of an underlying desire to help others
- Maintain the highest moral and ethical standards for yourself and your team
- Have genuine intentions of bringing exceptional value to every new client you serve
- Would never sacrifice a client's best interest in pursuit of your own
- Seek excellence in all that you do as an independent advisor

If those statements do *not* describe you, then, simply put, I don't aim to help you. While the pages that follow may bring a number of improvements to your seminar and business, I am fundamentally opposed to furthering your cause and would prefer you set down this text. You are not the target reader for whom this resource was designed.

I AIM TO HELP THE HELPER.

Ours is an industry brimming with opportunity for the independent financial advisor. While marketplaces have certainly become crowded, it is my firm contention they have generally been congested by mediocrity. From the large box stores offering impersonal, canned "solutions" to advisors piecemealing product transactions, to the few bad apples who simply have their own pockets in mind, the bar for excellence and integrity in our industry has historically been set very low. It is not my intent to help those who swim in this end of the pool.

So, if you just grabbed this book looking for the next great "spiel," "no-fail closing script" or way to bait and switch "buying units" at your next seminar, please keep moving. This isn't the resource for you. Candidly, I would prefer you occupy a post on a used car lot and clear the way for those with *genuine* intent to improve others' lives.

That said, if you *are* the type of financial services professional I have described — one whose core motivation isn't mere *affluence* but instead *influence* in the lives of those you serve, I am grateful you are here. There is much ahead for you. In this book, you will find the results of groundbreaking research — conducted directly in the field — as to the likes, dislikes, concerns, motivations, priorities and preferences of today's retirees.

This extensive data was obtained over roughly 20 months by traveling to the offices and events of more than 100 advisors — surveying some 3,000 of their actual attendees.

Prior to the publication of *Real Wins*, there has never been such in-depth research conceived and conducted by an independent marketing organization on behalf of its advisors to help them better reach, speak to and serve their target market.

You will get inside access to the factual results of this study, learning:

- What *actually* attracts consumers to financial seminars
- Which topics resonate best and which put an audience to sleep
- What today's consumer is really looking for in a financial advisor
- Which presentation styles are magnetic and which ones subconsciously repel business
- What ultimately causes the majority of seminar attendees to set appointments with advisors
- What prevents those who don't from wanting to move forward

Beyond the survey data, you will also acquire dozens of best practices from the most effective seminar advisors around the country, learning:

- Key metrics you must measure in order to monitor success
- Venue-vetting procedures to ensure your money is wisely spent
- Invitation secrets and RSVP protocol to help ensure events are packed
- Key on-site logistics to make sure your event runs smoothly
- Storytelling techniques to instantly differentiate you from all others in your market and engage your audience like no other

- Critical strategies for making PowerPoint and other visual aids come to life
- Sample analogies to aid in simplifying complex financial concepts
- Key communication differences in speaking to today's boomer consumer
- Step-by-step approaches for converting attendees into appointments and ensuring those appointments stick

In your hands, you hold a resource of immense value and great power. It is not an overstatement, as you will soon see, to suggest this book alone can radically transform your prospecting and, thus, your business and life. In return, I make one simple request: Please employ the practices and principles contained herein for the benefit of others. If you are the correct blood type for this book, you long ago realized "It is more blessed to give than to receive," and, by caring deeply and authentically for the needs of your clients, you will always be abundantly provided for in return.

CHAPTER 1

A LESSON IN SETTLING FOR LESS

WHY EVEN THE BEST CAN GET SO MUCH BETTER

Sitting in the terminal at Kansas City International that brisk morning, the Starbucks caramel macchiato really wasn't all that necessary. I didn't need a manufactured jolt that day. Instead, I had awakened already inspired.

Neither the Disney-bound family in front of me who took a virtual eternity getting carry-ons through TSA nor the handsy newlyweds now sitting across from me at the gate could dampen my excitement. In fact, I was almost giddy. Like many of you, I have a strange obsession. Something deeply buried in my soul. I am fascinated by the habits of those who succeed and, that morning, I was hopping a Southwest flight to witness a legend.

Now, to advisors in our industry, "success" is a somewhat relative term. Depending on the pond in which you swim, you might be successful writing $10 million a year in annuities or surpassing $50 million in new assets gathered. Success could be creating a lifestyle practice whereby you generate revenue sufficient to supply your likes, or success could be growing a thriving multi-advisor business. There are as many ways to classify "success" as there were cramped seats on the Boeing 737

that morning, but the producer *I* was going to observe? Not only was he an acclaimed Hall of Fame producer with Advisors Excel, having written well over the requisite $100 million for induction by averaging roughly $35 million in annual production since joining AE, but he also *personally* conducted more seminars each year than any other single advisor I knew.

Some 50-plus nights a year, he took to the stage — generally packing rooms with direct mail so adeptly that a waiting list and overflow events were required. While struggling advisors around the country entertain windshield pamphlets and skywriting to supplement their starving response rates, he often had dozens of fans waiting outside the club hoping to get in. And he spared no expense, opting exclusively for the filet mignon of Ruth's Chris and other comparable venues, with costs per plate that would make most advisors lightheaded.

You can imagine my anticipation as I landed early that afternoon. A quick call to his office confirmed they were primed with yet another packed house. "Sixty-two attendees. Thirty-eight households," his marketing coordinator relayed. "Guests should start rolling in about 6:15 — we'll see you there!" In previous experiences visiting seminars, head counts like that would easily comprise *two* events, so I could not wait to step foot in the restaurant for the big show that evening.

Arriving early to visit with the advisor's team and meticulously note their final preparation, I walked through the doors and was met with Sinatra and the faint scent of fresh-baked ciabatta. Wait staff buzzed around like interior decorators, putting final touches on the room — placing thick, leather-bound menus for the evening just beneath linens masterfully folded like swans. Lighting was set like autumn at dusk; a gorgeous evening awaited guests.

Choosing a discreet spot in the back, I sat and began feverishly taking notes. The advisor's team had arranged a buffet of a registration table, showing off his newly published book and other related PR. Six-foot banner stands stood guard, highlighting his

radio show and media appearances, and a huge canvas at the front of the room cycled a loop of client and advisor photos.

Like clockwork, the first guests began to arrive, and as they did, the team greeted them like foreign diplomats — with a deep smile, a two-handed handshake and a sincere "so glad that you're here." They were handed a name tag, a clutch of information, a notepad and a pen. Roughly 20 minutes later, 56 attendees from 35 households packed the room.

Having seen hundreds of presentations during my years in this industry, I was taken by just how well the ducks had been put on the pond. The vibe in the room was warm, the energy was electric and I'd actually heard *several* guests say things like, "We're excited to hear what he has to say!" That, my friends, does not happen. The pump was properly primed.

At 6:30 p.m. sharp, the presentation began with a brief video introduction of the firm. Five minutes of custom-produced, shot-on-location footage giving the entire room a sense of who the advisor was, why he got into business and what separated his company from others in his space. This was followed by brief housekeeping remarks by his marketing director. The normal bit: Kill the cell phones. Restrooms just around the corner. Food's up by 7:30 p.m. In the meantime, you'll hear from one of the best in the business. She then introduced the advisor, who took the floor at 6:38 p.m.

And by 6:42 p.m., the seminar was over.

Sure, we still technically had *50 minutes* to go, but, if you'd asked anyone in that room, it was finished.

I knew it. Every prospect knew it.

We've all had that sensation before. You see the singer step to the mic for our national anthem, and every shred of your soul prays they'll be the exception who can actually nail the thing. And then? They deliver that first quivering line or sour note, and it's Groundhog Day. Another complete bust.

This particular night, perhaps most dishearteningly to me, I'm certain the advisor knew it, too. Within moments, you could sense a certain resignation had set in, as though four minutes into his own presentation, the initial buzz of a room packed to the gills with intrigued attendees had yet again slipped from his fingers. Politely, albeit somewhat impatiently, 56 attendees (and an observant fan in the back) sat and endured the next hour until salads and steaks could be served.

Now, lest you be left in suspense, the actual results that night? Thirteen appointments set. Thirty-seven percent conversion. And you may be thinking to yourself, "C'mon now. … That's not *that* bad of a night."

But as I sat in the back of that room *knowing* how hard that particular advisor works, *knowing* he shells out well over half a million dollars just in direct mail and venue costs each year, *knowing* his dedication to his practice and *knowing* how genuinely he wants to help people, the thought of him taking off that lapel mic 50 nights a year, walking to his car, and making the 25-minute drive home after experiencing those kinds of results was simply devastating.

While that particular evening could have certainly been a fluke, given what I'd seen, I strongly doubted it. Instead, in my mind, I envisioned the advisor and his team grinding out dozens of similar evenings — sacrificing Little League games and dance recitals, missing date nights and not being able to tuck kiddos into bed only to experience a *tithe* of the results they should have seen.

This was a *Hall of Fame* advisor. A guy who had been conducting seminars for years. An incredibly sharp producer; this was certainly not his first rodeo.

There and then it hit me: With roughly 80 percent of Advisors Excel's producers leveraging seminars as their *mainstay* marketing funnel (together generating BILLIONS in production each year), there could be no greater opportunity as an organization than for

us to dig in and provide real, practical, in-the-trenches support to legitimately raise advisors' game in the seminar arena.

See, here's a little secret: We have a nasty epidemic on our hands in this business — one which, truth be told, insurance marketing organizations (IMOs), broker-dealers and Registered Investment Advisors are collectively responsible for having created. For years, in lieu of *real* value or authentic understanding of how to actually appeal to your prospective clients, lesser organizations have consistently pitched you "turnkey" marketing gimmicks, "A-to-Z" this and thats and "guaranteed" yada yadas, which have done nothing more than temporarily distract everyone from the *real* issue.

Open any trade publication or the 13 emails you already received today, and you'll find exactly what I'm talking about. The following *literally* came across my desk this morning:

- "Does your current IMO hand you 1,000 new leads per month?"
- "Earn 6 figures in 90 days!"
- "Tired of zombie leads? First 50 agents to respond will be zombie-proof!"
- "This 3-minute video made me $100,000 in commissions in less than 60 days!"
- "Call now to generate a never-ending stream of qualified clients!"

You've seen enough of this manure to know I'm not making it up.

What does all this nonsense have in common? It merely placates advisors struggling to legitimately grow their business and reach their goals by handing them some *illusion* of tomorrow's success. It's the equivalent of white-collar payday loans. But you and I both know better. If *any* of these games had ever borne *any* sustainable fruit, you wouldn't be grabbing this book. You

would've long ago hitched your wagon to some zombie-proof lead generation system and ridden off into the post-apocalyptic sunset. It's patronizing. No, it's dumbfounding the way advisors are spoken to in this industry — as though you can be snowed with visions of sugarplums dancing in your heads.

So why, for decades now, have such charades existed? Why have organizations pedaled such gimmicks and why, for the most part, have advisors tolerated it?

Two reasons.

First, from an IMO or broker-dealer level, creating real value is *hard work* — a concept many organizations have neither the inclination nor the resources to pursue. Second, it's often easier to delude ourselves than to look the truth in the eye. The *true* alternative, in the case of effective prospecting, isn't some cute little "system" or some "turnkey package" we can buy. It's not some bottomless lead-generation fountain or cutting-edge marketing approach no one's ever considered. In fact, it's far more novel than any of those things.

After 15 years of extensive research, I'd wager my firstborn on the following conclusion: Those who want to *truly* excel in this industry must … are you ready? … here it comes … **COMMIT TO HONING THEIR CRAFT**.

Now, 20 (maybe 30) percent of you just let out an audible sigh. Perhaps profanity. Because honing one's craft is not for the faint of heart. It's neither easy nor instantaneous. It can't be done *for* you. So, in full disclosure, if that's what you were looking for, you've come to the wrong place. Never fear, though. If temporary, overnight success is what you're after, all is not lost. Your inbox is likely littered with options.

However, for the faithful who remain — the committed, the hungry, the willing — those who've likely tried the genie in a bottle to find it only blows smoke — you are holding something of immeasurable value: A literal guide to transformative growth.

In the pages to follow, we will be changing your underlying assumptions. Altering your mindset. Challenging many of the long-held beliefs that helped you get this far. Why? Because, as Marshall Goldsmith so aptly titled his book, *What Got You Here Won't Get You There.*

Your accomplishments *prior to* opening this book speak to incredible commitment and a desert-like thirst for success. So, let me say before we go any further, that level of passion is unbelievably rare and exceptionally admirable. But, as many of you have found after plateauing for several years in a row, passion alone won't take you higher. Passion fills the rosters of minor league teams all over this country. Passion has populated Hollywood with hopefuls-turned-baristas for decades and led thousands of amazing musicians to Nashville for a big break that never came.

Passion alone won't take you higher; humility to learn from others, a willingness to be coached and an unwavering commitment to excellence will.

Now, fair warning: Where we're headed, the air gets thin and most will not venture. But, unlike short-lived gimmicks, where we're headed is what will ultimately separate *you* from everyone else trying to play the game.

If you turn this corner, here's what awaits you:

1. Painfully straight shooting. (Turns out, the fastest route from A to B really *is* a straight line, so there won't be bubble wrap, participation medals or coddling.)
2. The abandoning of short-sighted thinking.
3. Incredible attention to details, because the devil truly is in them.
4. A renewed focus on your prospect, because they *are* the reason you and I ultimately exist.
5. A relentless focus on the art of communication because, without it, nothing else matters.

You know what you've always dreamt was possible in this business. And you know, at least to some extent, it has eluded you thus far. I assure you, it is yours for the taking. And *if* you will grasp it, you will find yourself experiencing exponentially greater reward without corresponding increases in effort or expense. You'll find yourself capturing an increasing market share with far less fluctuation in your annual business cycles. You will connect with people in ways you never have. And, perhaps most importantly, you will experience a rejuvenated vigor and vitality about your business, rooted in results like you have never seen.

It's yours for the taking. Let's go get it.

CHAPTER 2

OPTICS ARE EVERYTHING

THE KEY SEMINAR NUMBERS YOU MUST BE WATCHING

"I'm just not seeing enough people."

This erroneous belief alone has robbed more advisors of progress than perhaps any other in the business. I don't mean to suggest there isn't a time and place in which a sheer number of "at bats" is critical, because there is. Ask any advisor with more than five years of experience and she or he will tell you, in the early days, every appointment was a vitally important learning opportunity with a *slight* chance for business and, the more of those one experienced, the better. In other words, sheer quantity was key.

The danger, though, sets in when we take the archaic thinking of the cold calling, captive structure in which many advisors cut their teeth and we apply it to present-day business strategies. Most of us were told (repeatedly) early on that "this business is just a numbers game," and "you just have to step to the plate a bunch of times." That *truth* in one setting becomes a *toxic deceit* in another, particularly when it becomes permission you give yourself to not improve.

The reality in 99 percent of the scenarios I coach is this: **YOU DON'T NEED TO SEE MORE PEOPLE — YOU NEED TO BE**

MORE EFFECTIVE WITH THE PEOPLE YOU ALREADY SEE.

Now, I know a few of you just got your backs up and are a little out of sorts, so don't wrestle with *me* on this — let's look at the raw data.

THE TYPICAL ADVISOR'S SEMINAR DATA

In an extensive study of dozens of seminars presented by Advisors Excel producers, I found, when these producers peeled back the veneer and got *real* about their numbers, the *average* seminar scenario looked like this, with the typical advisor:

- Running 20 individual seminars per year (or 10 "rounds")
- Seeing an average of 14 households per seminar, for a total of 280 households annually
- Converting 42% of the rooms to appointments, for a total of 118 households booked annually
- Seeing a stick rate of 76%, for a total of 89 households that actually attended first appointments
- Closing 31% of prospects who actually enter the sales process, for a total of 28 new clients annually
- Averaging a new client size of $221,000
- Totaling roughly $6.1 million in annual seminar production

For illustrative purposes, assuming an advisor recommended a simple 50/50 split between assets under management (AUM) at a 1 percent fee and annuities at a commission of 7 percent, the average advisor's seminar funnel would have generated $244,925 in annual revenue.

(NOTE: For a handy calculator allowing you to instantly tabulate your own specific seminar results and profitability, go to

www.realwinsmaterials.com and grab the Seminar Enhancements Calculator.)

Seminar Enhancements Calculator

Seminars per year	20			
Avg. households in attendance	14		280 Total households seen annually	
Avg. appointment conversion	42.00%		118 Households booked annually	
Stick Rate	76.00%		89 Households met with annually	
Closing rate	31.00%		28 New clients closed annually	
Avg. new client size	$221,000.00		$6,123,150 Total seminar production	
Compensation mix	Annuity	50.00%	AUM	50.00%
Annuity compensation	7.00%	$214,310.24		
AUM compensation	1.00%	$30,615.75		
		$244,925.99		

What do *many* advisors do when looking at such analytics? With seminars being their primary prospecting workhorse, they simply determine they need to run more of them. Translation? "I need to see more people."

However, a slightly more studious producer pauses to look at the return on investment of the marketing funnel — calculating the average cost of a seminar (say $8,000), multiplying it by the 20 events hosted (i.e., $160,000) and ultimately concluding that, at $244,925 in annual revenue, they're not even seeing 2:1 ROI on the marketing investment.

(At this point, one of two things generally occurs: excessive drinking or abandoning seminar marketing altogether. Neither are necessary or particularly productive.)

WHAT IF FAR MORE WAS AVAILABLE?

Lest we paint with broad brushstrokes, what if we actually looked at what the analytics were *really* telling us? Remember, if you get nothing else from this book, you must retain this: 99

percent of the time, you don't need to see more people — you need to be more effective with the people you already see.

Let's take a minute and see what's actually hiding in these numbers.

HOUSEHOLDS IN ATTENDANCE

Households in attendance per seminar reflect the effectiveness of your invitation mechanism (often a combination of direct mail, RSVP and reminder services, inviting a few existing clients and their friends, and perhaps some radio or social media marketing). The national average in attending households hovers around 16, so if you're falling consistently well below that number, there are likely enhancements you can make (which we'll cover in great depth a little later).

Households in attendance should *not* be a concern of the *advisor* — overseeing these should be a chief responsibility of a dedicated marketing coordinator or director. Guns N' Roses and Garth Brooks don't go around booking their own shows. They rock arenas. That said, the music industry's top artists often pay top-shelf personal managers north of 10 percent of their gross income, so don't just hire your brother's cousin's nephew and *call* him a marketing director. He's not one.

CONVERSION RATES

Conversion rates at your events reflect the prospect's *entire* experience and the perception they form of you and your firm. All too often, I hear advisors' marketing directors attribute mediocre conversion rates to a lackluster presentation or an "off crowd" on a given night. The truth is, a successful or unsuccessful conversion begins the moment a prospect *first* sees or hears about your company — whether they're driving by your building, hearing about you from a friend, grabbing your invitation from the mailbox or listening to your radio show on Saturday mornings.

The game doesn't *begin* when they walk into Flemings that night — by then, you're often already at halftime. By then, dozens, if not hundreds, of impressions have already been made.

Let's take a seemingly unrelated industry and put it under the microscope for a minute. Consider car tires. A new set of four average-quality tires can range from $550 to $725 — a significant "bite" in the pocket of the average blue-collar consumer. Fortunately, most Americans can get four to five years out of a set before needing to replace them. What does this have to do with anything? It has everything to do with the *marketing* efforts of major tire manufacturers like Goodyear, Michelin and Bridgestone. In 2016, Michelin's global media spend was $100 million. Why does an already-leading tire manufacturer spend such ridiculous marketing money? Similarly, what makes one of their chief competitors — Goodyear — fork over an ungodly budget every year for the past two decades to be considered the "official tire of NASCAR?"

The exact reason we've already covered. They do this for eyeballs. When the public needs Goodyear's mainstream product — a 60,000-mile all-season radial for a Honda Accord — they're only buying those puppies once every five years, and they have their choice of at least a dozen other reputable tire manufacturers from which to choose. So, come the day of *that* $700 purchase, name recognition, top-of-mind awareness and every prior impression Goodyear has made on you and me absolutely matters.

The same is true of you and your firm.

Conversion at your seminars is all too often thought to be the byproduct of a great presentation or a clever close when, in fact, it's the sum total of a hundred or more impressions accumulated over time. So please, don't underestimate the importance of *every* impression.

In my travels visiting AE's producers, I've seen conversion percentages at events that range from 14–95 percent. From the more novice to the legendary presenter, closing rates run the

gamut. But what's most notable (and dangerous) here is the range that has become an *accepted norm* for many firms. For many producers around the country, closing 40–50 percent of the room has somehow become "a pretty good night." Hear me clearly here: There is nothing "wrong" with closing half of the room on your way to something greater, but to *remain* there contently? That completely belies the excellence within you, and you grabbed this book for a reason. You seek more, and I assure you, much more is possible.

YOU ARE BETTER THAN A HALL OF FAME ATHLETE

Ty Cobb, who played until 1928, has the highest batting average in Major League Baseball (MLB) history, hitting .366 over an impressive 24 seasons. Seven-time champion Steve Kerr holds the record for highest 3-point shooting percentage in the NBA, finishing his career at 45.4 percent from behind the arc. Of NFL quarterbacks with at least 2,500 completions under their belts, Drew Brees holds the highest career completion percentage at 66.6 percent.

Connecting 37–67 percent of the time may put you in the Hall of Fame in various professional sports, but in Advisors Excel's hallowed halls, the real pros play at a much higher level, and you are fully capable of the same. It's not uncommon to see our *top* producers closing over 80 percent of their audience at seminars. That may feel like a stretch from your present reality, but what would a simple 25 percent increase in your conversion rate do to your annual profitability? Let's look.

AVERAGE CONVERSION RATE:

- Running 20 individual seminars per year
- Seeing an average of 14 households per seminar
- Converting 42% of a room to appointments

- Seeing a stick rate of 76% attending first appointments
- Closing 31% of those prospects who actually enter the sales process
- Average new client size of $221,000
- Total of $6,123,150 in annual seminar production
- Anticipated revenue of $244,925

IMPROVED CONVERSION RATE:

- Running 20 individual seminars per year
- Seeing an average of 14 households per seminar
- Converting **67%** of a room to appointments
- Seeing a stick rate of 76% attending first appointments
- Closing 31% of those prospects who actually enter the sales process
- Average new client size of $221,000
- Total of **$9,767,882** in annual seminar production
- Anticipated revenue of **$390,715**

(Over the course of the next 10 years alone, that little improvement equates to another $1,457,900 in revenue for your firm. Over 15 years, it's $2.18 million.)

Notice the *only* variable that changed in this comparison was your conversion rate. A simple increase of 25 percent in your closing rate at events leads to a 59 ½ percent increase in revenue, and here's the kicker: You haven't spent an additional dime on marketing or additional events. (Show me another industry in which you can increase revenue more than 59 percent without increasing *any* expenses, and I'll cover the cost of your next 10 events.) But let's dig further. . . .

STICK RATES

Heads up: If you are not currently tracking your stick rate — i.e., the percentage of those prospects who actually show up for the first appointments they scheduled at your seminars — you *must* start immediately. Untracked stick rates are The Great Deceiver of far too many hard-working firms, and their toll can be devastating.

Case in point: One of the advisors I visited last year was doing a great job of tracking conversion rates at each event and, at the time of my visit, he was averaging a 61 percent conversion rate for the year. Not too shabby by most advisors' standards.

But when asked about his stick rate, he somewhat blew off the question, replying, "Oh, if we get them scheduled at the seminar, we got 'em. We don't see much drop-off at all." Yet, when I circled back with his marketing director later that afternoon, she told me that they hadn't *ever* tracked that number, but that she was sure it left much to be desired.

I asked the firm to track their stick rates for their next three events to give us a baseline, and the results were nothing short of jaw dropping. On average, they were seeing 52 percent of their scheduled appointments stick while 48 percent either no-showed or perpetually rescheduled into the deep abyss. In other words, they were *actually* meeting with 52 percent of the 61 percent they originally scheduled. (Math isn't my strong suit, so I had to grab a calculator for this, but it turns out 52 percent of 61 percent is *actually* a 32 percent conversion.)

Celebrating conversion rates without paying attention to woeful stick rates is loosely akin to peeing your pants in a blizzard. It may feel good for a second, but soon, a dreadful regret creeps in. All too often, advisors find themselves high-fiving over a solid night's conversion at their events only to see literally half of those first appointments not show. That isn't success. In this advisor's case, it was only a 32 percent conversion when it was all said and

done. Even grading on the curve, he's flunking. *(Take heart, though. We'll be covering remedies to suffering stick rates throughout the next several chapters, culminating in Chapter 13.)*

CLOSING RATES & AVERAGE NEW CLIENT SIZE

Much like conversion rates, closing rates in appointments and average new client sizes vary greatly by producer. What *doesn't* fluctuate office to office is the need to keep an airtight record of those stats for analysis purposes. Having a "gut feel" that you're a 50 percent closer in appointments is a country mile from staring down a monthly sales report that definitively shows you're *actually* closing 28.2 percent. Let's get real here. Many of us shy away from tracking or reviewing data because, well, it doesn't lie. Data is painfully indifferent to our feelings and has no obligation to give us the good news first. Many of us don't bound out of bed in the morning to hop onto that scale in the bathroom, because we know full well that sucker is gonna tell us the truth.

However, it is only by dutifully tracking those numbers that one may know the actual root cause of the pain and stop treating only the symptoms. When we put aside our pride and fear and look at these stats not as a *verdict* but as a *diagnostic*, then we're on the road to freedom. If you're not tracking these variables, start now. (You can grab a Seminar Stats Tracker at **www.realwinsmaterials.com**.)

LITTLE HINGES SWING BIG DOORS

I'll keep beating the drum. With rare exception, you don't need to see more people. You need to be more effective with those you're already seeing. I am now ready to show you mathematical proof. We've already seen what a mild improvement of conversion ratio alone does to your revenue. A 25 percent bump in conversion alone equates to a 59 ½ percent spike in revenue.

But what happens when those enhancements start to trickle downhill? This is perhaps one of the most beautiful things to witness in all of marketing — when the snowball effect begins working in your favor.

Here's what I mean:

- Every time you make a noticeable improvement to your seminar marketing, pre-seminar process or presentation itself, it ultimately improves your stick rates.
- By improving your stick rates, you have more "at bats" with prospects who are *far* more engaged in you and your firm.
- When prospects walk in your doors already primed, your closing rates in appointments begin to soar.
- As you close more appointments with more engaged prospects, your confidence naturally climbs, and most advisors at this point see average new client sizes increase simultaneously.

Ultimately, what begins at the top of the funnel as a simple focus on increased event conversion rates creates results you couldn't fathom. Still don't believe me? Let's look at the exact same scenario once more — this time showing modest improvement in *all* areas. …

AVERAGE ADVISOR SCENARIO:

- Running 20 individual seminars per year
- Seeing an average of 14 households per seminar
- Converting 42% of a room to appointments
- Seeing a stick rate of 76%

- Closing 31% of those prospects who actually entered the sales process
- Average new client size of $221,000
- Total of $6,123,150 in annual seminar production
- Anticipated revenue of $244,925

MILDLY IMPROVED ADVISOR SCENARIO:

- Running 20 individual seminars per year
- Seeing an average of 14 households per seminar
- Converting **67%** of a room to appointments
- Seeing a stick rate of **81%**
- Closing **36%** of those prospects who actually entered the sales process
- Average new client size of **$250,000**
- Total of **$13,676,040** in annual seminar production
- Anticipated revenue of **$547,042**

First, notice what did *not* happen in the comparison above. You did *not* give up one more night with your spouse or children to run a single additional seminar. You also did not call up the mail house or restaurant and fork over tens of thousands of dollars in additional marketing expenses. In other words, you didn't do what virtually every IMO and mail house in our industry *recommends* you do, having subtly thrown their hands up in the air in lieu of any real expertise to help you. "Just hold more seminars," they say. Get the heck outta here. You know who tells you that? A mail peddler with little marketing acumen who isn't looking out for *your* best interests.

But, in our previous example, you didn't take that advice. You didn't dig into your pockets, mail more or host more events. What *did* happen, however, is you literally *doubled* your production and

revenue by simply making modest, perfectly achievable enhancements in the areas that ultimately drive your success.

Let that sink in for just a second. What would your life look like next year with an additional $300,000 in revenue flowing in from seminars alone? (If you are running more events than our hypotheticals or seeing higher net worth clientele than we've illustrated, plug your OWN numbers into the Seminar Enhancements Calculator and consider the impact.) What would *that* level of increased success mean to you? Imagine what that could feel like. Hundreds of thousands in additional revenue without an additional *dime* flowing out of your business in added expense. Whether that means increased revenue to invest back into your company or money that opens new opportunities for your children or savings that creates "someday money" for your own financial future. … *Imagine* what that will feel like.

This is why I am so ridiculously passionate about this stuff: Because we are blessed to operate in a space in which success and freedom and legitimate life change like this aren't limited to the *imagination* — they can be *realized* — all while providing life-changing help to the clients we serve. Time and time again for the advisors we coach, that's exactly what happens.

WE ARE NOT TALKING ABOUT PIPE DREAMS

I recently walked into the gorgeous, newly remodeled office of a close friend and Hall of Fame advisor in the Midwest. He and his team gathered around the boardroom table and laid their numbers bare. For the 12 months prior, they had hosted 21 events and converted an average of 37 percent of their attendees into appointments.

After seeing his team's seminar that night, we gathered again the next day for a few hours and strategically walked through every facet of their event, noting every opportunity to improve first impressions, enhance engagement with attendees, simplify

seminar content, solidify the close and ultimately add steroids to what they were already doing well. At the conclusion of that huddle, everyone had a clear understanding of exactly what we would do as a team over the next three months to impact results.

Sixty-two days later, I opened the following email from the advisor's marketing assistant:

"Hey Josh!

"Hope you are doing well! Just wanted to drop you a note to let you know we had our first 100 percent appointment conversion event last night! Woo-hoo! Hoping that this is the first of many! Thanks a ton!"

In just over two months, this advisor and his team — committed to honing their craft — nearly tripled their conversion rate. No additional marketing. No additional events. No additional expense. Just radical levels of improvement that come when you realize **YOU DON'T NEED TO SEE MORE PEOPLE — YOU NEED TO BE MORE EFFECTIVE WITH THE PEOPLE YOU ALREADY SEE.**

If you're ready to dig into the how, let's get tactical.

TO-DOS:

- Download the Seminar Enhancements Calculator from **www.realwinsmaterials.com**

- Plug your last year's seminar numbers into it, and calculate the ridiculous opportunity at hand with just a few key improvements. (Then, pick your jaw up off the ground.) Download the Seminar Stats Tracker from **www.realwinsmaterials.com**

- Immediately begin religiously tracking the costs of filling every event, households in attendance, conversion rates at

each event, stick rate of those appointments, closing rate of prospects walking in the door, size of average new client onboarded and their approximate asset allocations.

CHAPTER 3

DON'T LOSE BEFORE YOU START

GETTING FUNDAMENTALS RIGHT EARLY IN YOUR SEMINAR PLANNING

A plane headed from Los Angeles to LaGuardia in NYC, if off in its initial trajectory by just 6 degrees, will land at Miami International. The lesson? Getting simple things right very early on matters. In the vast majority of struggling seminars I have seen, the results could have been impacted — some of them dramatically — with some key adjustments at the outset of planning. Let's look at a few.

TRUST THE DATA

As you begin calendaring your events for the coming year, I encourage you to embrace wisdom my grandfather shared when I was a kid: "Smart folks learn on somebody else's dime." This couldn't be more applicable than in seminar marketing (it's essentially the basis of this book), and when it comes to the ideal start times and days of the week to host your events, you have the benefit of tens of thousands of advisors having gone before you — some nailing it and some flopping horribly. The beauty for you is that a few of the industry's preeminent mail houses have been

tracking this data for roughly 20 years now, watching what has worked and what hasn't, and the results are definitive. If you want optimal results for a dinner seminar, schedule it on a Tuesday or Thursday evening with a start time between 6 and 6:30 p.m.

Are there niche markets with certain nuances that *may* yield different results? Of course.

For instance, The Villages — "America's Premier Active Adult Retirement Community" — in Central Florida has its residents conditioned to participate in a host of mid-afternoon activities, from water aerobics and bocce ball to wine tastings and workshops. Thus, an advisor hosting a 6:30 p.m. seminar at their clubhouse may actually see *diminished* attendance, whereas that same event held at the conventional 2:30 p.m. activity time may be filled to the brim.

Various retirement communities in other areas around the country may be similar, but be very cautious here. Unless you are staring at a pile of data that details a community's attendance habits for events like yours, be very careful about "just trying a thing." Too many well-meaning marketing directors try to crack new markets with "clever" approaches using untested times and days of the week only to be sitting at those events with an audience of three: themselves, the presenting advisor and Wanda, the lone "prospect" who accidentally wandered in thinking she was there for an online identity theft conference. Unless you're just a fan of $6,000-to-$8,000 beta tests, trust the data.

(NOTE: Be mindful of lesser-known religious and ethnic holidays when planning your annual seminar calendar. For a full list of these and other dates to plan around, visit **www.realwinsmaterials.com.**)

VET YOUR VENUES

When is a minute worth $267? When you don't spend 30 of them to properly scout out your seminar venue. Time and time

again in my consulting travels to top advisors' offices, this is an area given little attention and, on the surface, I completely understand why. As an advisor and sole proprietor, you have a virtually limitless number of demands on your time. Particularly in your early years, everything from the coffee pot to payroll is your problem, so I certainly understand why, in many cases, venue vetting slips down the list. However, few marketing mistakes could be more costly.

Imagine a bride and her mother tending to the thousands of details surrounding a wedding — the invitations, dresses, floral arrangements, music selections, choice of cake, the guest list, the wedding party — the list goes on and on. Now, imagine that same bride arriving on her wedding day having never actually seen the inside of the church in which she was to be married or the reception hall in which her banquet was to be held. *Unimaginable*, right?

And yet? The same often happens multiple times throughout the year with advisors wanting to try exciting new venues that open to rave reviews in their markets. In their hurry to book restaurants that seem all the rage, producers and their marketing directors often blitz right past a half hour of due diligence that could have saved them horrendous experiences. See if any of these *actual* stories sound familiar:

- A new steakhouse in the Northeast, aiming to deliver a seminar guest his requested "medium rare," served up a filet frozen in the center.
- An evening at a newly opened Italian restaurant in Chicago got heated as two wait staff, jockeying over a large party, broke into a shoving match.
- Music from the neighboring karaoke bar made it impossible for attendees to hear the presentation at a chic new Kobe steakhouse in Nevada. *(It was 80's night.)*

- 37 guests at a seminar in Indiana grumbled impatiently for over a half hour as the *sole* server dedicated to their event scrambled to dish out entrees.
- An advisor in Dallas spent nearly $9,000 on a seminar only to have 80% of his attendees unable to see him as they sat behind ornate draperies.

In every instance, strategic snooping around in advance would have paid dividends; where your next seminar is concerned, thorough vetting before *ever* inking an agreement with a venue is an absolute must.

During a visit to one of our top producers this past year, I pulled up to find his event taking place at a *gorgeous* new privately-owned steakhouse. Picture vintage Louis Vuitton booths, rustic bronze chandeliers, ornate tumbled brickwork and entire walls featuring aged whiskeys and bourbons. Checking in at the hostess stand, I was told the advisor and his team were dining at the bar, so, after a quick perusing of the venue's layout, I headed over.

They gave me the scoop for the evening — the order of events, general timing, anticipated headcount, etc. I then asked, "So where, exactly, is the presentation room? I didn't see it as I walked through the place."

The advisor then replied, "I think it's toward the back somewhere. I've never been here before."

Somewhat taken aback, I looked over to his director of events, asking her, "This is the *first* event you've had here?"

Without hesitation, she responded, "Yeah — isn't this place beautiful? We got in here about an hour ago to get a look around for the first time and get everything set up. Our room is in the back, and I think it's gonna be great!"

I almost choked on my drink. That, my friends, is a roll of the dice I simply do not recommend. Short of arranged marriage, there are few more disappointing moments than showing up to your seminar to realize you are *100 percent stuck* with a

presentation room you can do nothing about. In this particular instance, here is how it played out:

- The room, while truly stunning, was clearly engineered for entertaining *dining* guests — not *seminar attendees.*
- Space that could have comfortably seated 50 was strained to accommodate an overwhelming 62 attendees. *(We'll discuss this later, but in some cases, more is absolutely less.)*
- Tables, chairs and guests were wedged so tightly that wait staff could hardly navigate the room.
- 20 of the 62 attendees (i.e., 32%) were placed in booths flanking the sides of the room with floor-to-ceiling curtains separating them, making it impossible for those attendees to even see the presentation.
- With the room packed so tightly with people, the advisor was left with a roughly 6-foot swath of space on an awkwardly raised presentation stage — leaving him looking directly down on the audience (like a king over his subjects) with no ability to move amongst them.
- Banter and clanging from the kitchen area continually interrupted the presentation, and a fancy trickling water feature in the room — meant to be *soothing* for dinner guests — became many attendees' greatest annoyance for an hour as they strained to hear.

The result? Thirty-two percent conversion. Now, all cards on the table, you obviously have to attribute a portion of the results of any seminar to the presentation itself, but, in this case (and many others I've seen), the deck had been stacked against the presenter from the outset when it could have been working *for* him with the slightest bit of venue vetting.

At a bare minimum, there are nonnegotiable venue components to scout in advance; for a downloadable copy of the

complete Venue Scouting Checklist for your events coordinator to print and use, go to **www.realwinsmaterials.com**.

ACCESSIBILITY & PARKING

- The venue is well-known by prospects throughout the area.
- The venue is easy to get into — even during rush-hour traffic.
- Parking is convenient, and ample handicapped spaces are available for guests.

VENUE & ROOM LAYOUT

- The presentation room can easily be found by guests visiting for the first time.
- Seating for all guests is comfortable without being crowded.
- Guests can easily see and hear the presenter from all vantage points in the room.
- Noise from outside the presentation room is neither audible nor a distraction.
- Management allows for branded signage wherever your firm wishes to place it for ease of guest navigation and maximum PR.

A/V OPTIONS

- The venue does/does not offer any audio/visual equipment (e.g., projection screen, speakers, projector, etc.).
- The venue offers in-ceiling room audio with streaming music selections to meet the tastes of the target audience.

- Volume controls for in-room audio are readily available and at the host's control during the event.
- Dimmable lighting controls are available in the room, allowing minor adjustments to be made as needed without completely lighting or darkening the room.

FOOD QUALITY & SERVICE

- The menu accommodates any special dietary needs guests may have.
- Food has been sampled and deemed satisfactory for guests.
- Ample beverage options are available, and stipulations for which types of drinks will be served (i.e., alcoholic, nonalcoholic, etc.) are agreed upon in advance.
- The venue is adequately staffed with seasoned servers and hosts capable of tending to guests in a professional manner.
- Staff can be flexible (but prompt) in their delivery of salads, entrees and desserts based upon specific conclusion time of the seminar.
- You will be given a dedicated point person for the afternoon or evening of the event for any and all questions and concerns.

CANCELLATION PROVISIONS

- Reasonable provisions are in place for canceling the seminar in the rare event of unforeseeable circumstances such as inclement weather, a completely failed invitation, etc.

(NOTE: Just as crucial as the vetting of a venue itself is the *time* at which you conduct it. Often, an advisor or marketing director is

tempted to swing by a restaurant to do their recon in the middle of the afternoon — i.e., when it's *convenient* for them. Do not succumb to this urge. If you want to see how a restaurant *really* performs under fire, you have to meet them in the trenches.)

Show up at the exact time you plan to host your event and take copious notes. Is the parking lot chaotic? Is the host stand manned with a friendly face? Is a manager readily available? Is the wait staff sufficient, or are they scrambling like mad to cover tables? What is their demeanor with guests? Pop into your prospective presentation room, close your eyes and listen: Is external noise a distraction? Order a meal. On the spot. And start the clock. If they can't produce a single meal in a timely manner with excellence during rush hour, how will they produce 40? The *most* important factor in your visit? Showing up unannounced. Any venue that knows you're going to be bring them repeated revenue of $2,000 to $2,500 per night is going to put their best foot forward.

You want their *real* foot. Do not tip your hand.

DON'T UNDERESTIMATE EASE

We live in a culture of Keurigs, DVR'd sitcoms and streaming music services. We are so pampered, it's ridiculous. From a stoplight using my iPhone, I can place stock trades, lower my garage door and re-order dog food that will arrive on my doorstep in 48 hours. While your prospects may not be Generation Xers like me, they've grown accustomed to similar ease. Therefore, it's imperative that you consider providing them the path of least resistance at every turn possible.

When you consider that your prospective clients are receiving, on average, two to three seminar invitations per month, their choice of which one to attend is often impacted by relatively trivial and impulsive factors.

For instance, given the choice of seminars at two comparable restaurants — one of which is on the outskirts of town but

involves little to no traffic and the other of which sits in the heart of downtown in the thick of disastrous construction — many prospects would clearly opt for the former over the latter, even if the second venue had an edge in ambiance or food quality. The preference for ease continues once your guests arrive, so consider all points of ease as you plan your events:

- Is the venue a nightmare to get to at 6 p.m.?
- Is the turn into the parking lot across three lanes of high-speed traffic?
- Is complimentary valet parking an option? (For an additional $250 to $300, this added touch can make a nice first impression and have guests walking in cheerful rather than in a huff about the quarter mile they had to trek.)
- Are restrooms located near the presentation room, and are pathways through the restaurant easily navigated?
- Is text size on your printed materials and PowerPoint easily readable for guests? (Graphic designers often fall victim to making things aesthetically pleasing without always pausing to consider whether they are *functional*, and a 67-year-old attendee often can't read Times New Roman in 10-point font.)
- Are audio levels sufficient throughout the presentation room, and are *any* other noises competing for the attention of your guests?

While each of these details appears trivial on the surface, they each contribute to the comfort or discomfort of your prospective clients. When it comes to the all-important conversion at the end of the event, uncomfortable prospects do not set appointments.

DON'T MAJOR IN THE MINORS

In an effort to bolster credibility upon entering this industry, many advisors began a near-feverish quest for designations and credentials. From the CLU, ChFC and CFP to the AAMS, CRPS and CRPC, advisors' business cards have nearly become bi-folds just to house the litany of alphabet soup that follows their names. And justifiably so. Many of these designations involve rigorous study, complex examinations and continuing education. If I held every one of those credentials, I would be proud of them, too!

However, here's the rub: When asked to rank a list of factors they deemed important when considering a potential financial advisor, over 98 percent of seminar attendees polled ranked "having a wide range of credentials and designations" *dead last* among their priorities.

The unkind truth is, while many advisors spend years (and tens of thousands of dollars) accruing a slew of qualifications, prospective clients simply don't care. Why don't they care? Because they have *no idea* what any of those things mean in the first place. *(More on this topic and how it impacts your actual presentation on Chapter 12.)*

So, what is the practical application here? Whether on your business cards, seminar invites, brochures, social media, blog posts or website (where potential seminar-goers may Google you before attending), don't clog your marketing with credentials. Instead, focus on what *does* matter to prospects when polled. Fifty-eight percent reported the *most* important trait in an advisor was honesty and integrity followed by 29 percent finding greatest significance in an advisor's ability to protect their money from loss.

Thus, if we want to *connect* with prospective clients, our messaging and marketing real estate should be spent there.

CONSISTENCY IS KING

Continuing on the topic of messaging, let's pause for a moment on the almighty seminar invitation itself. For years, producers, IMOs and mail houses alike have sat at drawing boards, trying to come up with the *exact* language that would pique the interest of their target market, attracting them by the droves to the next event. Millions of dollars have been spent in careful A/B testing of the most miniscule aspects of seminar mailers. "What if we use this call-to-action instead of that?" "What if we try seven bullets rather than five?" "What if, this time, the lead-in was a question instead of a statement?" (Picture scientists in lab coats with beakers and measuring glasses. I'm telling you, the research has been exhaustive.)

Meanwhile, I'm embarrassed to admit how long it took the following thought to occur to me, but sitting in an office one day, I wondered, "Why in the *world* do mail houses and advisors continue testing invites against each other to see what *might* interest prospects? Why don't we just go *ask* some?"

(NOTE: Sometimes the best ideas aren't the most complex.)

Within a week, I had flights booked to go see three advisors' seminars, to survey their attendees as to exactly what in the invitations had caught their attention and drawn them to the event. The results may frustrate you. Greatly.

When staring at the *actual* invitations they'd received just one to two weeks prior, *at least 90 percent* of prospects could not point to a *single* piece of copy — not a headline or a bullet or any cleverly worded hook — that actually caused them to attend.

Instead? Sixty-nine percent of those surveyed indicated they had responded because "it just happened to be the right time and they'd wanted to attend a thing like that for a while." (Remember Goodyear, which had its brand name in front of you 2,700 times between tire-buying cycles. And who do you think of when you need tires? Yep.)

But wait … back to these seminar invites. "What do you mean the copy didn't matter? What about the gloriously crafted headlines and all those perfectly manicured bullets?" Nope. Not a one of them was recalled.

Instead, people said, "You just happened to catch me on the right day when financial matters were on my mind." Now, pause on that thought for a second. If that's the case — if nearly 70 percent of your attendees show up because you just happened to put your invite in front of them while they were considering their financial future — what does that really mean from a marketing perspective? Does it mean you should allocate a quarter of next year's budget to The Psychic Hotline so you can have better odds of guessing when prospects might have interest? No. Instead, it means your *consistency* in marketing is absolutely paramount.

You and I can't predict when Linda is going to be eight months from retiring from Pfizer and wants to discuss income planning. You can't rub some crystal ball and know when the Atkinsons are going to inherit a windfall or the Zhaos' relationship with their Edward Jones rep of 25 years is going to head south. However, you *can* control how consistently you are in front of them with your message.

In markets all around the country, advisors often tell me, "There are just 'down times' in this area that you don't *dare* hold events because people just won't show."

Please hear this: Whether it's July in Jacksonville, August in Augusta or January in Juneau, the reality is, when your competition lays *off* the marketing gas, it may be the perfect time for you to step *on* it because, year-round, prospects are feeling that "it just happened to be the right time." Don't let perceived seasonality issues keep you from reaching those in search of your services.

INVITATION LAYOUT — THE CASUAL INFLUENCER

If *copy* isn't king in an invitation's effectiveness, does *layout* matter? According to your prospects, yes it does. Statistically speaking, the single largest visual attractor to dinner seminars on an invitation is (1) a large, full-color, high-resolution photo of the meal being served and (2) the prominent presence of a well-known restaurant logo. These two elements alone were cited by over 45 percent of survey respondents as factors in their responses. Translation? Believe it or not, we are all relatively base creatures, and if you want to catch the eye of the average prospect, show them a perfectly plated, medium-rare filet mignon.

What other best practices should you adhere to related to layout? Here are eight more worth noting:

1. **Full-Color Head Shots**
   Consumers are naturally more interested in a presenter they can envision, so be sure to include a *current* professional photo, along with your name and title.
2. **Visuals of Any Published Works**
   If you've written a book, don't miss the opportunity to show its cover along with mention of your status as a published author. Remember, many of your competitors have never achieved this feat.
3. **References of Media Presence**
   If you host a radio or TV show or are featured on the local affiliate's "Money Matters" segment, make sure every piece of marketing you push out reflects this media exposure.
4. **No More than Five to Six Bullets**
   Including bullets about everything you could *possibly* cover at your event can be confusing and overwhelming to your audience — even discouraging some from attending. Keep it simple. (NOTE: It is not lost on me that I am giving you

such counsel within a string of eight bullets. Grant a brother some grace.)

5. **Tangible Offer for Attending**
   Whenever possible, include the promotion of an additional value-add, such as a workbook, an informative guide or some other resource for all attendees, simply for showing up at your event.
6. **Reminder of Limited Seating**
   You will often fill events quicker by having a prominent reminder of the fact that a venue is only able to accommodate a given number of guests.
7. **Prominent RSVP Number or Link**
   Never make your reader "burn calories" searching for how to respond to your invitation. Be sure your RSVP number or mechanism is screaming at your audience at first glance.
8. **"Handwritten" Fonts**
   The strategic, limited use of a script-looking fonts — offset in a different color — can help differentiate your mailing and draw readers' eyes to specific areas of information. (NOTE: The fact that copy generally isn't very memorable to the typical attendee doesn't mean you shouldn't at least ensure that copy is timely, relevant and well-proofed. Your invitation text should always come off professional — Goodyear never lets a NASCAR sponsorship read "Goodyar." Just know going in that copy is likely not going to rule the day.)

Alright, so we've got this plane off the runway and pointed in the right direction.

Next up? Ensuring our attendees actually show.

TO-DOS:

- Download the Annual Seminar Planning Guide from **www.realwinsmaterials.com**, and make sure planned seminar dates don't conflict with known holidays or other scheduling obstacles.

- Download the Venue Scouting Checklist from **www.realwinsmaterials.com**, and ensure every aspect of upcoming events at your desired venue(s) has been vetted.

- Review parking, room set-up, printed marketing materials and A/V variables to ensure an easy experience for your guests.

- Plan your next 12 months' seminar calendar — keeping the marketing pump primed year-round.

- Review current seminar invitations to ensure they abide by best practices.