

SEMINAR RESOURCES

Creating a Winning Seminar Process


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Putting together a client seminar can be time consuming and stressful, but using the following process can help ensure that your seminar is well planned and professionally executed.

Two reasons that discourage investment professionals from hosting seminars

1. Poor attendance or *no* attendance
2. Unqualified attendees

Why potentially good seminars fail

- Topics that are not engaging or relevant
- Title of seminar too general (Investment Forum, Workshop, Family Forum, etc.)
- Poor speakers (no passion, not dynamic)
- No clear followup process

Improving the odds for success: Questions you may want to ask yourself

1. Have I chosen a venue that is easy in and easy out? Is parking easily accessible?
2. Location, location, location: Is the venue convenient to those who have been invited?
3. Is the venue room set up well for a seminar? Are you arranging the seating to maximize effect?
Does the staff know how to set up the room properly? (half-moon seating, etc.)
4. Are *you* training the wait staff, e.g., when to come into the room and when not to enter?
5. Are there professionally printed name tags? (Suggestion: Print home town and state on name tag.)
6. Meet and greet: Are you greeting and introducing yourself to attendees as they arrive?
7. Do you walk people to their assigned seating?
8. Do you start on time, or are you one of those people that says, "Well, traffic is heavy so we'll wait for a while longer?"
(Have you noticed that those who are "stuck in traffic" never make it?)
9. Do you have an established finish time, and do you abide by it?
10. If it is a dinner seminar, are the salads and glasses of water already in place when guests arrive?
11. Do you introduce your attendees at the beginning of the dinner?
12. When you begin, do you have a narrative about yourself and your core beliefs as an investment professional?
13. How do you use your vendor or wholesaler (6 to 8 questions)?
14. Have you structured your presentation so that your opening and closing remarks are consistent, bold and brief?
15. Have you set the appropriate expectations?
16. Do you have a close that includes an ask?
17. Do you keep a log of every seminar's successes and failures?
18. Last and most important, have you made yourself the star of the seminar?



For more information or business-building ideas, please call your MFS® sales representative at 1-800-343-2829.

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