

# Client events: Tips for ensuring success

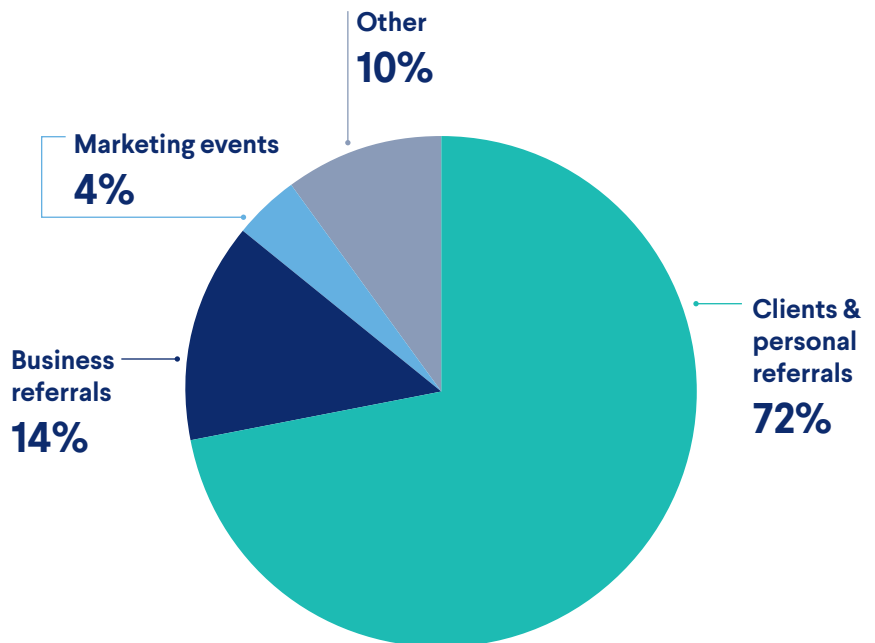
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In the age of information overload, there is nothing better than good old-fashioned face-to-face interaction. Conducting a client seminar is an effective way to get connected to and stay connected with your clients, plus it is a great source of potential new referrals.

A client event presents an opportunity to connect, network, and engage, and it creates a memorable impression about you and your practice. But it could be a hit-and-miss game due to prior engagements, traffic, weather, and so on.

I will share a few helpful tips on how to make a client seminar a success. From the graph below, we can see where the majority of referrals come from. Hosting an event can only boost your chances.



Source: Capital Group, Pathways to Growth: 2022 Advisor Benchmark Study <https://www.capitalgroup.com/advisor/practicelab/articles/successful-prospecting-seminars-for-advisors.html>; 8/9/2024  
 Other includes Direct marketing 3%, Social media 2%, Other 5%

## Eight weeks before the seminar

There is no such thing as starting too soon. I encourage you to start planning a client seminar eight weeks ahead of time. Some initial steps include:

- 1) Topic selection
- 2) Obtaining proper content approvals
- 3) Selecting a venue: location, date, time
- 4) Invitations with all the relevant information, including the RSVP
- 5) Most importantly, the audience: who and why?

Any financial topic, or a topic not necessarily finance-related but that your clients would find of value, could be a reason for a seminar. Social Security, Medicare, college planning, financial exploitation, or cybersecurity safety could be good topics.

Define your target audience. If the event is for existing clients, maybe conduct a year-end wrap-up or a client appreciation event for which you encourage them to bring friends and family. This should take no more than two weeks to prepare. Once that is done, you can start with promoting the seminar and inviting the attendees.

At Delaware Life, we can help with the preparation of the seminar description, and we also can produce personalized invitations with the speakers' pictures and contact information.

## Six weeks

**Email #1:** Send an event invitation with a description and benefits of attending the seminar.

At this point, you'll send out the first email invitation as noted above. You can also promote the event via word of mouth and phone calls. As a leader in your community, you can also promote the event at other social/networking gatherings. Banking professionals and staff could also promote the event at their various branches.

## Four weeks

**Email #2:** Send an event reminder with a description and benefits of attending the seminar.

Now that your event invitation has been sent, you should have a number of RSVPs. Email reminders are a great way to keep everyone informed and elicit additional responses. You can make phone calls as well to remind those who RSVPed what the benefits of attending the seminar are. In addition, if there are those who you do want to attend but have not yet RSVPed, a phone call is a more personal touch to ask for attendance.

## Two weeks to three weeks

**Email #3 with phone call support:** Continue the pre-event email and phone call dripping to ensure you have the desired number of attendees. It is a great way to reach out and thank people for the commitment to attend, and to remind them about the date, time, and place.

A flyer or other physical content related to the event that can be emailed to the attendees is a great way to keep them interested and engaged. For example, for Social Security seminars, I send 13 true/false questions to financial professionals. It is a great way to keep clients curious. Financial professionals can ask their clients to email the answers or bring them to the event and collect them then. I also bring extra copies to the event and always see clients fill them out. In a way, it's a fun game.

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## One week

**Phone call:** The last week is crucial, as you have done all that outreach and must now ensure the attendance is there. Here, I would only use a phone as my tool, as it is more personable. If I don't reach someone, I leave a voicemail. If someone cancels, one week still gives you time to find a replacement.

## Day of the event

**Email #4:** This is the last time to make contact, and here I send an email the morning of the event to remind attendees about the logistics.

## After the event: Feedback and follow-through

After the event, you should conduct a series of follow-through actions. You don't want this to be a one-and-done situation. The most personable way is a "thank you for attending" phone call. It gives you a chance to connect, ask questions, and ask for a one-on-one meeting.

It is also helpful to have a series of marketing content to send via email. This should be done in intervals, stretching over four to six weeks after the event.

**Email #5:** The day after the event, send a thank you note: Thank you for attending our event on <date> at <place>.

**Email #6:** The week after the event, send an email with marketing content, such as a one-page flyer, related to the event: I thought you would benefit from the attached information. Ask for a meeting.

**Email #7:** Two to three weeks after the event, send an email with additional marketing content related to the event. Again, ask for a meeting—what I call being pleasantly persistent.

Taking an intentional and systematic, touchpoint, drip campaign approach will boost your chances of hosting a successful and well-attended client event. This holds true before the event and leaves a memorable impression after the event.

## Best practices: Stories from the road

- We conducted a Social Security client seminar in the Pacific Northwest using this approach. It took place on a Saturday at 10:00 a.m. and was a great success. We had about 40 participants, with a Q&A session at the end, and from the originally scheduled 60 minutes, it ended up going 90 minutes. The audience was a local credit union, and the venue was the credit union's conference room.
- Another success was a seminar with a banking professional in Indiana. We held it at a local library, with 15 participants. What was different and encouraging about this event was that the library promoted the event for us to the library visitors. The library had an announcement and a signup sheet. These were pure prospects and not existing clients. If they didn't become clients immediately after the event, they might a few years down the road or they might provide a referral.
- We have hosted events where only a handful of people showed up, maybe three or five. From my perspective, as long as we are educating and sharing knowledge, and attendees come out of the meeting knowing more than when they walked in, every event is a success.
- Some financial professionals choose to host client information or education seminars monthly. To put on a successful client event does take effort and preparation. The decision on frequency is up to you and your schedule, whether it's monthly or quarterly.

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## About the audience

Choose the audience carefully as not everyone might be interested in a particular topic. Your audience will also vary if your practice has a particular niche: corporate executives, small business owners, entrepreneurs, or professionals. This is why it is important to start planning early and fill the spots with new clients/prospects in case there are declines. For example, it is a common perception, that for Social Security, the audience should be closer in age to start collecting the benefit. In my mind, it is more about education, reaching out to the community, and about community presence. It is more about future income planning. That process should start much earlier. As a financial professional, it is about being a leader in the local community and about forging stronger relationships.

## Topic selection

You may think of year-end planning, investment outlook, or client appreciation, but there are other topics that will enable you to attract a broader audience. For example, some common topics include:

- Cooking showcase class
- Healthy eating
- College planning
- Your favorite barbecue
- Art gallery or music theme
- Charity event like the local food bank
- A seminar on career planning
- A get-together for a major sporting event
- A wine tasting at a favorite wine merchant
- Money and children: allowance vs. chores

## Client events: A good business-building tool

Client events can be fun, yield good results, and help you grow your practice. Whether they are successful depends on proper preparation, the right topic, ease of use with the right digital technology or location, and an appropriate audience. Hosting successful client events can leave a lasting impression on your clients and improve your brand awareness in the local community. A successful event is an art, not a science. As a famous “philosopher” once said: “Do or do not, there is no try.”

For other ideas on hosting client events, please reach out to our sales desk at +1-844-DEL-SALE, opt #1.

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