

# CHECKLIST FOR A SUCCESSFUL EVENT



## For any event:

1. Arrive on time. Your prospects should see that you're prepared and available when they walk through the door.
2. Be well-groomed. Your attire and attention to detail will support the image that you care about your prospects and their needs and that you are an expert in your industry.
3. Establish your credibility. In addition to your attire, your behavior before, during and after your event will show your prospects that you are a consummate professional and deserved to be trusted.
4. Make your prospects comfortable. Your location choice should have ample seating, access for prospects who may be disabled and should be clean and well-maintained.
5. Keep your discussion concise and simple. Don't overload your prospects with information; instead, provide them with key points and use their questions about those points to delve deeper into conversations if need be.
6. Send thank you cards. This is a simple way to show your prospects that you appreciate their time.

## For seminar events:

1. Remember the little things. They matter. Do you have a seating arrangement that will allow late comers to take their seat without making them uncomfortable? Did you plan for breaks in your presentation? Are there meal options for prospects with a variety of dietary needs?
2. Make sure your presentation materials and equipment are in place and working. This speaks to your credibility and your ability to manage.
3. Have staff available to assist you. While some tasks can be delegated, others should not. Getting water or refreshments for prospects is something staff can manage, but welcoming prospects and introducing them to each other before the seminar begins is something you should manage.

4. Ask prospects to evaluate your presentation. Use simple evaluation forms in the packets of information you hand out and leave time at the end of the seminar for prospects to fill them out. You'll need the information they leave to follow up with them.
5. Follow up with each prospect. Contact those who attended and inquire about their short-term and long-term needs. Contact those who did not show and invite them to future events.
6. Negotiate with restaurants. Each invitation will have their logo on it, and that's a lot of free advertising. If they make a good price proposal, you'll hold all of your seminars there. Ask for lunch portions and avoid paying fixed charges and room minimums.

## For one-on-one appointments:

1. Make courtesy reminder calls. Call your prospect one to two days prior to the appointment to remind them of the upcoming date / time / location and confirm directions. These courtesy calls will help you begin to build relationships with your attendees, as well as minimize your attendance drop-off rate.
2. Be personable. Prospects will respond to your charisma and will feel as if they can share with you.
3. Listen. Prospects are more likely to engage with you during a one-on-one appointment, which means you have the opportunity to listen to their needs and build a relationship.
4. Offer something of value. This could be anything from a report on a financial concern the prospect has, a book or newsletter you have written or a gift card.
5. Ask about their primary concerns. Provide practical information on how you can address those concerns.
6. Close on a positive note. Be assertive and confident as you end the appointment while you remind your prospects why your services and products are the best to manage their financial concerns.

