

Client Seminar Success

Top tips for hosting a successful client seminar/webinar

Hosting a memorable event is a great way to educate clients and prospects and create meaningful connections. Whether you are new to conducting seminars or an experienced pro, Prudential has the expertise and capabilities to make it as easy as possible for you. The key to success is having a good plan and starting early, so use our checklist to get started.

8 WEEKS AWAY

- Choose a Seminar Topic**—Select from a [broad range of topics](#) within the Prudential catalog.
- Compliance**—File your presentation and supporting materials with your Broker Dealer's compliance.
- Create Your Guest List**—Your Prudential Wholesaler can help you mine your book to identify the best client and prospect opportunities based on the chosen topic.
- Define Your Goals**—Set targets for: Number of attendees, number of appointments/follow-ups, etc.
- Set Details**—Choose your preferred date, time, venue, and confirm availability with your Prudential Wholesaler. Consider national or regional events that may conflict with your event.

6 WEEKS AWAY

- Finalize Event Details**—Event location, budget, and guest list.
- Gather Event Materials**—Your Prudential sales team can help you secure invitations, the presentation, and any supporting marketing material that may be needed.
- Consider Extras**—Think about any special arrangements needed for the venue such as: audiovisual equipment, menu, room set up, etc. or meeting software such as: Zoom, Webex, On24, etc.

4 WEEKS AWAY

- Send Invitations**—Send evites. If mailing, consider hand-writing the envelopes; this has proven to increase the open rate. Include directions and parking instructions (if applicable).
- Prepare for Seminar**—Review and familiarize yourself with seminar content.

2 WEEKS AWAY

- Confirm Attendees**—Check those who have responded.
- Contact Non-responders**—Follow up with those invitees who have not responded.

1 WEEK AWAY

- ❑ **Reminders to Acceptances**—Make calls/emails/texts to all confirmed attendees of upcoming event. Can also do this the day prior to or the day of the event.
- ❑ **Confirm headcount**—Check in with the event location and ensure equipment is available as needed.
- ❑ **Have a Review Call with your Prudential Wholesaler**—Go over the details of the event: materials, sign-in sheet, name tags, thank you gifts, etc.
- ❑ **Practice**—Review any opening and closing remarks you may have.

DAY OF EVENT

- ❑ **Arrive Early**—Set up well in advance of guests arriving, familiarize yourself with the space, and test the technology.
- ❑ **Meet and Greet**—Greet everyone as they arrive and are signing in.
- ❑ **Last Minute Nuances**—Discuss with the wholesaler any special call-outs that may be pertinent to the audience for the given topic.
- ❑ **Evaluation Form**—Ask attendees to fill out an evaluation form. This can help you improve your seminars over time.
- ❑ **Set Appointments**—Have your appointment book handy so you can set up appointments.

EVENT FOLLOW-UP

- ❑ **Thank You Notes**—Send personal thank you notes to all attendees with an invitation to continue the conversation.
- ❑ **Follow Up Post-Event**—Contact attendees to follow up with any new information and to schedule an appointment.
- ❑ **Follow Up No-Shows**—Contact those who responded but could not attend the seminar to schedule an appointment.

**CONTACT YOUR PRUDENTIAL WHOLESALER OR
THE SALES DESK AT 800-513-0805 TO GET STARTED TODAY.**

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