Seminars provide a cost-effective way to reach a qualified audience with a targeted message. The impact of a seminar lies in its timeliness, its relevance to customer needs, and its call to action.

Steps for an effective seminar
Following these steps will ensure that your seminar successfully builds your business.

1. Define your goal
It’s important to consider your business objective for hosting a seminar – it will keep you focused on your ultimate goal. You can start by asking yourself the following questions:

• What is my company trying to accomplish with this seminar?
• Do I have a strong message and clear value to deliver to my customers?
• Am I prepared to follow up with interested customers and take on new business?
• How will I measure the effectiveness of the time and money invested in creating this seminar?

2. Choose a topic
Once you have identified your business objective, it’s important to pick an appropriate topic. Keep the following in mind:

• Promote your strengths. Make sure you’re presenting a topic aligned with your core competencies as a technology provider.
• Keep your audience in mind. Tailor the topic of the seminar to their business issues and needs.
• Convey your message clearly and well.

3. Develop your content
Clearly, the content of your seminar will be the most critical aspect of hosting an effective event. Understanding what your audience cares about is the most critical component in developing a presentation. Make an effort to determine attendee’s key areas of interest, level of technical expertise, familiarity with the problem you solve, and their knowledge of the market need you are serving. Use this understanding to customize your messages and determine the best way to engage with your audience.
4. Set a timeline

Running a successful seminar takes a good deal of planning, so it pays to start early. The timeline below includes some key milestones you will need to hit if you are going to be fully prepared.

8 to 10 weeks prior to the event
- Finalize topic
- Determine ideal number of attendees
- Secure an appropriate venue – schedule site visits if necessary
- Contact list brokers to obtain appropriate target list
- Design your invitations
- Choose event giveaways

7 weeks
- Continue working on content
- Complete the design/production of your invitations

6 weeks
- Create event collateral (company brochures, product overviews, etc.)
- Mail your invitations
- Arrange food and beverages as appropriate
- Arrange for audiovisual requirements such as microphones, projectors, screens and podiums as needed

4 weeks
- Analyze registration data and invite more attendees if appropriate
- Create event evaluation form (see example)

2 weeks
- Send e-mail reminders
- Secure a registration table for check-in and collateral
- Check your event giveaways will be delivered on time

1 week
- Rehearse your presentation 7 to 8 times
- Create nametags
- Consolidate all your collateral
- Ship any items that will be needed at event such as collateral, branded signage, tablecloths, etc.
- Make a list of contacts that include phone numbers for catering, audiovisual, shipping, event venue manager

Day of event
- Arrive early
- Check all equipment at least one hour prior to event
- Welcome all your guests as they enter the seminar room
5. Selecting a venue
Select a location that is both professional and comfortable. Your own company training room or large conference room might be the best choice because the customer will have a chance to see where you make solutions happen. Other good options are local hotels and conference centers.

Depending on the time of day, you may want to provide food and beverages for your guests. This is a service typically offered by the venue management.

6. Set up registration
An effective registration process does two things. It captures information about attendees – your current and future customers – and it provides another opportunity for you to communicate with your customers.

Your registration process should capture all the information you’ll need for an informed follow-up:

- Name
- Title
- Company name
- Complete address
- Company phone number
- Email address
- Business size
- Vertical industry

You should also give your customers several ways to respond:

- Phone
- Web
- Mail
- Email

The process should be informative and easy for your customers to use:

- Have a tracking system so you can check registration on a daily basis
- Have an end date
- Provide a contact phone number or email address if they have questions

7. Identify your contact strategy
Generally, this means determining your mailing list quantities and sources. Work backwards from your target number of attendees; calculate how many invitations you’ll need to send to reach that goal. Remember to allow for some ‘drop-off’. Approximately 25% of the people who register for your seminar won’t actually attend.

The next step is to find the lists. If you choose to mail invitations to people on ‘outside’ lists (individuals not on your current customer database), a list broker can help you obtain the best lists for your mailing. Many advertising agencies will act as liaison to your list broker as well as mail houses.

If you are working with a list broker, these questions will help you determine if the broker is providing quality lists:

- How often is the list cleaned? Cleaned lists have been checked for people who have moved, changed titles, etc.
- Are names and titles available for your target audience? For instance, can you select ‘IT Managers’ from the list?
8. Create invitations
Your seminar invitation creates the first impression a customer will have of your company. Invitations should be:

- Professional
- Compelling – introduce a business need that will be met by attending this event
- Informative – the event name, date, location and registration information should be very clearly placed on an invitation

Things to consider:
- Media for invitation (direct mail/print ad/email/telemarketing)
- Anticipated number of invitations
- Speaker bio included in the invitation (if applicable)
- Special offer for attending event
- Call to action on invitation, including:
  - Call (your phone number here) to sign up
  - Sign up on our website at (your URL here)
- Follow up on invitations (direct mail/email/telemarketing)
- Confirmation to registrants (mail/email/phone)
- Include full event information such as date, time, location and a map.

9. Solicit evaluations
Seminar evaluations are essential at any event you host. Evaluations allow you to:

- Check attendance numbers against registration
- Measure the effectiveness of your seminar
- Measure the effectiveness of a particular speaker
- Measure a customer’s likeliness to do business with you, and the reasons why or why not
- Allow for future follow-up with each attendee
- Communicate to your customers that you are interested in their experience at the event

10. Plan your lead management strategy
Determine how you will segment your leads after the event.

Build the segmentation questions into your registration and survey mechanisms
- Ask qualifying questions to determine the audience profile – don’t assume it from your list definitions
- Ask about product/service interests that may not be part of the current offering to plan for relevant future topics. You’ll already have some target invitees for future events
- Include features in your online registration process to drive referrals – for example, “invite a colleague.”
- Distribute a list of sales actions to your sales leads ahead of the event and assign goals. Follow up prior to the event with a reminder call
11. After the event, execute your follow-up plan

- Create an online survey that will support your lead routing plan and event metrics
  - Ask lead qualifying questions up front. People tend to answer objective questions first (i.e. budget, purchasing timeframe); if they run out of time, you have the data you need
  - Ask logistical questions next. These are more subjective, such as the likelihood of attending a similar event in the future, the value of speakers, or topics of interest
  - Use multiple choice or a comment box; limit open ended questions for simplicity
- If you use a paper survey:
  - Use standard-sized white or light paper.
  - Provide pens with your logo
  - Include a “contact me now” box that is easy for you to see when sorting paper leads
- Save your lead source data to make the case for similar events in the future, particularly for tradeshows
- Contact your hot/warm lead plan within 3 to 5 business days
- If your post-event follow-up plan includes email, make sure the attendee “opted in” to receive email
- Do not distribute leads to your marketing partners unless the registrant has given explicit permission to be contacted by third parties. Clarify your marketing partners
- Execute a post-event survey 3 to 6 months after the event to measure sales, impressions, and behaviour shifts

12. Follow up

The list of customers who attend your event is extremely valuable. After your seminar, each attendee should:

- Receive a thank you note reminding them of your offerings and contact information
- Be placed in your Customer Relationship Management database

Event Checklist

- Date/time of event
- Venue for event with map
- Agenda
- Registration capabilities (web, phone, mail)
- High-impact speaker
- Presentation materials
- PowerPoint, video, workbook, CD-ROM
- Event invitations in email and flyer formats
- A/V for the event
- Refreshments and/or food
- At a minimum, supply water and hard candy
- Name tags for the event
- Pens, pencils, paper at the event
- Giveaways for the event
- Post-event evaluation forms
- Special “closing” offer for attending the event/call to action:
  - Free 1 hour consultation
  - % discount if ordered within 30 days
  - A sales team that’s ready for leads!
- Additional items you may want to bring:
  - Company brochures/hand-outs
  - Banners and signage
  - Customer references
  - Success stories
  - Business cards
Planning for a successful customer event

TIPS

**Schedule the speaker most likely to draw an audience**
Locate the most reputable speaker on a given topic. Name recognition and notable accomplishments can go a long way. Even if that speaker presents only a portion of the session, they may be able to attract people to your event. Highlight their bio in your invitations. Consider inviting a satisfied customer to do a “cameo” appearance at your event where they can share how your solution positively impacted their business.

**Develop a theme (and/or series)**
A theme can make your event more memorable and interesting. It can also make it easier to lead into a follow-up discussion or event series. A theme can bring the entire event together through giveaways or other materials.

**Suggested flow for your presentation:**
1. Describe the situation/problem/pain: To bring the problem to life, use graphs of industry trends/forecasts, brief quotes from recognized news media, and/or quotes from customers and industry analysts.
2. Introduce key information, including other reference sources, which will assist your guests in solving the problems they may be encountering. Offer information on how to diagnose a problem and assist with defining a solution. Offer a variety of alternatives to alleviate the problem.
3. Showcase the technology you are presenting (if applicable). Demonstrations are the most powerful way to present your product.
4. Gently introduce your company or product in terms of practical results.
5. Outline the key benefits your company or product delivers: think in relevant business terms. Examples that may resonate with your audience include increased productivity and reduced operating costs. Offer your company’s unique points of differentiation.
6. Support your claims with case studies, customer quotes and ROI data.

**Marketing Timing**
Usually, professionals market their seminars much too early. Announcements for 2 hour seminar are best done about three or four weeks in advance. Rule of thumb: the shorter the seminar the shorter the event announcement lead time.

**List Targeting**
In direct mail the three greatest indicators of success are lists, lists, and lists. Before you send out one piece of mail, make sure you have a reasonable expectation that the people on the list will be interested in your topic. A great seminar title, mailing package, and value proposition will generate zero attendance if you mail it to a list that is not.

**Seminar Marketing Response Expectations**
Some highly successful events marketed by professionals don’t even get a 1 per thousand response. Mailings for mini-seminars tend to do better than this, but not always by much.

If you have your direct marketing response expectations set too high, you are in for both disappointment and low attendance. So make sure you have enough good names to mail to, and mail enough pieces to actually fill your room.

**Marketing Piece**
Sometimes a postcard is perfectly fine for generating attendance for your seminars. Other times email is all you need. It might be that invitations will work better for your event. Sometimes you need an invitation, a letter, a business return envelope, a white paper, and convenient registration on your website.
This could be (and is) the subject of whole books. Just be aware that you should research what kind of marketing piece might work in your situation, for your audience, and test different pieces on different events. Think about your audience, what their day looks like, and then send them the piece that will get through the noise and clutter.

**Registration Fee**

Many professionals assume their ‘marketing seminars’ should be free. Here are a few reasons to consider charging a registration fee:

a) Paid events will often generate more actual attendance than free events.

b) Paid events tend to have significantly fewer no-shows than free events.

c) The attendees you generate are usually more interested in the event than those attending a ‘free’ breakfast, lunch, or ‘networking’ event.

d) People come expecting value instead of a sales pitch. If you then deliver value, you’ll establish the expectation and knowledge that time with you is worth the money.

Also note that, depending on your service, free seminars can work as well as paid ones, especially for business-to-consumer professional services. Our final advice on the subject: know your audience, make good business assumptions, and test both paid and free.

**Seminar Title**

Your seminar title needs to clearly state what value you will deliver at the event. You will also want it to be as short as possible (but as long as needed), and appealing to the reader. Using the words “How To” in a seminar title has proven time and time again to increase attendance. The title “Learn about new investment opportunities” (a real title we recently saw), would be much more effective if it were called, “How you can take advantage of new investment opportunities.”

A very simple approach for seminar titling: Make a list of a dozen or so different ways you could title the event. Ask for feedback from colleagues, clients, and potential clients. If you run the event multiple times, test different titles and see if one title generates more attendance than the other.

**Seminar Marketing Partners**

Marketing partners are an often overlooked source for boosting seminar attendance. You can, for example, partner with two other firms and pool your resources and mailing lists to increase response and then deliver together. Besides having extra names to market to, your event will have a multi-faceted presenter list which can often increase attendance in and of itself.

You can also co-market the event with a trade association, get the event notice listed in your partner’s enewsletters, work with a college or university to sponsor the event, or any number of other partner strategies. For example, a network security service firm we know partnered with the FBI to run their seminar on the new security issues facing firms. The event pulled better than anything they had ever done before.

In most cases, the ultimate goal of an event is not simply the number of attendees you can get to your seminar, but rather, the number of ongoing qualified prospects, referrals and clients that you can generate. Therefore, it is crucial that you take steps to measure the success of your seminar. Put together a short questionnaire (10 questions maximum) that will help you understand whether you met the needs of those who attended. Offer attendees the opportunity to send you additional comments or suggestions.