

How to Double Your Seminar Appointments

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Do you use seminars to get new prospects? Are you booking less than 85% of attendees into appointments? If so, then please read on.

If you're like most advisors, you are lucky to get 20% to 25% of household units at seminars willing to book an appointment. But here's the real problem. By the time you follow up three to five days later, the attendee has lost all interest. Worse yet, they often can't remember even attending the seminar.



It is difficult to get anyone to come to a seminar, even with a free dinner. The problem is that 25% are totally unqualified, 50% only came to get the free meal, leaving you 25% who have a real interest in solving a financial problem. Worse yet, attendees will forget 70% of what they hear one day after the seminar, 90% after three days and lose any emotional motivation to keep an appointment they might have booked at the meeting.

If you offer dinner, you will pay \$683 per booked appointment. If you hold a seminar at a library, even without supplying dinner, the cost will be near \$200 including the venue and marketing expense. Even if you do a client event and are smart enough to incentivize them to bring guests, the cost per appointment could be \$300-\$400.

Here's how to maximize the attendee response and gain appointments from any seminar.

The five-step evaluation

There are three ways most advisors use to book seminar appointments:

1. Call attendees a few days after the seminar.

Often an advisor will ask for business cards or pass around an appointment sign-up sheet. A staff member might follow up with the attendees a few days later. This has about a 25% appointment-closing rate and a lower rate of keeping the appointment.

2. Pre-sign up attendees before the seminar.

Some enterprising advisors will pre-book an appointment and put the confirmation in the attendee handout packet. This obviously will book appointments, but irritate those who never intended to meet or show up in the first place.

3. Walk around the room and sign people up as they are eating.

While embarrassing to your staff person and distracting to the attendees, the response often is "I don't have my schedule yet, I will call you later." If you press them, they will simply cancel later.

The best way to book appointments is to create a need and let them self-evaluate why they should book an appointment with you. Every current and pre-retiree has five concerns:

1. Worries about running out of money during retirement;
2. Fear of volatility;
3. Nervousness about Inflation;
4. A belief taxes will lower their standard of living; and
5. A desire to build a family legacy and/or protect themselves against catastrophic illness cost.

Since these are seniors' greatest concerns, why not get attendee to self-rate their needs using a format such as the one

below?

Running out of money during retirement	(No concern) 1-2-3-4-5 (Very Concerned)
Volatility	(No concern) 1-2-3-4-5 (Very Concerned)
Inflation	(No concern) 1-2-3-4-5 (Very Concerned)
Taxes	(No concern) 1-2-3-4-5 (Very Concerned)
Legacy and/or catastrophic illness cost	(No concern) 1-2-3-4-5 (Very Concerned)

Here's how it works

Ask the attendees to fill out the contact information at the top of the evaluation sheet. Next ask the group to rate on a scale of 1-5 how concerned they are about each area. For example, "Running out of money is one of the scariest things during retirement. In fact 83% of you will run out of money during retirement and be dependent on Social Security; perhaps even become dependent on your children. Please raise your hands if this is a concern for you? On a 1 to 5 scale, 1 being no concern and 5 being very concerned, what number best represents how you feel about running out of money?"

Do this for each of the five questions. Get the group to physically raise their hands during each question. Participation drives engagement. When your attendees become engaged, they book more appointments.

After the last question about family legacy, ask the group again to raise their hands if they scored any question three or higher. For those who raise their hands, ask them to mark the box requesting an appointment with you. At the bottom of the sheet are possible times and days you can meet with attendees. Ask the group to mark 1 for their first choice and 2 for their second choice of appointments.

Many of my coaching clients ask how to get these evaluation sheets back from attendees. Offer to raffle off a free dinner for two or anything else you think might be valuable to get the sheets returned. One my clients even gave away a free iPad thinking that these sheets were like gold (which they are).

There are many benefits to booking appointments this way. First, 85% of the household units will book appointments since they self-rated their concerns and booked appointments based on their own ratings. Second, as you call to confirm the appointments, you can ask about their concerns using the rating sheet as a guide. Any score of 3 or higher is a concern they will want to solve.

So now you know how to book appointments with 85% of attendees. You learned how to keep appointments from canceling, and even how to use the evaluation sheet to engage the client on the first appointment. If you want more information, or even examples of current evaluation sheets my own clients use, please call 714-368-3650. I will spend a few minutes on the phone to help double your seminar appointments and your business.

Dr. Kerry Johnson is an international speaker, best-selling author and coach. He has written nine books including, Mastering the Game, Peak Performance: How to increase your business by 80% in 8 weeks and his newest book, New Mindset, New Results.