

Successful Seminar Marketing 101: Tips for Getting Started

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I am a big proponent of seminar marketing. That's because I have regularly used seminars to successfully build and grow my practice over the past 30 years.

Benefits of Doing Seminars

Before we get into how to start up the seminar marketing process, it's important for you to understand the benefits of doing seminars. Some people believe that seminars are about educating people on estate planning or building your image and firm name in the community. While these may certainly be benefits that come from seminar marketing, there are far more important reasons why seminar marketing is one of the best ways to grow an estate planning practice. Some of the main benefits of doing seminars include:

- Weeding out "time wasters" (who aren't serious about engaging you) before scheduling (and wasting) a one-on-one meeting.
- Better utilization of your time, by going over the same content at one time before several prospective clients, instead of holding initial 1-2 hour individual meetings for each prospect.
- Being able to build the value in support of your fees before people even come in
- Establishing a degree of trust and rapport with prospective clients before holding individual meetings, helping you engage more clients at the end of your initial meetings.
- Making it much easier for clients and referral sources to refer prospective clients to you, by simply inviting them to



attend or come along with them to a seminar.

- Helping prepare prospective clients for your estate planning process in advance, so your meetings and process run more efficiently.
- Motivating prospects (who may even know before the seminar that they need to take care of their estate plan) to finally do something!

"But, how do I get started?"

Although many attorneys see the wisdom of doing seminars, this is the big question that often comes up is. There are a number of common, legitimate initial concerns. You may lack speaking experience and be nervous about presenting before an audience. You may lack the materials necessary to give a successful seminar, including the marketing materials, PowerPoint slides and scripts, handouts, response form, appointment-booking tools, etc. There may seem to be too many details to setting up and conducting a seminar or you may not have enough staff to handle them. Finally, seminars may appear to be too expensive and a big monetary risk if you don't pull it off.

Here's the good news. There *are* some simple and easy so-

lutions to each of these perceived problems.

Lack of Speaking Experience

If I were to sit in on your new client meetings, I would bet that after a few, I would notice an internal “script” that you subconsciously use. Effectively, you are already presenting a one-on-one seminar! All you need to do is stand up and use virtually your same script in front of a group of people. It’s an easier transition than you may think. As I will discuss further below, you can start out with very small seminar groups of less than ten already “friendly” people – – even just four or five – – until you gain a little more confidence. Practice your seminar in front of a mirror, perhaps video record yourself giving a mock presentation and even request a few trusted colleagues to attend a test-run and provide you some critique. Also, you can present your initial seminars primarily or exclusively for your own clients, where if you fall down, you don’t really get hurt. In the end, practice makes perfect and the more seminars that you start to give, the more comfortable and natural it will become to you.

Lack of Seminar Materials

You could take your meeting script and make it into a PowerPoint slide presentation. PowerPoint is not that difficult to use and is recommended for giving seminars, not only so that your audience has another visual aid to keep them involved and help them remember what is covered at the seminar, but also as a way to help you recall the material you wish to cover (it’s your “teleprompter”). In addition to a slide presentation, it is helpful to provide attendees an outline to take notes and to take home with them so that they have materials to reference. Further, one of the most important pieces of seminar materials that many people forget is to provide attendees a response form. This response form helps you gather their information and also gives you an opportunity to follow up with them after the seminar, particularly for those that may not immediately book an appointment for whatever reason at the conclusion of the seminar.

Instead of creating your own materials, it may be a lot quicker, easier and more fool-proof to utilize existing materials that have been time-tested and proven to work. There are numerous reasonably-priced seminar packages that include the marketing piece, slides and scripts, handouts, response form and appointment-booking tools available through [The Ultimate Estate Planner, Inc.](#) and through other reputable sources as well. Why re-invent the wheel?

Too Many Details, Not Enough Staff

You may not even be aware of all of the details that go into preparing for and presenting a successful seminar, so even if you have sufficient staff to assist you, you wouldn’t be able to train them properly. Fortunately, the number of details and amount

of staff involved can be minimized by starting out small with your seminars, as will be discussed below. You can start with just one or two staff members involved – – to setup the seminar, greet your seminar attendees, and, most importantly, help with the appointment-booking process at the end. If you or your staff need guidance on the details of putting on successful seminars, a great tool we have available is our [“A-Z Guide to Seminar Marketing for Estate Planners”](#). This is a turnkey seminar marketing manual based on the one we created for internal use by my firm. It is chock-full of checklists, forms and procedures that will make sure the essential details are handled properly.

Seminars Are Too Expensive

Seminars are only expensive if they cost more than they generate in revenue. To minimize this risk, you can start small.

Okay, now I’m going to discuss what I mean by “starting small”, so you can build your momentum to the point where larger, public seminars are a low-risk, high-reward endeavor.

Step One: In-House Seminars for Clients. In [our previous article](#), we talked about bringing in clients periodically to review their plans and how that can add significant revenue to your practice. Even if you have a small conference room available to you, that seats at least six people, you should utilize this venue for seminars. By keeping it in your office (where you feel comfortable and have “home-field advantage”) and only bringing in existing clients (who already have established trust and rapport with you and will be very forgiving if you do mess up), you gain valuable experience. After you do the first few seminars only for clients, you can then encourage clients to bring their trustees, their beneficiaries, friends and business associates and anyone else who may benefit from the information presented. Let me tell you – – when a prospect comes with an existing client, that’s almost a “slam dunk close” no matter how elementary your speaking skills may be!

You can structure the seminar as a review of key changes in the law and estate planning techniques that may have occurred over the past few years and new services you offer. There is no (or little) additional cost for the conference room and you only need a laptop (which you may already have), an LCD projector (which you can purchase at a reasonable price these days), and an open wall or screen. Your handouts can be kept low-cost too. You don’t need to have fancy brochure materials for this audience, so simply providing an outline for taking

notes that is printed and stapled, along with a one-page response form should be sufficient and help keep expenses down. The marketing can be simple and inexpensive too, consisting of letters or flyers. If you gather your clients' e-mail addresses, you can send them an e-mail invitation or incorporate your seminar schedule into a periodic e-mail newsletter. You also can simply fill up a room of five to ten people through phone calls made by your staff. Clients who are called for a periodic checkup meeting, but are hesitant to immediately book a meeting on the phone, can be invited to come to the seminar first. You can also invite some of your professional referral sources (or professionals whom you would like to become referral sources) such as CPAs, financial advisors, business and divorce attorneys, life insurance agents, etc. (I will explain why in just a bit.)

Step Two: Seminars to Groups, Clubs & Organizations. Most of your clients are involved in some fraternal organization (Kiwanis, Elks, Moose, Rotary, etc.), church organization, or club at their place of employment (Management Club, Investment Club, Retirement Club, etc.). You know the expression, "Birds of a feather flock together", right? Your existing clients -- who fit the right demographic and personality that you seek in new clients -- are the perfect ones to ask, "Are you a member of any group, club or organization?" Ask for the name and contact information of the person in charge of that group, club or organization (or the one in charge of bringing in speakers for meetings), along with permission to use the client's name in seeking out speaking opportunities. You or your staff may have to do some follow-up calls to get through to the right person and finalize the scheduling of a speaking opportunity, but once you get into one of these groups, clubs or organizations, it's like "shooting fish in a barrel"! Your existing client that helped get you the speaking engagement can stand up before the group before you speak and give a great testimonial and the audience will be sold before you even open your mouth. (We have a great training package on how to market and present group, club and organization seminars, including tips on how to super-leverage your results, such as through the use of a thank you letter.)

Step Three: Seminars to Clients of Other Professionals. I previously suggested that, once you become confident in your presentation skills, you invite potential referral sources to your in-house client seminar. Here's why. They can get a feel for not only your presentation skills and content, but the kind of client that you have, who invariably they will like to see you refer to them. Better yet, when they see your clients' positive reaction to your seminar (and assuming they have the types of clients you want), they will feel much more comfortable and enthusiastic about your speaking before their clients (particularly when you explain that their clients will be urged to bring friends with them, who then become new clients of that referring professional!). By

having the referring professional arrange a seminar for his or her clients and introduce you as his or her preferred expert in estate planning, you won't have the pressure of convincing people to do business with you with your presentation -- again, it will be like "shooting fish in a barrel"!

Step Four: Build a "Reservoir" for Future Public Seminars. Public seminars, no doubt, have the highest risk and potential reward. Once you've taken the three steps above, you will have gained the momentum and confidence to present before larger groups of "cold" leads. In addition -- and this is a very important tip -- while you're successfully building your seminar marketing using the above techniques, you should be setting aside a portion of your new revenue to bankroll the costs of your future public seminars, which may include expenses for direct mail, hotel room, catered refreshments, as well as higher-quality, printed handouts.

You Can Do This!

In conclusion, what I will say here is that if you follow this seminar path carefully, you will become very successful at creating new business and giving your firm and future financial security (when you sell or put your business on "auto-pilot" and cut back or retire). The reason I can say this with such certainty is that this is exactly the way I built my own practice (and have helped other attorneys successfully duplicate). Your other option is to hope that the phone rings with new business and continue to waste hours and hours in one-on-one meetings hoping that prospective clients will engage you. Your new clients are out there, it's merely a matter of what you're willing to do in order to go find and bring them in -- and, if you don't, someone else will!

ABOUT THE AUTHOR

Attorney Philip J. Kavesh is the principal of one of the largest estate planning firms in California -- Kavesh, Minor and Otis -- now in its 32nd year of business. He is also the President of The Ultimate Estate Planner, Inc., which provides a variety of training, marketing and practice-building products and services for estate planning professionals. If you would like more information or have a question for him, he can be reached at phil@ultimateestateplanner.com or by phone at 1-866-754-6477.

