

Seminar Planning Guide

Hosting a seminar is a great way to get in front of prospects and clients with relevant topics. Seminars remind your audience of your value, they're interactive and engaging and they pave the way for stronger relationships and introductions. This guide outlines the steps to host a successful seminar in 12 weeks. Go ahead, start planning.

Date/Time	
Location	
Topic	
Audience	

12 weeks out

Task	Notes	Responsible
Identify roles/ responsibilities and schedule your guest speaker	Presenter: Guest speaker: Host: Organizer:	<input type="checkbox"/> Complete
Create/source the presentation		<input type="checkbox"/> Complete
Create/source resources		<input type="checkbox"/> Complete
Plan your commitment factor		<input type="checkbox"/> Complete
Establish your budget		<input type="checkbox"/> Complete
Book the venue		<input type="checkbox"/> Complete
Create a guest list		<input type="checkbox"/> Complete



Helpful tips

- Include both prospects and clients on the guest list
- Consider community business leaders for guest speakers
- Determine seating needs, venue location and capacity
- If applicable, request co-op funding from mutual fund company partners (SLGI only)

Event outline

Introduction: A story or compelling fact to hook the audience's attention.		
Key messages: What three things should your audience learn from this presentation?		
1.	2.	3.
Conclusion/call-to-action: What should your audience do after this presentation?		

8 weeks out

Task	Notes	Responsible
Go over event details with your guest speaker		<input type="checkbox"/> Complete
Create your invitations and key messaging		<input type="checkbox"/> Complete
Send your invitations with registration link		<input type="checkbox"/> Complete
Promote your event		<input type="checkbox"/> Complete
Organize door prizes/giveaways		<input type="checkbox"/> Complete

Audience messaging for communications

Prospects and public	Clients	COIs
<ul style="list-style-type: none"> • Focus on the educational value • Connect with your target market's concerns 	<ul style="list-style-type: none"> • Personalize the email to the client segment • Include a referral request 	<ul style="list-style-type: none"> • Ask your COI to share the invitation • Include the benefit to the COI
<ul style="list-style-type: none"> • "Too many people miss the opportunity to..." • "Do you struggle with..." • "Have you ever wondered how..." • "Given the time of year, you might be thinking about..." 	<ul style="list-style-type: none"> • "As your kids return to school you may be thinking about..." • "It's time to start business planning for the new year..." • "Please invite your colleagues or family members who could benefit from this session." 	<ul style="list-style-type: none"> • "I'd like to extend the invitation to your clients." • "I think this complements your offering because..."

Invitation communication plan

Audience	Channels and key message	Invitation date	Reminder date #1	Reminder date #2
Prospects				
Clients				
COIs				



Helpful tips

- Include a description of exclusive content and attendees' commitment factor
- Informing guests there's a limited number of seats may drive registration
- Keep audience number to a manageable size

4 weeks out

Task	Notes	Responsible
Send your reminder emails		<input type="checkbox"/> Complete
Plan your dry-runs and practice speaking		<input type="checkbox"/> Complete
Meet your guest speaker to go over event details		<input type="checkbox"/> Complete
Continue your promotion		<input type="checkbox"/> Complete
Organize any signage or marketing material		<input type="checkbox"/> Complete
Contact venue to review room set-up		<input type="checkbox"/> Complete
Organize food and beverage (wait for RSVP attendance)		<input type="checkbox"/> Complete
Create your feedback survey		<input type="checkbox"/> Complete
Draft follow up emails to be sent after the event		<input type="checkbox"/> Complete
Begin planning your next seminar topic and event		<input type="checkbox"/> Complete

Follow up emails

Audience	Key message
Attendees	
No shows	

1 week out

Task	Notes	Responsible
Send a reminder email that includes: <ul style="list-style-type: none">• Calendar invite• Parking• Directions		<input type="checkbox"/> Complete
Reconfirm food, A/V, seating, etc.		<input type="checkbox"/> Complete
Ensure your team understands their responsibilities		<input type="checkbox"/> Complete
Practice presentation		<input type="checkbox"/> Complete
Create registration sheet		<input type="checkbox"/> Complete
Obtain clicker and HDMI cable if needed		<input type="checkbox"/> Complete

Presentation day

Task	Notes	Responsible
Arrive early to check: <ul style="list-style-type: none">• Microphone• Technology• Tables/seating		<input type="checkbox"/> Complete
Confirm agenda with your team, event staff and any helpers		<input type="checkbox"/> Complete
Set up signage and registration table		<input type="checkbox"/> Complete
Distribute business cards, notebooks, pens, resources, gifts, etc.		<input type="checkbox"/> Complete

Key communications

- Ask attendees to sign in at your registration table
- Introduce or have someone introduce you and any guest speaker
- Allow ample time for participation and asking questions
- Communicate your value proposition and how you can help attendees
- Clearly state how guests can contact you following the event (phone, email, website)
- Discuss the next seminar topic, date and key benefits
- Ask attendees to fill out feedback form



Helpful tips

- Don't serve food or drinks during the presentation to avoid disruption
- Create opportunities for introductions and networking with your guests
- Greet clients and guests as they walk in and fill seats near the front first

Post presentation

Task	Notes	Responsible
Review attendees versus no shows		<input type="checkbox"/> Complete
Log any feedback and prospects who attended		<input type="checkbox"/> Complete
Send follow up communications within 48 hours		<input type="checkbox"/> Complete
Post any insights or photos from event on social media		<input type="checkbox"/> Complete
Track results and any appointments		<input type="checkbox"/> Complete

That's it!

Congratulations on your seminar. Keep your team updated on what went well, what didn't and what to improve or expect for next time. Remember, the more consistent, memorable and repeatable a service is, the more delighted clients and prospects will be.

We help. You grow.

