

# How to Create A SUCCESSFUL WEBINAR OR TELESEMINAR

## Step-by-Step Action Plan to:

- Share Your Expertise
- Build Your List
- Increase Your ROI

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next **10**Clients.com

# Dear Fellow Advisor

## WELCOME!

Financial Planning is an information-based business. As advisors, we have to educate people not only about the intricacies of personal finance, but sometimes talk through just the basics of why it is beneficial to work with a planner and how the process works. One of the best ways to leverage your time and educate your potential clients is to hold a webinar or a teleseminar. This virtual channel is an inexpensive, easy to set-up, short-lead time way to position yourself as an expert to your ideal target audience.

Through promotion of the event you have the opportunity to build your list with prospects who respond with interest to the content you present. Once you have the content created you have the ability to leverage that material and transform it into a freemium such as an e-book, an audio file for download, or video training (to name a few)!

While creating, promoting and holding a webinar or teleseminar may seem overwhelming at first, once you read this guide you will see that there is a very systematic way to approach the process. Follow the steps I have outlined for you and you'll be able to flow through the process knowing exactly what to do next.

Go out, have fun, use what you learn and create what you want!

Sincerely,

A handwritten signature in blue ink that reads "Kistin". The signature is written in a cursive, flowing style.

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# Step 1

## DEFINE YOUR OBJECTIVES AND YOUR OFFER

### OBJECTIVES

**Every marketing effort you undertake begins with setting objectives.**

Keep in mind that you actually will have two different objectives as you put together the seminar.

- The objective of *promoting* the seminar is to build your list with leads in your ideal target audience.
- The objective of the *actual seminar* is to drive the listener to a revenue generating action. This is your OFFER.

### OFFER

What is the next action you want someone to take as a result of participating in your seminar? Once you determine the next step for your audience, you can then build your seminar to drive the offer.

### Example Offers

- Sign-up for an upcoming workshop
- Come in the office for a complimentary consultation
- Schedule a 30-minute free advice phone call
- Enroll in a 3-week teleseminar series

## Step 2 CREATE YOUR....

### **MARKETING COPY POINTS**

To start promoting your event, you will need your marketing copy points. There are only three essential points you need to decide in advance: Title, Hook, and Event Details. This is the **ONLY INFORMATION YOU HAVE TO HAVE FIGURED OUT TO START PROMOTING THE EVENT!**

#### **1. TITLE**

Draft a catchy title that lures YOUR ideal client (not the whole world). This is how you screen for the promotion to build the list that matters to you. When you are clear upfront, you attract the right kind of prospects to your list, those who are more likely to be responsive to your efforts.

##### **Examples:**

- Sixty & Single — 6 Must Do Steps to Prepare for your Retirement
- Your New Life: Learn how to avoid the 3 biggest mistakes divorcees make with money
- This Wasn't the Plan: How to clean up your financial mess when you want to retire in 5 years.

#### **2. HOOK**

The hook is the three to four teaching points that you present and solve during the seminar. You will want to have a list that includes your structure e.g. "# ways to do xyz". Base the hook on what you know about the needs of your audience. Include both their pain points and their aspirations. Be sure to bring the points down to a practical level so the reader can understand tangibly what they will learn. If you include a lofty aspiration ("Reach your goals"), make sure you also balance out your hook with a more grounded "5 Ways to Save \$500."

##### **Examples:**

###### **In this webinar, you will learn:**

- How to maximize your social security income (especially if you're divorced)
- Ways to keep your spirits up when the market turns down
- The 6 steps you do not want to overlook when you are funding your own retirement

Be sure, also, to toss in something 'Special!'

## Step 2 CREATE YOUR....

### **In this information-packed webinar you'll discover:**

- The fastest way to save \$1,000 per month
- The 3 expenses that surprise and overwhelm parents (not what you think!)
- How you can spend money without feeling guilty
- The #1 financial priority for all new parents

Plus, as a special bonus, attendees will learn Kristin's *Seven Secrets to Saving When You Have a Baby*. You will not want to miss these essential tips!

### **3. EVENT DETAILS**

#### **Mode, Date(s), Time(s), Length**

Start with deciding whether you are hosting a teleseminar or a webinar. Look at the calendar and pick a date, set a start time, and choose the length. This step is deceiving as you can easily get mired in the details as you weigh the pros and cons of each particular day of the week and time. Again, here is a spot where you should "just pick a date" and get it on the calendar so you have a target set.

## Step 3

# PROMOTE YOUR EVENT

Enticing people to come to your virtual event is the biggest challenge and opportunity you have. The more people you can entice to attend the event LIVE, the higher your results. Yes, you will probably send out the recording; however, your highest conversion will come from the people who you lead directly from the call into the next action.

Do not wait for the content to start promoting---you will inevitably stall! Start promoting and you can gauge the interest in a topic based on the response. You won't waste your time writing a seminar that no one wants, and nothing gets you into action faster than having people registered for an event you are holding!

### 1. SYSTEM PREPARATION

**You will need a registration mechanism.**

- How will people register for the event? Registration gives commitment and allows you to follow-up with them. Ideally registration is linked to your database so you do not have to import or enter registrants into your email management system and create double work. However, do not let this hold you up. Be sure you know in advance HOW you will receive this information if your webinar provider or a partner is capturing registrations.
- Request first name, last name and email address and then send the registrant the phone number or webinar information. This will ensure you actually grow your list.
- Select your vendor and set up everything a week in advance (e.g., GotoWebinar, Anymeeting.com, Talkshoe, FreeConferenceCall.com). Take advantage of free trial periods when you can.
- **TEST out the system so you know how to use it.**
- Be sure you know how to RECORD the seminar. You will want to repurpose this content and can easily have any session you record transcribed. This is leverage at its best.

# Step 3

## PROMOTE YOUR EVENT

### 2. COMMUNICATIONS

#### You will need:

- **Copy (verbiage) on the registration page** that reiterates your Marketing Points from Step 2.
- At least **three emails** to attract in registrants (See Appendix for examples)
- **'Thank you for registering' page** copy
- **'You are registered' for the event email copy** (with call-in or registration information)
- **Reminder email to registrants** day before and day of, one hour before the webinar starts.
  - GOTOWEBINAR and AnyMeeting.com do this for you. You can also "start" the webinar early— at least 15 minutes, if not a full hour with a countdown on the webinar page. For a teleseminar, call in at least 10 minutes ahead of time to be sure you are ready when your attendees arrive.
- **Email IMMEDIATELY following the event:** Send out an email to all attendees, if you can identify who attended, with the link to your web site to take advantage of the offer (or with a click to your email address to respond). Thank attendee for joining today and reiterate the deadline.
- **The NEXT DAY EMAIL:** Send to all your registrants: The recording is now available. State the details of the offer and remind reader of the deadline. You have the option of sending it to your database in general if you want to mine for more sales; however, this creates the expectation that people do not have to attend the event to receive the recording.
- **LAST CHANCE! EMAIL:** On the day of expiration, send one more reminder of the offer and deadline. You can always suppress (withhold) from your list people who have already signed up.

## Step 3

# PROMOTE YOUR EVENT

### 3. PROMOTION CHANNELS

#### To your prospect database:

- You will send three emails to your database. The first email goes out no more than seven days prior to the event. People register for these events on short notice.

#### Examples:

- Hold event on Thursday, announce it Monday, Tuesday, Wednesday.
- Hold event on Tuesday, announce it Friday, Sunday evening, and Monday.
- Develop three variations of an email that recruits people and includes the hook and the details to register.

#### To other people's databases:

- Identify a list of potential partners. You are looking for anyone who would have a list that targets the same audience you want to attract.
- Offer something in return for promoting your offer (e.g. promote their next event to your list, provide a mention at your event or in the next follow-up emails, or be creative).
- Provide a link that will identify their campaign specifically (if possible). This way you can see which partners pulled well and have the most influence.
- Ask a few weeks in advance so you can make sure you get in partner's email queues.
- Provide the email that you want them to send and be sure you know the date it is going out. If you can get someone to promote more than one time- great!

## Step 3

# PROMOTE YOUR EVENT

### Facebook, Twitter, Linked In

- Promote your event through these channels. If your compliance says NO, and even if they say YES, ask people who are in your target audience (friends, current clients, colleagues) to announce your event with a link and an endorsement in these channels. Provide the details you want them to post --- so their comments screen for the right audience. You run into the risk of a wide net here, so be super clear in your title and description as to who you want to come, e.g. "5 Steps to Financial Relief for New Parents."
- Proceed carefully as you leverage targeted discussion groups or forums in which you participate. You want to bring awareness to your event, but you may have to work it into content that you provide, or include it in a closing statement or author's note in a post you make. Comply with your group's Terms of Use.

### Current Clients

- Send a special invitation to your current clients. Let them know that you are hosting this event and while they may be familiar with the content since they are clients, you invite them to come for a "refresher" or reinforcement for their plan. What you really want is for them to invite their friends. *"If you have any friends or family who may find this seminar valuable, please send them this link...I appreciate your help."*
- Send this email ONCE in lieu of the three emails that you use to send to your prospect database. You want to invite clients, but you do not want to over do it.

## Step 4

# HOLD YOUR EVENT

### **THE ACTUAL EVENT**

When you host your event, ideally you will have numerous participants on the line or on the webinar. No matter how many people show up, act as if it is full (virtual) room and present in the same manner as you would to a large group of people. You are recording the session, so whether there are two listeners or fifty or two hundred, you will want high quality content. Ultimately, any one listener could be the ideal client you want. If your fear is that no one shows up, do not worry. If you had more than a few people register after promoting the event significantly, there is an interest. The “show-up” rate is going to vary and you must move ahead as planned. This way you can record the session, turn it into another packaged content offering, and leverage the time and energy you spent creating the session.

### **CONTENT**

This is the meat of the seminar. You will spend most of your time here on the actual training you are sharing. Assume you need to fill 75% of your seminar “length” with content. Make the content valuable and information-packed. Show you know their pain and resolve it. Give away your best content for free! Remember, human nature is still that people do not do-it-themselves, so you have nothing to lose by sharing. You are building trust and helping potential clients get to know you and your style. You are building rapport. You want to demonstrate your expertise with your niche. Tailor the message to your ideal client. Do not use messaging for one size fits all. Throughout the content, reference by example (not a testimonial!) how your work/ having your involvement made a difference in someone’s life. “I have a client---<describe client e.g. 40-year old woman, single, etc.> who experienced <outcome and emotion> as a result of our work together.” People will begin to picture working with you.

### **OFFER**

In Step 1, you created your offer. **You will mention your offer three times in the seminar to:**

- Maximize “time on call” by participants. If they know there is value at the end, they will be more likely to stay with you.
- Build anticipation about the offer; and, ultimately,
- Increase your conversion rate for the offer.

## Step 4

# HOLD YOUR EVENT

### **The three mentions of the offer occur:**

1. At the beginning, during the set up. Launch with “Today is FULL OF VALUABLE INFORMATION and you won’t want to miss a minute!” Tell the audience in the introduction that there will be a special offer at the end they won’t want to miss...

2. Half way through the CONTENT, mention again that you will have an offer at the end they will definitely want to hear (you can hint at what it is or even quickly state what it will be about or related to).

3. In the last 5-8 minutes, you will make your offer. This offer has to stand out—what are you giving to someone to make them act RIGHT NOW to sign up for the next action? Be EXTREMELY clear with the next action you want someone to take.

- Make it EXCLUSIVE “*only through this Webinar*”
- Keep the timeframe for the offer SHORT. Maximum of 72 hours.  
*When you call to schedule your free consultation within the next 48 hours, you will receive (Promotional Pricing or the Free Thing).*

## Step 5

# LEVERAGE YOUR EVENT

### YOU'RE DONE, NOW WHAT?

After you are done with the webinar or the teleseminar, decide how you will use the valuable content you have created.

- Will you transcribe it for an e-book?
- Will you create a workbook out of it?
- Will you turn it into a video for your website?
- Will you package it up as the 'special bonus' for your next webinar?

### GET INTO ACTION!

The best part about teleseminars and webinars is the short lead time to launch. Simply decide that you will host a call or webinar, decide when, promote it, create it, and follow through with the process. You can hold a successful webinar or teleseminar with only three weeks lead time (even less if you are aggressive and have a list or a solid network already)!

Your first step is simple: Look at your calendar and select a date for your event. Then, work backwards to map out the timing of each the elements you need to have in place. You can use this guide and literally mark dates next to each of the elements within each step.

Go now!

#### Fill in the Blanks:

- When is your event (date, time, length)? \_\_\_\_\_
- What is the name of your Event? \_\_\_\_\_
- What is the Hook? \_\_\_\_\_
- Will you hold a teleseminar or webinar? \_\_\_\_\_
- Who is your service provider? \_\_\_\_\_
  - o Do you need to set up an account? \_\_\_\_\_
  - o If yes, is there a free trial period? \_\_\_\_\_
    - How long? \_\_\_\_\_
    - When would you have to sign up to meet your event date?  
\_\_\_\_\_

Now step through the guide and prepare your system, create your communications, and determine your promotion channels.

# Appendix

## SAMPLES

### **EMAIL 1: Mailed Monday prior to event to Clients & Prospects**

#### **SUBJECT LINE: Goal Setting for 2011 - Teleseminar on Thursday!**

~Contact.FirstName~,

I don't know about you, but I always enjoy November. Yes, we all eat too much, but the warmth and festivity that comes with the preparation for the rest of the holiday season energizes me every year.

Of course, all too fast, we eye the NEW YEAR, with all of its possibilities and all of its opportunity for fresh starts and the chance to *FINALLY* (insert your postponed goal here).

Have you clearly outlined what you want? Have you written down your 2011 Goals? Let me help you! As you may know, Goals Setting is one of my absolute favorite planning endeavors, so I am hosting a free teleseminar on Thursday, December 2nd at 2:00pm. I will walk you through two of my favorite methods of Goal Setting that I use to achieve success. I will lead you step-by step through the process --- it is easy to follow and fun to do!

After this teleseminar, you will be able to relax and enjoy the rest of the year knowing that you have a solid foundation for goal success in 2011.

Join me - [click here](#) to receive the call-in information.

Sincerely,

~Kristin

P.S. Start your year off right - [Get clear](#) on your goals.

*"The discipline of writing something down is the first step toward making it happen." - Lee Iacocca*

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### **EMAIL 2: Sent Tuesday prior to event to entire database again (even if people already registered since it serves as a reminder or gives registrant ability to forward the email)**

#### **SUBJECT LINE: Will you join me on Thursday?**

~Contact.FirstName~,

Today is the last day of November. You'll be launched into a new year before you know it.

Have you clearly outlined what you want to achieve or change next year? Have you outlined your goals and set deadlines? Let me help you! As you may know, Goal Setting tops my list of favorite exercises to lead, so I am hosting a free teleseminar on Thursday, December 2nd at 2:00pm. I will walk you through two of my favorite methods of Goal Setting that I use to achieve success. I will lead you step-by step through the process --- it is easy to follow and fun to do!

# Appendix

## SAMPLES

### **Set Your Goals for 2011 - 30 Minute Teleseminar**

Thursday, December 2nd 2:00pm PT

Click [here](#) to receive the call-in information.

This seminar will help you relax and enjoy the rest of the year knowing that you have already prepared for 2011 and declared what you want.

Sincerely,

~Kristin

P.S. Join me and start the year you want! Click here to receive the call-in information.

*"Right now is a good time." – Tote Yamada*

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**EMAIL 3: Sent Wednesday prior to anyone who has not yet registered. If you are unable to suppress names who registered, send to all.**

### **SUBJECT LINE: Tomorrow at 2:00pm --- GOAL SETTING 2011**

~Contact.FirstName~,

The NEW YEAR is just around the corner. December 1st means we have one month until the Fresh New Start we all look forward to each year.

Have you clearly outlined what you want? Have you set your deadlines for you goals?

Let me help you! As you may know, Goal Setting is one of my absolute favorite planning endeavors, so I am hosting a free teleseminar on Thursday, December 2nd at 2:00pm. I will walk you through two of my favorite methods of Goal Setting that I use to achieve success. I will lead you step-by step through the process --- it is easy to follow and fun to do!

### **Set Your Goals for 2011 - 30 Minute Teleseminar**

Thursday, December 2nd 2:00pm PT

Click [here](#) to receive the call-in information.

After this teleseminar, you will be able to relax and enjoy the rest of the year knowing that you have a solid gameplan --- with deadlines---for goal success in 2011.

Sincerely,

~Kristin

P.S. Join me and start the year you want! [Click here](#) to receive the call-in information.

*"A goal is a dream with a deadline." - Napoleon Hill*

# Appendix

## SAMPLES

### **TO REGISTRANTS ONLY: REMINDER DAY BEFORE (Wednesday)**

**SUBJECT LINE: Schedule Snafu - TELE-SEMINAR is 1:30 PM Thursday**

*(this is the actual one I used which allowed me to relate to my niche in the copy...yes it really was an error on my part).*

**Usual SUBJECT LINE: Our Goal setting call is tomorrow – make sure you join in!**

~Contact.FirstName~,

I am so happy you will be joining me for my tele-seminar on Goal Setting. It is now going to start at 1:30pm. Please update your calendar.

If you are a parent, you will appreciate this “goof” in scheduling. It’s a early pick-up day my son’s school on Thursday which of course is exactly during the time when I had the call scheduled. Oops!

So, the call will start 30 minutes earlier. I hope you can still join me.

GOAL SETTING - Achieve What You Want in 2011  
Thursday, December 2nd 1:30pm Pacific

*INSERT CALL INFORMATION HERE or STATE “Please see your email for a reminder from XYZ Webinar provider for details to join.”*

Talk with you tomorrow!

~Kristin

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### **TO REGISTRANTS: ‘DAY OF’ EMAIL (Thursday – 30-60 minutes prior)**

**SUBJECT LINE: Your (webinar or teleseminar) is starting very soon**

~Contact.FirstName~,

Our call starts in just a few minutes... Join me -- you’ll be glad you did. You’ll get to view your Big Picture instead of the day to day “Stuff.”

GOAL SETTING - Achieve What You Want in 2011  
Thursday, December 2nd 1:30pm Pacific

*INSERT CALL INFORMATION HERE or STATE “Please see your email for a reminder from XYZ Webinar provider for details to join.”*

Bring paper and a pen or a cool application on your iphone or laptop that lets you draw and write. Talk with you in a few!

~Kristin

# Appendix SAMPLES

## **EMAIL IMMEDIATELY FOLLOWING THE CALL (Thursday)**

### **SUBJECT LINE: Make sure you lock in 2010 Prices!**

~Contact.FirstName~,

Thank you to everyone who joined me today for the Tele-seminar Goal Setting: Achieve What you Want in 2011. I trust you feel more focused than ever for the year ahead. I will be sending out a recording of the call tomorrow in case you want to go back and revisit any of the exercises.

I do want to call out the deadline for the special offer I made at the end of the call.

Our prices are increasing by \$300 on January 1, 2011. You can not only lock in 2010 prices, but also have full support through the end of 2011 (instead of 6 months) and hold your intake session in January (by the 15th) if you can't fit it in in December.

Here's the deal:

1. Call me at (415)409-6402 or reply to this email by December 10th and Say "I want to lock in 2010 prices and hold a spot."
2. Hold your free consultation, if you want one, in December or early January.
3. Have your Intake session and pay your \$1900 deposit by January 15th.

Create an abundant 2011 for you and your family!

Sincerely,

~Kristin

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## **NEXT DAY EMAIL WITH RECORDING (Friday)**

### **Subject Line: Here is the recording and a special offer for you**

~Contact.FirstName~,

Thank you again to everyone who attended the (EVENT NAME) live yesterday. I realize we had a few communications errors regarding the time of the seminar, so if you missed it, or you want to hear it again to walk through the exercises, you can access the recording here:

[LINK TO CALL OR WEBINAR]

#### **SPECIAL TELESEMINAR PROMO:**

As you will hear at the end of the call, our prices are increasing by \$300 on January 1, 2011. I only have room for a few clients each month so you will not want to miss this opportunity! You can not only lock in 2010 prices, but also have full support through the end of 2011 (instead of 6 months) and hold your intake session in January (by the 15th) if you can't fit it in in December. Your friends also qualify, so feel free to share this offer with anyone you know who is seriously considering a financial plan (make sure they mention you so we can say Thank you!).

1. Call me at (415)409-6402 or reply to this email by December 10th and Say "I want to lock in 2010 prices and hold a spot."
2. Hold your free consultation, if you want one, in December or early January.
3. Have your Intake session and pay your \$1900 deposit by January 15th. To take advantage of the special offer:

# Appendix

## SAMPLES

Go out and create an abundant new year for your family!

Sincerely,

~Kristin

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### LAST CHANCE EMAIL!

*In this example, the email went out a few weeks later to leverage the end of year. Ideally, you would send this within five days of the event. Shorter deadlines lead to higher conversion in most cases.*

#### **SUBJECT LINE: Last chance before the new year!**

~Contact.FirstName~,

Here we are in that “throw away” week between Christmas and New Year’s. You may be on vacation, or having a quiet week at work but usually it is a strange in-between time where you have not yet mustered the energy to jump on your goals but you’re itching for that fresh start.

To help you focus on what you really want in 2011, I encourage you to write down your goals. If you missed the tele-seminar I held at the beginning of December, you can [listen](#) to the recording.

Use this week to do something --- decide what you will accomplish in the new year.  
Best wishes for a prosperous & fulfilling new year!

Sincerely,

~Kristin

P.S. Remember, we are extending 2010 rates for any intake session completed by **January 15th**. We have room for only a limited number of new clients. [Make your appointment](#) today!

*“The problem with doing nothing is not knowing when you’re finished.” - Ben Franklin*

# Appendix

## SAMPLES

### REGISTRATION PAGE EXAMPLE

This example is from a call I held for Financial Advisors.

**next10Clients.com**

**Today is January 31st. Are you where you want to be with your financial planning business? Are you on track for your 2011 goals? Did you set goals?!**

As I expect you realize, I am committed to helping financial advisors design, grow, and enjoy their planning and wealth management practices. That's why I am hosting a complementary 45-minute teleseminar on February 1st to keep you focused on your goals!

#### **How to Leverage February - December to Create Practice Abundance in 2011.**

Tuesday, February 1st

10:00am PT/12:00 pm CT/1:00pm EST

On this content-packed free call, you will learn:

- Two methodologies to set goals that matter to you
- Structures you can use to stay on track
- How to attract more clients you actually like

Even if you have had a phenomenal January --- and I hope you have --- you'll want to hear these tips to accelerate your abundance for the rest of this year!

#### **REGISTER NOW:**

First Name \*

Last Name \*

Email \*

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Visit  
**kristinharad.com**



**p** 415.409.6402

**f** facebook.com/  
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**t** @KristinHarad

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