THE MINDSET METHOD

PILLAR 2: Client Experience

Strategy 7 Host Awesome Client Events

"Perfection is not attainable, but if we chase perfection we can catch excellence."

Vince Lombardi

Host Awesome Client Events

WHY is this Important?

When it comes to your best clients, you probably already really enjoy spending time with them and of course, want to attract others just like them. When you commit to a tradition of predictable, client-focused, and engaging client events, you create a wonderful opportunity to spend even more quality time with your best client group.

With well-designed and well-planned client events, not only do you have an opportunity to engage with your best clients in a fun and interesting setting, but you may also meet your clients' friends and family. This can make for a more enjoyable event, and you may have the opportunity to be introduced to future potential clients.

These tremendous value-added events can inspire conversations your clients have with others that create the 'tipping point' for friends and family who come to realize they have an underwhelming Advisor. This is definitely a brand differentiator in delivering a client experience that goes above and beyond client expectations.

WHAT You Can Expect from this Best Practice

- Learn about various types of events you can offer to your clients.
- Decide which types of events are the best fit for your clients, your team, and your business.
- Follow a well-defined process to successfully plan, deliver, and follow up for every client event.
- Create an excellent first impression by sending an invitation that is inviting and which predisposes a client to want to attend your event.
- Follow a process the day of the event to ensure event venue and logistics are ready to go.
- Leverage your Strategic Partners by inviting and/or having them as guest speakers at events.

HOW to Get Started

Determine Which Events Are the Best Fit for Your Clients

1. Review **Types of Events** to get a sense of the different types of events you may wish to host.
    - You may wish to offer a mix of these events to ensure you are covering all aspects of your Ideal Client group.
    - Be careful of consistently engaging only a subset of this group at the expense of alienating the others because you are choosing events that are too specific.
    - It is also important that some of your events are intended for couples to ensure both individuals in the relationship feel valued and appreciated.
2. Meet with your team to establish which type of specific event(s) you believe will be meaningful for your high value clients and manageable by your team. There are so many different types of events for you to choose from, but we have provided the following lists to get you started:
    - **Client Appreciation Event Sample List**
    - **Educational Event Sample List**
    - **Lifestyle Events Sample List**
3. Strive to choose an event strategy that creates a 'tradition' your clients can look forward to in terms of the event theme and time of year.
    - Consider the region or city you live in, and the demographics of your clientele, to ensure you are creating events that you know your clients would thoroughly enjoy in an 'exclusive' manner.
4. Identify how many events are reasonable over the course of the year for your clients and your team.
    - At minimum you should be doing client events once a year. Many teams offer them quarterly, or more frequently.
    - From time to time, you may be affiliated with a firm or strategic partner who offers an event to be available to your clients which you believe they will value. This is a one-off event that does not need to be turned into a 'tradition' and will simply compliment your annual event strategy. The same can be said for other extraordinary events that may come to your city that you want to share with your clients. In other words, if a great opportunity comes up – take it!
5. When you create 'traditional' events, you build efficiencies around the process of scheduling, preparing, and delivering the events. You will want to capture all of this in a process, so it is repeatable.
6. Use the **Client Appreciation Event Process Sample** to get you started.

Preparing for Your Event

1. Decide to start preparing for your chosen event using the **Client Appreciation Event Checklist. This can be** used for any type of event you plan on hosting.

2. If the event is something that does not already have a fixed venue (i.e., a sporting event, gallery event, concert, etc.), choose your location carefully using the **Event Location Checklist**.

    - Think specifically about attractiveness and accessibility for your Ideal Client Group. If they are older, they may not want to drive far, or drive in the dark during the event, and will prefer a venue that has plenty of easy-access parking and building access.

    - Virtual Events are becoming more popular for several reasons and provide many benefits. These benefits include easy access, low-costs, and the ability to record for replay. If you are planning to host a Virtual Event, use the **Virtual Event Checklist** to ensure it is delivered professionally.

3. If you are dealing with a third-party for your event coordination, make sure you have a core contact name and number for everything related to your event. In this way, details and requests are not lost in the shuffle.

4. Review **Inviting Clients to Events** to ensure you send out invitations that make an outstanding first impression of your event, so your clients not only want to participate, but are also eager to bring a friend or family member with them to enjoy the occasion.

    - Invitations for events should be sent one month in advance of the event.

    - Refer to the **Event Invitation** and **Invitation Letter to Workshop** samples.

5. Encourage your best clients to share your event with those important to them without asking them to. Having access to potential clients for these events is always the second objective – the primary objective is always to show your absolute best clients a great time! You can subtly encourage them to bring guests by simply including additional ‘tickets’ in their invitation. For example, if you invite a couple to your event include 4 ‘tickets’ in your invitation. This does a few things: first it creates a better perceived ‘value’ of the event, it also serves as a tangible reminder they can keep somewhere in their home to remind them of the upcoming event, and lastly, they will automatically start thinking about who they can bring.

    - Review the **Send Event Tickets** and create your own branded tickets.

3. Be sure to acknowledge each RSVP you receive by email to let them know it was received and confirm how many attendees they will be bringing.

4. Keep your attendee list up to date and accurate at all times.

5. One week before the event, review your checklist to make sure:

    - Your event attendee list is up to date.

    - You are on track for all critical tasks.

    - You have sent a confirmation to any third parties assisting you with the preparation, delivery, or hosting of any aspect of your event.

6. Use the **Event Confirmation Call Script** to call each of your event attendees the day before the event.
7. If the venue is large, you may also want to email a map of the venue along with directions to the event location.
8. Make sure you are referring to the checklists to ensure everything is on track for event day (venue, food, Guest Speakers, souvenirs for guests, etc.).
9. If you are facilitating or introducing other speakers, have your script ready to go – it should be written down, practiced, and rehearsed!

Event Day

1. Be ready and well rested – it is show time. Your participants will match your energy so be inspired and excited.
2. Dress the part accordingly based on the event type, which may vary widely.
3. Show up early to ensure everything at the venue is exactly as it should be inside and out.
    - If the venue is larger, have signs in the lobby or entrance to guide your guests to the right place.
    - Have others on your team there to assist with various aspects of Event Day.
4. If there is technology involved, make sure you are launching and testing this well before event start (video, tv, PowerPoint, virtual aspects, etc.).
5. Start the event on time and have a great time with your best clients!
    - If there is an Agenda or timeline for the event, be mindful to keep on track as best as possible.
    - If required, have scheduled breaks so attendees can stretch, get a drink, or go to the washroom.
    - Have beverages and food brought in/served where appropriate.
6. Wind down the event on time.
    - Be sure to thank everyone for joining you.
    - Provide any ‘souvenirs or take-aways from the event.
    - Spend time saying good-bye to guests individually as they get set to leave.
    - Pack up all items that are yours and check for anything left behind by clients and bring those with you too.
7. The day after the event, send along a Thank You Card to everyone who attended the event.
8. Meet with your team to do a debrief on the event.
    - Discuss what worked well at the event and celebrate. Discuss what can be improved and take steps to implement for the next round

Types Of Events

There are many good reasons to include events in your client experience, some of which include the following:

- Add value to client relationships.
- Provide the opportunity to meet prospective clients in a non-threatening setting.
- Allow clients to introduce their financial professional to people they know.
- Create consistency and congruency to the notion of the advisor serving the interests of a small exclusive club.

An annual schedule may include three distinct types of events:

- Client Appreciation Events
- Educational Events
- Lifestyle Events

1 Client Appreciation Events

A client appreciation event enhances your client relationships. There are two distinct styles: the inclusive and the exclusive. Some Advisors present only one type; others offer a combination of both. At minimum you should host one focused Client Appreciation Event each year.

Client Appreciation Event - Inclusive

This type of event is planned for many attendees at a low cost per head, allowing you to reach more clients for a reasonable cost. You can offer these events to most of your clients.

Some ideas for an inclusive Client Appreciation Event include a screening of a new release film, a summer BBQ in the park that includes face painting and clowns for the kids, or a day at the baseball park with tickets for a hotdog and drink.

Client Appreciation Event - Exclusive

This type of event reminds your best clients that they belong to an exclusive group. These events are designed for a small group of your best clients and can involve a high cost per head (though the quality and appeal of the event itself matters more than its cost). The benefit to this approach is to have a more intimate gathering that allows meaningful interaction with each participant. This type of event would be offered to either all AAA clients or a select group of AAA clients who have been actively promoting you to people they know.

An exclusive event could involve an afternoon at the racetrack, high-end dinner or dinner cruise, a night at the theater, wine tasting and/or guided winery tour, or a tour of the local holiday lights.

2 Educational Events

These events offer clients additional information into financially related topics.

While for many advisors, educational events make up their entire event schedule, we recommend that you also include Client Appreciation and Life-Style Events. For the most part, clients rely on their advisor to deal with the financial side of things, so too many educational events can be counterproductive. That said, your clients and prospective clients will still appreciate educational events about topics they are interested in. To ensure the success of such events, survey your clients and prospective clients to determine what financial topics they would like to learn more about.

Appropriate material must be coupled with strong promotion. Create an interesting title for the workshop to grab attention.

For example, do not promote a seminar about Education Plans (RESP in Canada or 529 Plan in the United States). Instead, offer an Estate Planning Workshop/Symposium that includes education plans as a strategy.

But even in this instance, promoting an Estate Planning Workshop or Symposium will not be as effective as promoting a:

· *How to Disinherit the IRS* Symposium (if you American) OR *How to Disinherit the CRA* (Canadian)

A catchy title and attention-grabbing subject matter will encourage your clients and their guests to attend. Remember Rule #1: Never promote a 'seminar.' Seminars can have a bad connotation. Instead, use terms like *symposium* or *workshop*.

Perception is everything.

3 Lifestyle Events

Lifestyle events can be the best part of an event series for many advisors and clients because they cater to the personal interests of clients and people they know.

Clients are typically more disposed to bringing someone they know to a Lifestyle event. As a result, it can be the best opportunity for an advisor to be introduced to the people whom their clients know and like. Lifestyle events can be a key component of your event series. Use Client Profiling information and/or survey your clients to determine what types of Lifestyle events will interest them. This way, you know that your event will be well-attended, and that your clients will likely bring friends or family – prospective clients – to the event.

Client Appreciation Events – Sample List

There are many kinds of client appreciation events you could host and of course, the theme of the event should be one a majority of your ideal clients would enjoy.

Here is a variety of Client Appreciation Events you may want to consider hosting:

- Fine Dining
- Wine Tasting
- Golfing
- Festival of Lights Holiday Light Tour
- July 4th Picnic & Celebration (US)
- July 1st Picnic & Celebration (Canada)
- Attending a Sporting Event (Hockey, Football, Baseball, etc.)
- Attending an Arts & Cultural Event (Concert, Play, Museum, etc.)
- Private screening in a movie theatre
- Dinner Cruise
- Whale Watching (or other nature/environmental attractions)
- Annual Shredding Event with Pancake Breakfast
- Private tour of a local attraction

The event that will be most suitable and appropriate for your AAA clients will be based on what you know about each of them (i.e., their personal interest information).

- What are their hobbies and interests?

This will tell you exactly the kind of event your clients will appreciate and want to attend. There may also be some geographical tendencies where you live that make certain activities accessible and enjoyable.

Educational Events – Sample List

There are two different kinds of educational events you could host:

- Related to their Wealth
- Related to General Life.

Here are several types of educational events related to WEALTH, which lend themselves to having your traditional Strategic Partners participating partially or fully:

- Tax Planning
- Estate Planning
- Risk Management (Family Security or Insurance Solutions)
- Planned Gifting
- Executorship 101
- Business Succession & Other Important Corporate Strategies
- Economic Updates & Market Overview

These events require qualified professionals and reliable, accurate information. They are important, but often this content can and should be communicated one-on-one when you are working with your clients in the comprehensive wealth planning & investment management process. Some clients are drawn to learning more and will enjoy these events, while others will gravitate more to General Life educational events.

Here are several types of educational events related to GENERAL LIFE, which will also require an expert on the topic. The expert may also be part of your personal or professional networks:

- How to Protect Yourself from Identify Theft
- Learn How to Effectively Use Your iPad
- How to Teach Your Kids about Money
- The Psychology of Retirement
- What to Consider When Buying a Recreational Property
- How to Prepare for Downsizing

Lifestyle Events – Sample List

There are a wide variety of Lifestyle Events you could host, and of course they should be reflective of the interests and hobbies of your best clients – this is where gathering the Client Profile information is very important.

These events also require trained professionals (ie. not you) to facilitate them so think about your professional network, personal network, client-base and non-traditional strategic partners. You probably know a few individuals already who would love the opportunity to provide a value-add to your clients, because it promotes the goods and/or services they provide – it's a fun way for them to increase awareness.

Here are several types of Lifestyle Events you may want to consider hosting:

- Cooking Classes
- Golf Lessons & Instruction
- Garden Workshops
- Travelling Tips & Recommendations
- Wine Tour and Learning
- Quilting or Cross-Stitching
- Book Signing & Reading

These events can be done with 'pockets' of high-value clients in the event that you have more than one distinct group of interests. For instance, perhaps there is one group who would love to take cooking classes and the other wants to learn more about travelling. Between the two, you are able to cover off the majority of your high value clients. It will be difficult to find one single lifestyle event that every single one of your high value clients would be interested in.

This is also a great place to tap into your team because everyone on your team has unique interests and hobbies that overlap with some of your clients. The best way to have a top-notch lifestyle event is to have someone champion it that is passionate about the topic. You may be surprised to learn about the interests of your team, and the various professionals and service provides they are connected to, that are absolutely perfect for this type of event!

Client Event Process Sample – *Appreciation Event*

Date: *[Enter Date]*
Person Responsible: *Client Service Manager*
Frequency: *As determined by the Advisor*
Process:

NOTE: This process can be used by the person responsible for coordinating events.

1. Confirm the type of Client Appreciation Event you wish to have and when. This should be a ***Lifestyle Event.***
2. Choose a date, secure the venue, and contact any other third parties needed.
3. Eight weeks prior to the Event, the Client Service Manger will confirm with the Advisor the names of the clients invited to the Client Appreciation Event. You should only consider your **AAA clients.**
4. Six weeks prior to the Event, the Client Service Manager is to confirm the event details with Advisor (this includes date/time/venue) and any third-party vendors necessary to host the Client Appreciation Event.
5. Five weeks prior to the Client Appreciation Event, the Client Service Manager is to order event supplies, including items used to anchor or follow the event and set up catering and audio-visual arrangements (if required). **Important - this time frame may vary depending on venue/vendor requirements**.
6. Five weeks prior to the Event, the Client Service Manager is to prepare the invitations. Use the **Event Invitation Sample** found in the Event folder, sub folder Resources as a guide.
    - Hand-write the envelope
    - Use an interesting postage stamp (do not use a postage meter)
7. Four weeks prior, mail the invitation.
8. Two and half weeks prior to the Client Appreciation Event, the Client Service Manager can confirm the RSVPs and check with the clients to see if they will be bringing guests. The Client Service Manager needs to ask for mailing information for the Guest. Refer to Event folder, sub folder Resources.
9. Two weeks prior to the event, mail a personal card to confirmed guests - refer to **Introduction Kit Handwritten Card for Guests** found in the Event folder, sub folder Resources, with your **Introduction Kit.**
10. Two weeks prior to the Event, the Client Service Manager will confirm with the Advisor the number of attendees expected, and confirm with catering, venue, and vendor contacts (if required).
11. One week before the Event the Client Service Manager will confirm the following:

- Ensure all event materials are on site by contacting the venue.
- If you have invited a guest speaker, confirm that they know where to be and when to arrive and has everything he or she needs (encourage this person to arrive early as well).

12. Day of event:
    - Pre-complete any participant registration forms, and have your assistant gather any other necessary information at the Event.
    - Arrive early, and have your assistant arrive early to help you with all the details.
    - Set up any visual aids and make any last-minute adjustments to the room.
    - Have your assistant give each participant a name tag. Since you should know who is attending before the Event, you can have these pre-printed, but do keep a few extras on hand for last-minute changes. Advisor and Staff need to have name tags.
    - Greet each participant by name as they arrive, and work at making them feel comfortable. This is a great opportunity to connect with your clients on a personal level, and to enhance trust. This goes a long way to creating long-term clients and advocates.
13. One day after the Event, the Client Service Manager will mail out Thank You Cards to all those who attended. See **Post Event-Thank You Card Template** in the Event folder, sub folder Resources.
14. One week after the event, personally call all event attendees to thank them for coming and ask if they have any suggestions or feedback for next time. Document feedback, this will serve to help fine-tune future events.

Client Event Checklist

Note: This checklist can be used by the person responsible for coordinating events and should be modified as required based on the specific event.

❒ 90 days (or more) prior to the event, confirm the type of client appreciation event you wish to have and when.

❒ 60 days (or more) prior to the event, identify if outside experts and/or specific venue are required, based on the event.

   ❒ RSVP your event expert and confirm date, time and place.

   ❒ RSVP your venue and confirm logistics for date, time and place.

❒ 45 days prior to the event, identify those you wish to invite: your AAA or preferred clients.

❒ 45 days prior to the event, create the invitations. Make them interesting & never email them.

   ❒ Theme or brand the event with a catchy name.

❒ 45 days prior to the event, coordinate event logistics (food, supplies, IT, order item to anchor event – the gift)

❒ 30 days prior to the event, mail the invitations and carefully track RSVPs.

❒ 30 days prior to the event, ensure you have the anchor gift for the event.

❒ 2 weeks prior to the event, have someone from your team go to the venue and finalize the details (if required).

❒ 2 weeks prior to the event, send confirmations to clients who have RSVP'd and follow up with those who have not RSVP'd.

❒ 2 to 3 days prior to the event, make confirmation calls to all attending the event.

❒ Day OF the event, have someone from your team arrive early to make sure everything is in order. Make sure you and your team are on time.

❒ Day AFTER the event, mail thank-you cards. Be sure to include the event anchor if it was not distributed at the event itself.

❒ On your next Relationship Call, thank them for coming and ask if they have any suggestions or feedback for next time.

Event Location Checklist

Before booking your space, take the time to enter the building and the room as if you have never been there before. Use the following checklist to evaluate the location.

- ❑ What is your first impression of the building/room?
- ❑ What hesitations do you have?
- ❑ What can you do to encourage participants to feel comfortable, relaxed, and confident in their decision to attend your event?
- ❑ Is the building/suite/room an appropriate business environment? Does it impart a professional atmosphere?
- ❑ Is there adequate parking?
- ❑ Is public transportation available?
- ❑ Can participants enter the building after hours?
- ❑ Is it a safe environment? Is the building in an isolated area? Is there adequate outside lighting?
- ❑ What arrangements will you have to make with building management or security?
- ❑ When participants enter the building, will they know where to go? (Each participant should receive an invitation with clear and precise directions)
- ❑ Is there an elevator, or are participants required to climb stairs? (Stairs may be a problem depending on the age/physical needs of your participants.)
- ❑ When participants reach the correct floor, will they know where to go? Is the suite/room number clearly marked? Will you have a "greeter" to escort participants to the appropriate room?
- ❑ Where will they put their coats, boots, etc.? Is the space adequate?
  What noise or distractions do you have to deal with?
- ❑ Does the room have windows? Adequate ventilation? Plants?
- ❑ Are there sufficient chairs and are they comfortable? What is the seating configuration?
- ❑ Is there a large enough table, or are there several tables around which everyone can be comfortably seated?
- ❑ Is there room for your easel or presentation board?
- ❑ Are there beverage facilities? Is a table available for setting out refreshments? Can this be done in an adjacent area by your assistant?
- ❑ Are washrooms convenient and available during the hours you hold the event?

Virtual Event Checklist

Virtual Events are a great alternative to In-Person Events in instances when you are not able to host the event in person. This is a solid solution if your participants are geographically dispersed, or the participants have mobility issues and travelling to and from an event is not possible. This is also a great back-up if an event is compromised due to inclement weather making driving unsafe. A virtual event also allows you to easily access experts and speakers across North America without incurring additional travel and accommodation costs to do so.

Some events naturally lend themselves to the virtual event platform, while others may be more difficult. It is a wonderful alternative to help you stay connected to your clients and prospects in a variety of situations.

Setting the Stage

Depending on how experienced you are with Virtual Events, and the necessary set-up, you may want to schedule a full test-run prior to the live Virtual Event. If this is your first Virtual Event, we highly recommend this. Otherwise, if you have done this before, you can follow the remainder of the guidance provided in this resource.

First, it is recommended that the host or organizer is 'Virtually' logged on to the Event about 20-30 minutes before it starts to ensure there are no technical issues, and so that everything can get fully set up. All panelists or guest speakers should be logged on at this time to have a full technical roll-call.

It's a good idea to have someone on your team sign up as a participant so they can experience the event just as your clients and prospects would. This will also alert you to any issues your participants may have logging on. This team member should log on about 10 minutes after the main host & organizer have.

Some virtual platforms have guests wait in the 'Lobby', so you can let them in a few minutes before the official start time. In this case, it's best to have a professional screen (ie. Presentation title slide) there to greet them so they know they are in the right place – you don't want people logging onto a blank screen or seeing other items not intended for audience view – refer to **Getting Ready** below.

If you're the host and presenter, it is recommended you have someone on your team as the technical coordinator and moderator for the event to facilitate troubleshooting, record the event (if appropriate), and manage chats, questions, or raised hands from the event participants.

Virtual Event Inspiration:

Virtual Tour of Paris (or any other wonderful city)

Deluxe Virtual Cooking Classes (Food is sent ahead for cooking during the class)

Standard Cooking Classes (ingredient and kitchen tool list sent in advance)

Motivational Speaker & Astronaut, Chris Hatfield

If, during the technical check you are having issues accessing or logging on, try a few times. If the problem persists, immediately send a cancellation of the original event link, followed directly by the new link to all participants.

Getting Ready

- Forward your phone lines and shut your office door to avoid unnecessary interruptions.
- Close all unnecessary programs on your PC, and/or anything that may reveal private or confidential information which does not belong to the clients attending the meeting (especially pop-ups from Outlook, Skype, IM, etc.).
- Have all items you wish to share, open and ready-to-go on-screen during your event/meeting (minimized).

Visual Check

- Set up the screen or window you do want to share – check 'audience/participant view' to ensure they are seeing what you believe they are.
- Know how to 'freeze' or 'pause' the screen to allow you to shift items being viewed without looking unprofessional or unorganized to the client (alternately use 2 screens and have one as your 'showing screen' and the other as your 'private working screen').
- If you are using a PC camera and will be visible by the client at any portion during the meeting, check to see your placement on the screen is appropriate (i.e., none of your head or face is cut off on the screen).
- If you are using a PC camera and will be visible, it is also important you are dressed professionally – this is especially important and ties directly to your branding.

Audio Check

- Most programs have the option to log into audio via phone or PC – and in many cases the phone quality is better. The PC audio does sometimes allow additional background noise. This background noise can be minimized or eliminated through dialing in with a headset.
- It is important to not have both the PC audio and phone audio on at the same time as it may produce an echo and compromise sound quality for everyone listening.
- Test the sound quality at the beginning of the call and make changes as required – it is very distracting to participate in a call where you cannot properly hear the other person.
- For larger events, ensure as the host or organizer you can 'mute' all participants, so you do not have unnecessary or unwanted background noise to distract from or ruin your event (we have all experienced this, and it does detract from the event significantly).

- For smaller & more intimate events, you can direct all participants to ‘mute’ themselves and ask that they simply ‘unmute’ when they are directly participating by speaking or asking a question. You should do this at the top of the event as part of the welcome and logistics.

Show Time – Go Time

- Look the part – dress right, have a professional background & ensure there is good lighting.
- Always start the call on time, warmly greet the audience, introduce the guest speaker, and then make sure the participants can see and hear just as well as you can before you officially begin.
- Either you or your moderator can start recording the event.
  - Some programs announce the event is being recorded so everyone is aware and is willingly continuing to participate.
  - If there is no automated announcement about the recording, it is important you tell the audience the event is going to be recorded.
  - If you are recording the event, be sure to let them know if you will be sending them a link afterwards so they can listen to it as a refresher or share it with others they believe may benefit.
- From here, run your event as you normally would – well organized, professional, and fully engaging the participants wherever possible.
- Be respectful of time and end on/or before the scheduled event end time.
- Be aware of any time constraints that may exist on your virtual platform so you do not accidentally get cut off.

Inviting Clients to Events

Client events add value to your client relationships and give you the opportunity to meet prospective clients in a non-threatening setting. Once you have decided on your event schedule, you need to tell your clients about pending events, and invite them to attend.

People will decide a lot about your event - and your practice - based on the invitation you send. Even if your clients choose not to attend a given event, the fact that they have been invited already indicates that you provide great service and exclusive perks to your best clients. They will feel part of a small, exclusive club. Even if your clients do not all act on the invitation, there is validation just from being invited.

A quality invitation is also important because it creates a perception of the type of event you will offer. If you send out shoddy invitations that look to have been hastily prepared, your clients will anticipate that the event will be the same way -- and they will not bother to attend, nor will they bring friends or family members. If, on the other hand, they receive a personalized invitation, carefully laid out, printed in nice type on quality cardstock of an appealing color, they will know that you tend to put care and attention into all you do. They will therefore be predisposed to attending the event.

When someone receives an invitation in the mail, they tend to open it right away, because they know that it is something personal and exciting -- something outside the usual everyday bevy of bills and marketing mail. Therefore, you should use an invitation-sized card rather than a letter. It's best that all the addresses are handwritten on the envelopes, and that you use a real postage stamp. Go the extra mile to make your invitation stand out!

Never Email Event Invitations - Ever

Do not send event invitations by email – they are susceptible to technical problems and sometimes never arrive to the intended recipient. They also do not create a positive first impression and simply cannot convey the importance of an event sitting in an inbox with a myriad of other emails. There is nothing special about an email.

Invitation Tip:

Inside your invitation, include 'tickets' for the event, much like you would receive from a sporting event with the name, date and place. If you are sending it to a couple, include four tickets. This will let them know they are welcome to bring guests to share the event with. Not only will they have the opportunity to bring some close friends or family, it also increases the perceived 'value' of the event. It is a fantastic, low-key way to be introduced to the family & friends of your absolute best clients.

More on this tip on the resource called Send Event Tickets.

Invitation Letter

This letter is for the Preferred Client and Guest

Client Name:

Client Address:

Date:

[Advisor] of [Firm]

Now Presenting Personal Financial Planning Workshops for Clients

Dear [Client]:

I am pleased to announce that we are now offering our preferred clients personal Financial Planning Workshops - (name of your Workshop series).

These Workshops are designed to be given in an informal setting for small groups. This allows me to focus on the needs of the particular group and ensures that your questions and concerns are addressed throughout the Workshop sessions. The material in the (name of your Workshop series) will provide you with an excellent introduction to various aspects of financial planning. Each Workshop is followed by a personal consultation to determine exactly how this information can be applied in your individual situation.

Please contact me at xxx-xxx-xxxx for more information on (name of Workshop series), (and times and dates the Workshops will be offered over the next few months.) You will receive an invitation outlining the topics to be covered for the various sessions. I would encourage all my preferred clients to attend at least one of the Workshops over the next six months.

As you become aware of the various topics being covered in (name of Workshop series) you may think of friends, family or associates who could benefit from the information being discussed. Guests are welcome to attend. As space is limited to not more than 14 individuals per session, we do request that you RSVP for yourself and your guests.

I am confident that this Workshop will greatly benefit you and your family, and I encourage all my clients to take advantage of this unique opportunity.

Yours sincerely,

[Advisor] PS.
*attach your workshop schedule

More on Sending Event Tickets

The inclusion of a physical ticket with the invitation immediately conveys a monetary value of being invited to the event, which is what we want to achieve. In addition, it gives your clients something tangible to put on their fridge, desk, or mantle that reminds them of the upcoming event, which is also great! Finally, when they go to the event, this ticket will have all the details they need to get to the right place at the right time.

Depending on the event and whether you'd like your clients to bring along guests, you may want to include extra tickets. Remember, the primary objective of the event is your clients having a terrific time – with or without their guests. The secondary objective is that you *may* get the opportunity to meet a friend or family member that has been brought along as a guest to one of your events. This person could be a potential future client!

In-house Tickets

Some advisory teams have individuals on their team who are skilled with using Word. This can help you produce professional and inexpensive ticket templates in-house. We recommend you use similar ticket templates for your events, including the basic information: Event name, Date, Time & Location, along with an attractive image or graphic. Be sure to include RSVP information as well. We recommend these tickets are printed on thick cardstock paper to give the look and feel of an actual event ticket.

The golden rule: Keep it simple!

Outsourced Tickets

Ensure the 'wow-factor' of your events by contacting a professional print shop to produce your event tickets. Many options are available locally or online, and for an exceedingly small outlay, you can make your event and invitation feel more bespoke and valuable to your best clients.

Even in small batches, high-quality tickets help to elevate an event and give it a sense of exclusivity for a cost of pennies per ticket. Many printers offer design templates as well, so you can build your own ticket in minutes if you do not have an in-house graphics person.

Event Confirmation Call Script ☎

This phone call is for two and half weeks prior to the Event, for all clients and guests who gave an RSVP, or who were unsure the last time you checked.

“Hello this is {Client Service Manager}. I’m calling for {client}.”

"I am just calling as a reminder about the XYZ Event that {Advisor} is hosting on {date}. Will you be able to attend?"

Will you have a guest joining you?

Wonderful!

(If yes to bringing a guest)- We are looking forward to having both of you attend. What is your guest’s name? {Client} as part of our Event process, we would like to send them an Introduction Kit so they get a sense of us and our approach. Can you please provide the mailing address and we will get that out right away?

{Client} do you need driving directions?”

"Thank you so much!"

(if Client will not be attending) "I’m sorry to hear that. Hopefully we will see you the next time around!”

Answering Machine Message:

For Client who has already RSVP confirmed:

"Hello this is {Client Service Manager} for {Client}. I’m calling as a reminder about the XYZ Event that {Advisor} is hosting on {date} at {location}. Please call me If you have any questions or need driving directions at {your phone number}. I hope to see you there!"

For Client who has not RSVP confirmed:

"Hello this is {Client Service Manager} for {Client}. I’m calling as a reminder about the XYZ Event that {Advisor} is hosting on {date} at {location}. Please call me at {your phone number} to confirm if you will be attending the event, also if you will be bringing a guest. I hope to see you there!"

Strategy 7 Self-Assessment

1) It is recommended that advisors consider including Events as part of their ongoing Client Experience:

- ☐ True
- ☐ False

2) Which type of event is about showing your clients how much you appreciate them and letting them have a great time:

- ☐ Educational Events
- ☐ Lunch & Learns
- ☐ Client Appreciation Events
- ☐ Lifestyle Events

3) Which type of event is about your clients having fun with a specific purpose or theme:

- ☐ Educational Events
- ☐ Lunch & Learns
- ☐ Client Appreciation Events
- ☐ Lifestyle Events

4) Educational Events include a variety of topics, not just financial related and would always be presented by the Financial Advisor:

- ☐ True
- ☐ False

5) Which resource will help you stay on track when planning your next event:

- ☐ Event Location Checklist
- ☐ Client Appreciation Event Checklist
- ☐ Inviting Client to Events
- ☐ Event Confirmation Call Script

6) The purpose of this best practice is:

- ☐ Adopt a proactive approach to integrating Events with your Client Experience
- ☐ To Collaborate and work with you Strategic Partners
- ☐ To deliver a value-add service to your best clients
- ☐ All the above

My Action Items & Notes