Teach Your Clients Well

How to Educate Prospects and Promote Yourself for Maximum Effect

By Peter Montoya

If you host seminars, you've probably wondered at some point, "How much information should I give these people?" If you give your prospects too much information, are also you giving them the idea that they don't need to become your clients? Are you actually making yourself irrelevant?

Give 'Em All They Can Stand

The answer: no. When it comes to seminars, I say throw everything but the kitchen sink at your attendees. Make it relevant, make it clear, but give them information in such volume that the sheer amount of it overwhelms them.

When you do that, attendees see you as a source of vital knowledge and realize that they can't begin to comprehend all this without your help. You're teaching them, and you're also showing them that financial planning is highly complex, so much so that they need your professional assistance.

Hard Copies, Plenty of Notes

I call it "positive overload." There are two ways you can get your attendees into this kind of overload state: give them hard copy handouts loaded with facts, and insist they take notes as you speak.

Provide paper and pens. As you'll remember from your college days, note taking is work. People will fall behind, miss information, and get confused. Give them so much info that they must come to you for clarification – preferably at your office.

Case Study

An accounting team conducts 4-6 seminars per year to inform small business owners on tax issues and small business planning.

- Each seminar has a different topic, and none last more than two hours.
- A seminar workbook – a simple laser-printed booklet, photocopied and bound – helps attendees learn in an engaging way. The book-like formatting allows attendees to "fill in" key terms and concepts, which is a very effective method for adult education.
- The team has a package of materials ready for seminar attendees: workbook, Personal Brochure, article reprints, and more.
- They have a "pitch" ready at the end of the seminar to invite business owners to schedule a meeting, and they schedule as many meetings as possible at the site.
- The team follows up with a phone call 3-4 days after the seminar, asking other attendees if they would like to schedule a meeting.
- About 55% of attendees end up scheduling meetings, and the team converts about 90% of that 55% into clients.
- On an ongoing basis, the team promotes the seminars using direct mail messages, sales letters, and e-mail messages to prior contacts and their current accounting and tax clients. Recipients can either call or go to their website to learn more and register.

Get The Meeting

The goal of "positive overload" is simply to get that appointment. Once you've convinced someone of your value and scheduled an appointment, you revert to patient educator, addressing all their questions in a tightly focused manner. This is the time to show them you can "drill down" to their concerns and be immediately relevant to them.

This is the time to close. This is also the time to impress your prospect with your Personal Marketing materials, if he or she hasn't seen them already. Let's face it, a seminar can really defrost the ice between you and a prospect; handing that prospect a copy of your Personal Brochure can *vaporize* it. In seconds, you go from being a speaker and salesman to a professional, just-like-me human being. In fact, consider scheduling appointments 3-5 days after your seminar, so you have time to drop a brochure in the mail.

By the way, when you are one-on-one with a prospect, information overload is not the way to go. Correspondingly, the Personal Brochure that you send should not be as information-heavy as the "lecture material" from your seminar. While information overload works beautifully in a seminar setting, you'll crash and burn if you're trying to "capture and confuse" in a one-on-one meeting. Educate people to the limit at your seminars, however, and you'll see them flock to you for appointments.

Peter Montoya is President of Peter Montoya Inc. - the only advertising agency in the country that specializes in financial advisors. Check out MarketingLibrary.net for unlimited access to hundreds of marketing articles, letters and invitations for only $10 per month. Learn more at www.MarketingLibrary.net or by calling (888) 730-5300.