



# SUCCESS

## Meeting pointers

Karl Hartey begins a series on running client seminars with a celebration of the concept and a guide on how to get started

**G**ive a hungry man a fish and he will be fed today. Teach a hungry man how to fish and he will be fed for life. So goes the old saying, and it is just as true for client seminars. If I set up a seminar where you could display your skills and range of services, you would no doubt net a good number of clients. But if you learn how to conceive and run your own seminars, you have a means of building a never-ending supply of high-quality, pre-qualified individuals that will become clients, not just for today, but over the years ahead.

I have said for many years that running seminars can seriously damage your wealth if you get it wrong. If you get it right, however, it can seriously enhance your wealth and can be a life-changing experience.

I found inspiration in a presentation by Malcolm Doney, who spoke at an international convention in Toronto in 1995. I am eternally grateful for that talk as it helped to shape my future and my life. My history until then was a financial adviser – advising as a general practitioner in what I class as the ‘bread and butter’ market. It was hard work, there was a lack of quality relationships with clients and there was certainly a general lack of appreciation.

It was mainly evening work, and a lot of travelling was required. I wanted to change my business structure so I would have control of my diary. I wanted to have a regular flow of top-quality clients that would see me in my office, during my office hours. The challenge was how to get to this stage. Doney’s presentation

on seminars transformed my business.

So where do we start? The first important challenge is to define our market. My own market is those aged 60-plus who are looking for guidance on investment, retirement and estate planning issues. What is yours? What type of clients do you want? Age group? Financial net worth? Type of products, services or advice they might want?

Spend a few moments and write down the market you are in today and the market you wish to be in in the future. A knowledge and understanding of your market’s demographics will help you structure your business not just for today, but for the years ahead. You will be able to make decisions about the kind of service you want to provide, and how you want to provide it. Chances are, as

your offer is refined and improved, you will be appreciated more, which will allow you to choose being paid via retaining fees, fees or commissions. What is important is that you gain control of your market and your place within it and structure your activities accordingly.

The logic for running seminars is persuasive. In my first six months in the insurance business I went through three sets of tyres on my car, because I drove 30,000 miles, here, there, and everywhere in search of business. Such freedom was enjoyable, but financially it was devastating because all I did was help to boost the petrol company’s already-swollen profits.

I then read a book which asked why so many sales people get out of bed in the morning and drive 40 or 50 miles before they start selling. Why not find a geographical area that will support the client base we are looking for? This can then be used as the base, with sales activity spreading to say a 30 to 40 minute drive beyond that on all points of the compass – with the clients doing the driving. I find that clients will drive quite comfortably for up to 45 minutes to come to my office or chosen seminar venue.

Demographic changes means that one of the most attractive markets is people approaching retirement. They have more money than ever due to property price increases, the expected surge in the stock market over the next five to 10 years and the money they will inherit from their parents. Crucially, there is a lack of people they can go to who are qualified and sufficiently skilled to provide good-quality financial advice.

There is no point running seminars in a shrinking market. Go where the money is. To perpetuate our piscine analogy, if you want to fish for big fish, fish where the big fish are.

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## Practical considerations

### Where do you start?

The first thing to do is to set dates for your seminars, allowing sufficient lead time (you cannot schedule a seminar for next week, say, because it will simply not work).

It takes approximately eight weeks’ planning to allow for conception, authoring, checking, rehearsal, the writing and sending of invitations to the practicalities of the actual day itself.

An early consideration is the venue. Do you run it from your own premises? Probably not, unless you have large prestigious offices with easy parking and space to seat up to 100 people. So give consideration to other venues such as hotels, stately homes, restaurants or other places of general interest – football stadiums are a wonderful opportunity and most are geared up for this sort of business (and hungry for the revenue it generates).

If you want something unique and memorable, how about a boat trip? I once used an old barge running along the aqueducts of the Welsh borders. Don’t just think of ‘where’, think of ‘wow’ as well.

When considering the venue, one of the most important issues is access. Not only must the venue be easy to find (a lost client is a lost client!), there must be a plentiful supply of car parking, with no steep hills or flights of steps for people to climb, especially if the target market is getting on in years.

The reputation of the hotel or the venue needs to enhance the ‘wow’ factor – it should be somewhere people know and want to go. Food is important, so check it out yourself. Do not rely upon what people say, go and taste the food yourself, see the service standard, are the waiters or waitresses pleasant people or are they miserable? The hotel service standards will be a direct reflection upon you so you need to ensure the standards are right.

Check for simple things such as the quality of the furnishings – are there holes in the carpets, are there cigarette burns in the seats, is the paper on the walls starting to peel, when was it last decorated, is it modern or is it dated?

Delve into the detail: does the cutlery look good, are the knives and forks clean, are the wine glasses clean, are the napkins cotton or paper, are the waiting staff dressed well?

### What about the room you will be using?

◆ The room layout should include a registration desk where you can give out name badges, take coats and provide literature. Name badges should make it clear who is an existing client and who is new, as existing clients are good ambassadors. Simply using two colours will do the trick.

◆ There should be two rooms for the presentation, including a reception room where people meet (laid with tables holding the morning papers, any articles that may be applicable or company brochures).

◆ Tea, coffee, biscuits and Danish pastries should be served and there should be a choice of water, orange juice, tea, coffee and decaffeinated coffee – all fresh and smelling nice to start the good ‘wow’ feeling. This room will be used for the break and for lunch or supper.

◆ The main presentation room will be set in a theatre style. If you are expecting, say, 50 people, put 40 chairs out. This means that when everyone arrives it will appear that more people will have turned up than expected.

◆ The presentation room should be well lit; never speak from the shadows. People need to see you, to see the whites of your eyes and the whites of your teeth, so ensure that there is adequate lighting. We incorporate spotlights we have purchased ourselves.

◆ Research the room before the day to make sure it is right: are there adequate plugs to run the power, the lights, audio and software? Do not rely on things being done at the last minute – you do not need the stress.

◆ Windows are important. Most rooms will have large windows to let in natural light, which is great; however when you are running a seminar and using visual equipment, it is important that you can create darkness in certain areas. You do not need the sun shining through and creating white light upon the screen so nobody can see your slides.

◆ Also check that the roof is a solid roof and not made of glass – imagine giving a talk in a conservatory type of room with traditional British weather throwing it down with rain. You would not be able to hear yourself speak – and neither would anyone else.

**Next month’s article will focus on inviting clients and ensuring you get a good response**