

SEMINAR MARKETING STRATEGY

PLAN & EXECUTE A SUCCESSFUL SEMINAR



DMI

FOR FINANCIAL PROFESSIONAL USE ONLY. NOT FOR USE WITH CLIENTS.

DMI'S SEMINAR SALES SYSTEM INTEGRATES SEMINARS INTO YOUR PRACTICE

With a tested program, the right marketing support, and appropriate follow through, seminars can be one of the most effective ways of generating new business.

DMI provides turnkey seminars to put you in front of a room full of qualified prospects. Our system includes pre- and post-presentation tools designed to help you set more appointments and close sales efficiently.

Seminars are the one of the top prospecting method for professionals. Our system enables you to:

- Build your brand
- Grow your business with educational content
- Convert more prospects into clients
- Be seen as a trusted financial professional

Seminars are proven to help draw new prospects in front of financial professionals. Work with DMI to position yourself for a successful seminar that can yield results!

ZIP CODES

Selecting zip codes is the first step in the seminar process. First select zip codes in the area where you want to conduct your seminar. Once a target area is selected, DMI will run counts for a 5-10 mile radius.

The total count should be 5,000-10,000. Once the zip codes are verified, DMI will send a spreadsheet to you with a complete breakdown of the demographics.

VENUE & DATES

Picking a location is a key component to the seminar process. A local library or community center is preferred because typically you can secure the space at no charge. However, a hotel will also work, but take into consideration there may be a rental fee. You want to be sure the location has the proper materials to execute your seminar (i.e. projector/screen, audio/visual components). After picking a location, you then select dates for your seminar.

INVITATIONS

We partner with a mailhouse to execute the seminar mailing process for you. Once you have chosen your location and dates, you will then complete the mailhouse order form with payment and send to DMI no later than 45 days prior to seminar. Your reservations will be managed by TeleDirect. TeleDirect is a reservation confirmation company that tracks all reservations for the seminar. TeleDirect will also make confirmation calls 1-2 days prior to the seminar.

TRAINING

Training is an essential part of any seminar program. DMI offers a comprehensive 30 day training process to ensure that you have a full understanding of seminar basics and all the various planning strategies.

PRE-SEMINAR

DMI will reach out to you prior to your seminar to review all materials and to ensure you have everything you need. If you need any additional materials, DMI's Marketing Services Team is able to assist.

SEMINAR

We suggest that you arrive at the venue at least 2 hours prior to your scheduled start time. Ideally, you will have a staff member with you to greet guests, check them in, and make sure they are comfortable. When you first arrive, speak with the venue's on-site coordinator to review your needs for the seminar. This is also the time to set-up and test your Audio/Visual equipment for the presentation.

POST-SEMINAR

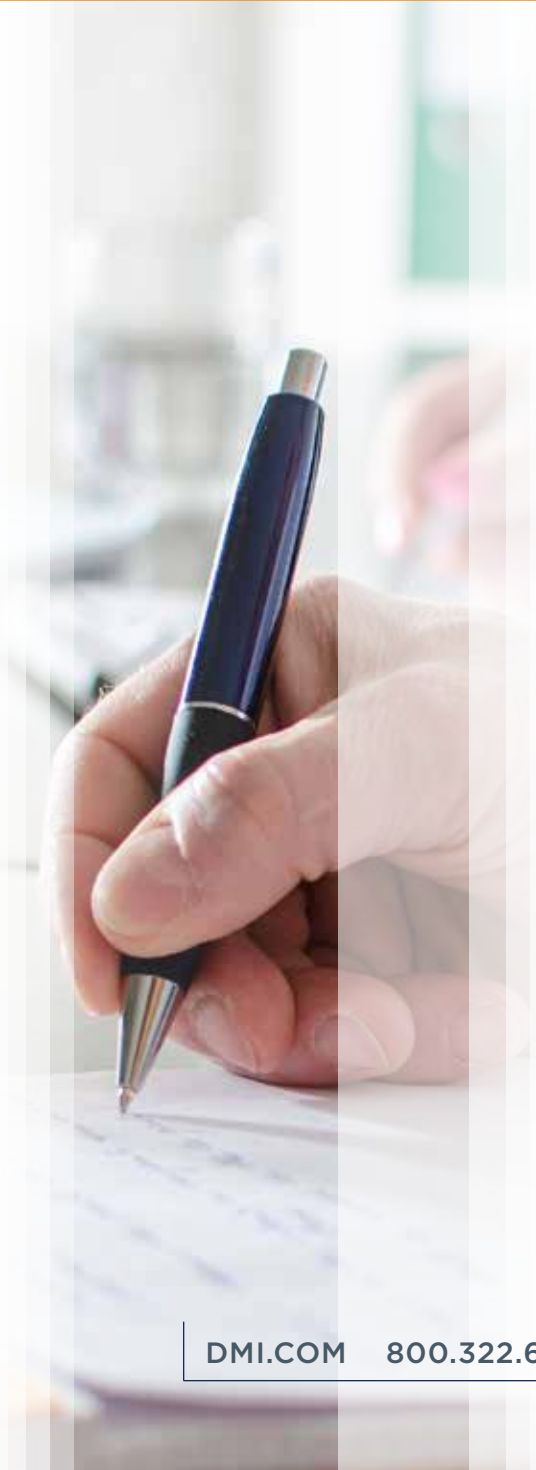
When the presentation has concluded, you and your on-site staff member should collect seminar review forms and set appointments. We suggest that every seminar attendee be called within 24 hours to schedule an appointment. DMI requests that you provide us with the number of people attended, number of no-shows, and number of appointments made on-site.

It is extremely important for you to continue to build relationships with attendees as well as with those who were unable to attend. DMI provides sample letters that you may customize to fit your needs.

We value and welcome all feedback regarding the seminar process. Although we do consider ourselves 'seminar experts', we are always looking for ways to improve the process.

MATERIALS MAY INCLUDE:

- Appointment cards
- Pop-up banners
- Company brochure
- Seminar evaluation forms
- Attendance sheet
- Notebooks/notes pages
- Pens
- Baby boomer guide
- Laptop



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GROW THEIR BUSINESS.**

Contact DMI today to get started.

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DMI

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