WEBINAR AND WORKSHOP
FOLLOW-UP PROCESS AND APPOINTMENT PLAN

1. DECIDE APPOINTMENT LENGTH AND TYPE

For workshops, most advisors/agents are typically offering a 15- or 30-minute complimentary consultation first. In this initial meeting you can go over what their needs are and any questions they have. Think of it more as a fact-finding call and a way to build rapport. For second appointments, that's when most advisors are offering a 60-minute virtual or in person meeting. Will you be running all your appointments via phone, via Zoom or in person?

2. COMPLETE CONFIRMATION CALLS

If your vendor doesn't complete confirmation calls, make sure to complete 1-2 days before your event using the provided script.

3. SEGMENT REGISTRANT LIST INTO SEGMENTS FOR EMAIL FOLLOW UP

Once you have your complete registrant list after the event, break it up into your email list segments. The segments are registered but didn't attend, attended but didn't make an appointment, and attended and made an appointment.

4. SEND OUT FOLLOW UP EMAILS TO ALL REGISTRANTS

We recommend following up with each segment within 24-48 hours after your event. We break out the scripts by each segment below. Feel free to also include any follow up docs with your emails that we have provided.

THREE WORKSHOP/WEBINAR FOLLOW UP EMAIL SCRIPTS

1. REGISTERED BUT DIDN'T ATTEND:

Subject: Sorry We Missed You

Hi [Name],

We missed you at our ["Maximizing Social Security" or "Taxes in Retirement"] Workshop on [date].

If you are still interested in learning about the strategies discussed during the workshop, just click here [insert link to email address or Calendly link] to schedule an appointment with me. I'd be happy to talk with you one-on-one at your convenience!

Hope to speak with you soon!

Sincerely,

[Advisor Name]

[DISCLOSURE/COMPLIANCE REQUIREMENTS]

2. ATTENDED BUT DIDN'T MAKE AN APPOINTMENT:

SUBJECT: A Sincere Thank You

Hi Friend,

On behalf of everybody at [Company Name] we'd like to thank you for attending our workshop. We hope you found it informative and left with some great takeaways.

Since everyone's situation is unique, we'd like to extend you an offer to meet with us [via phone, virtually or in person] for a more detailed one-on-one meeting. At this time, we can answer any questions you may have, discuss your retirement, and work on a strategy to better serve you.

Click here to schedule an appointment [include Calendly link] or call us at [phone number] and schedule your complimentary consultation.

Sincerely,

[Advisor Name]

[DISCLOSURE/COMPLIANCE REQUIREMENTS]

3. ATTENDED AND MADE AN APPOINTMENT:

SUBJECT: Appointment scheduled with [Company Name] Hi [Name],

This is just a friendly reminder that you have an appointment with [Advisor Name] on [date, time].

- [include any meeting information on how you will be conducting your appointments]
- [If possible, for the most accurate results at your first appointment, kindly collect any recent statements for the following:
    - include any documents you'd like them to prepare in bullet points]

If you have any questions, don't hesitate to email me, or give us a call at [phone number]. We look forward to speaking with you on [date, time]!

Sincerely,

[Advisor Name]

[DISCLOSURE/COMPLIANCE REQUIREMENTS]