

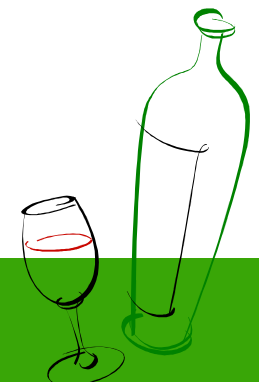
Client Event Brainstorm: 21 Fun Ideas for Connecting With Clients and Prospects This Fall

Presenters:

Sean Bailey, Horseshmouth Editor in Chief



Bryce Sanders, President of Perceptive
Business Solutions



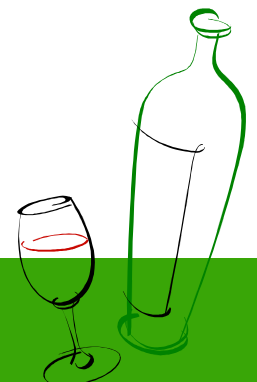
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More Client Events Equals More Success!

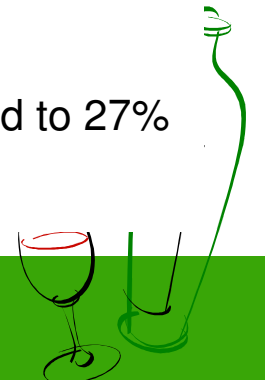
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Survey Data Reveals Critical Differences Among Advisors:

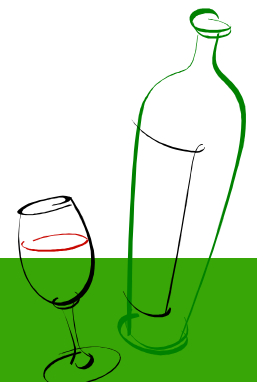
- **46%** of top performing advisors have held more than 20 client events, but only 16% of advisors as a whole have held that many.
- **43%** of top advisors hold client events at least once a quarter. Only 22% of advisors as a whole hold them that frequently.
- **60%** of top advisors are very satisfied with their client event strategy, but only 28% of advisors as a whole feel the same way.
- **69%** of top advisors say, “I do them well; they’re successful” compared to 27% of all advisors surveyed.



What Elite Advisors Say:

“With all the revenue that comes in from our clients, how often do we have a chance to give something back to them?”

“My book is as full as I want now”



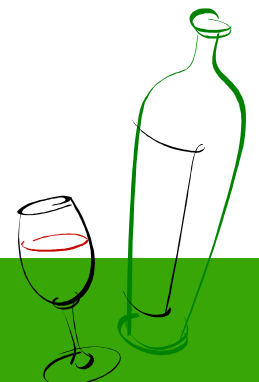
“There’s no better way of generating qualified prospects than spending several hours with a group, them having a great time and establishing that you’re the smartest advisor in the room!”

“I thoroughly enjoy them and I plan on getting better with experience”

“Practice makes perfect.”



“We’ve made client events a core part of sales and service model. Just makes sense.”



“The ideal group is under 10 people... We’re selling a very high level of service so how can one expect to have their prospects/clients get that feeling of being special in a large group? These smaller events are less time-intensive to set up and less costly as well. In a smaller group, one can really get to know each other.”



“My events well received and well attended. Clients are attracted to them because we don’t push products or sales during those events.”

“There’s more opportunity out there but you must plan properly to make it unique”



Demonstrate leadership that
reinforces client loyalty

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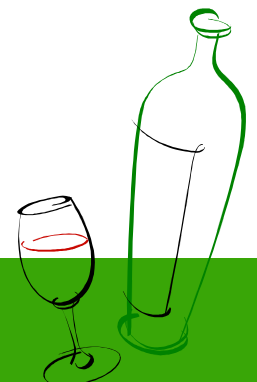
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Creates opportunity to foster
friendships

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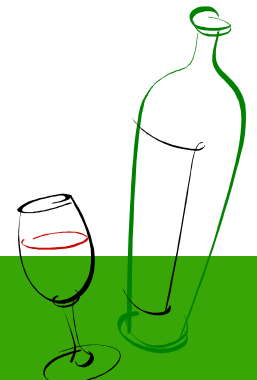
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It's a highly replicable marketing tactic

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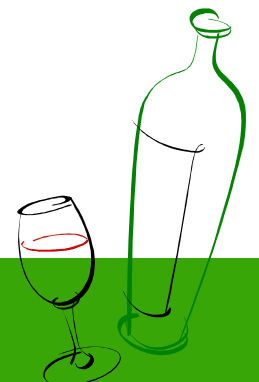
It's a critical success skill that
should be learned, practiced,
polished



Thaws icy client relations

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Provides marketing discipline

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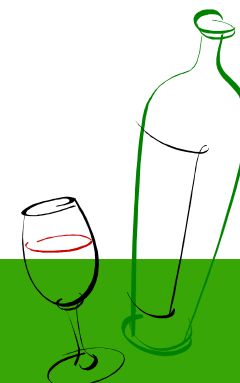
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Host an intimate client dinner



Happy, relaxed
guests

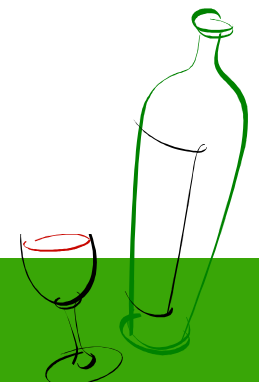


Planning your event

🍷 **Objective / theme**

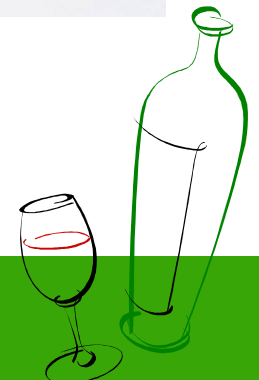
🍷 **Budget**

🍷 **Calendar**



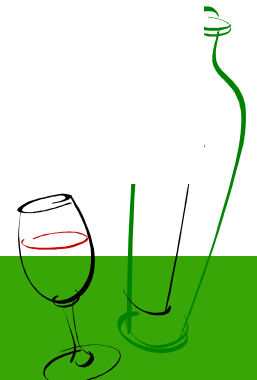
Suggested materials/supplies

- **Name badges**
- **Invitations**
- **Parting gifts for each guest**
 - Compact wine reference book
 - Bottle of wine
 - Box of gourmet chocolates
 - Corkscrew
 - Golf items



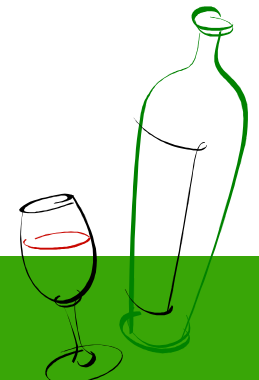
Step one: select a theme


- Wine, Wealth & Wisdom: An evening of fine food and drink for guests of Abundant Financial
- A glass of wine and a friendly conversation about what lies ahead for the economy
- An exclusive evening of food and drink and enlightenment on the market situation for our guests
- Some of Italy's many wealths—her food and her wine...
- An evening discussing International Wines and International opportunities in investing



Step two: reserve a private room

- Private room or club
- Italian or French restaurant
- Meet GM, Owner or Sommelier
- Other Locations: Art gallery (cater the event)





Step three: decide who to invite

Fun, TOP clients

Raving fans

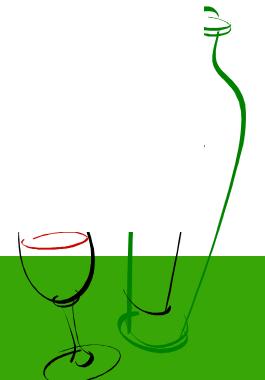
Key prospects

Balance: 50% client – 50% prospect



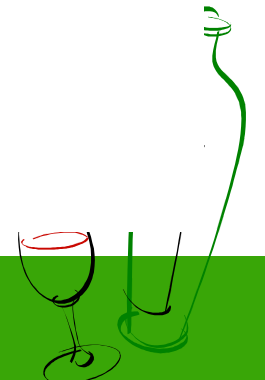
Step four: extend invite

- Hold the date call
- Mention invite to another couple
- Mail invitation
- Call one week later (2 weeks before event)
- Ask how many will attend (get names)
- **One week before:** email and mail directions
- **Day before:** Call each guest
- Reconfirm with event location



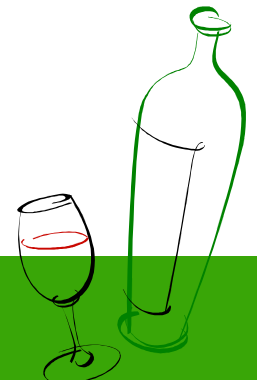
Step five: host event

- Do name tags
- Hand out wine card
- Appetizers, First wine, mingle
- Before Second wine: greetings & housekeeping
- Finish tasting – complete wine card



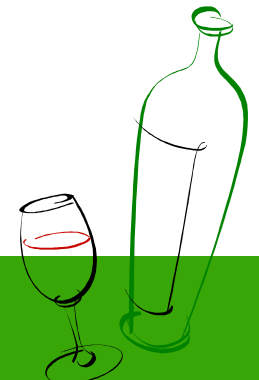
Step six: deliver your value proposition

- After dinner, before dessert
- Deliver market update & key messages
- Keep it short
- Focus on:
 - Who you're working with
 - New challenges, or niche
 - New initiatives
- Thank everyone!



Step seven: follow-up

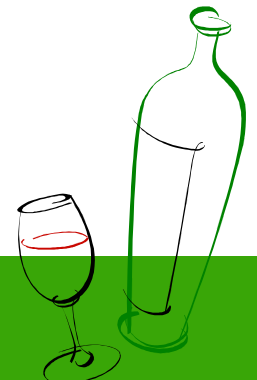
- Handwritten note
- Send gift
- Add new contacts
- Invite new prospects – coffee, lunch
- Drip marketing campaign
- Invite to next event
- Post photos or email



Checklist for great client event

Three weeks prior:

- Determine event theme and date.
- Book location.
- Make a list of clients and prospects to invite.
- Telephone call to “hold the date.”
- Send written invitation



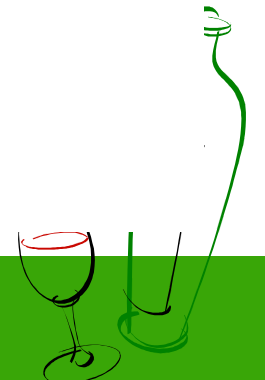
Checklist for great client event

Two weeks prior:

- Place calls to get head count. Tell clients you have saved two extra seats, if they would like to bring some friends or a family member.

One week prior:

- Email or mail directions to the location.
- Start pre-addressing thank-you notes, insert business cards, stamp, etc.



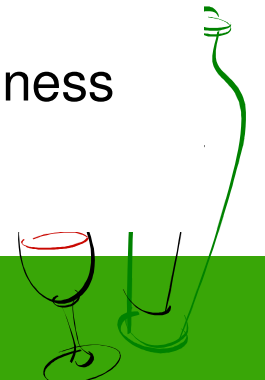
Checklist for great client event

Day before:

- Call them the day before to remind them and give them directions again. Good time to see if they have any friends they want to bring.

At the event:

- “Work” the event.
- Use inconspicuous 3x5 cards to make notes of interesting information about clients or opportunities for follow-up.
- Encourage attendees to complete the brief Retirement Readiness Survey and evaluation form.



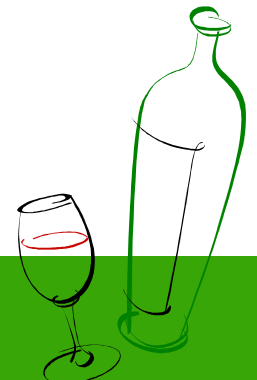
Checklist for great client event

One day after the event:

- Log any gifts given to clients during the event.
- Place follow-up phone calls and mail thank-you notes.

One week after the event:

- Email photos to clients.
- Enter all data into contact management software about new prospects and existing clients.
- Add prospects to your drip marketing campaign.



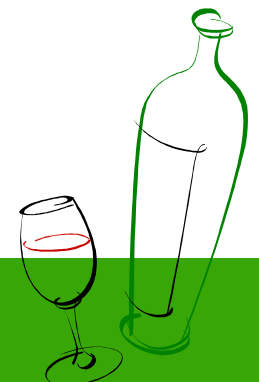
SPCA fundraiser



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Antiques Roadshow appraisal event



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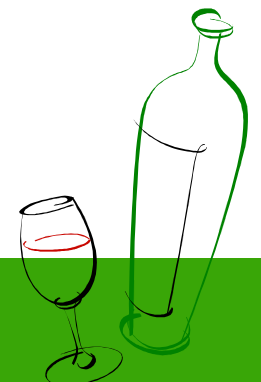
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Visit to a winery

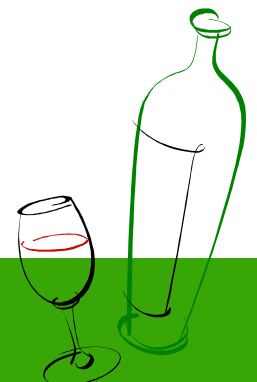


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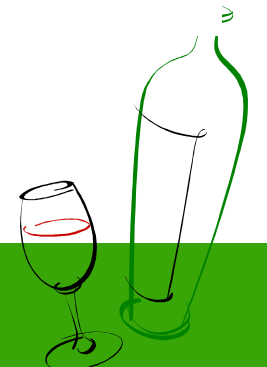
Client Event Brainstorm: 21 Fun Ideas



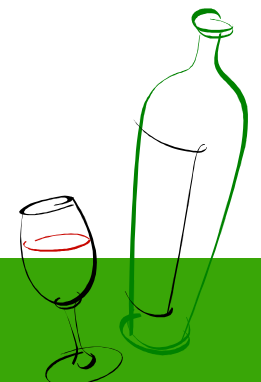
Throw a Constitution Day party



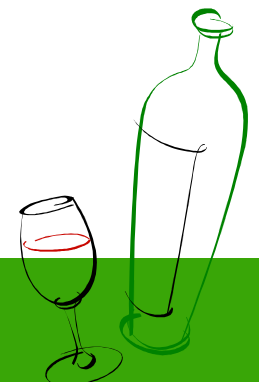
Tailgating party for the football fans



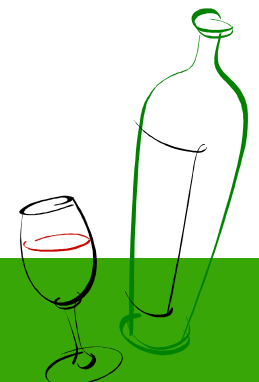
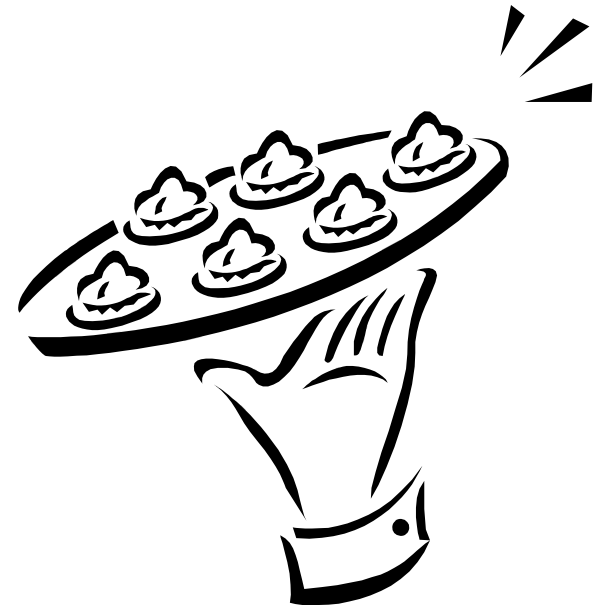
Military tour.
Check out a
submarine or a
battleship.



A Victorian dinner



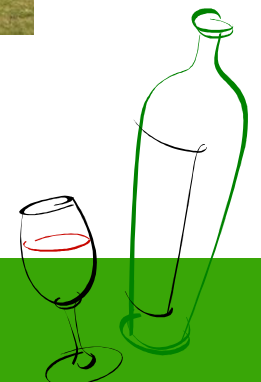
A food and wine tasting comparison party



Wine tasting and tapas



Polo



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Golf



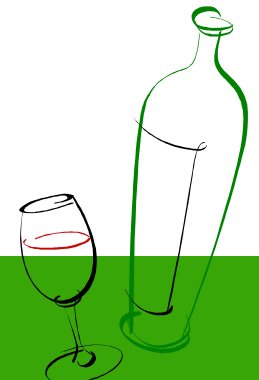
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Halloween party



Black tie cocktail reception



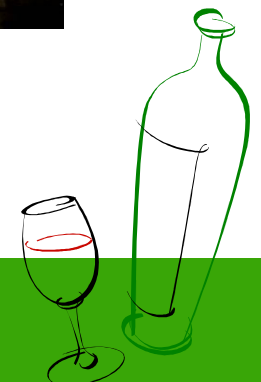
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Client Event Brainstorm: 21 Fun Ideas

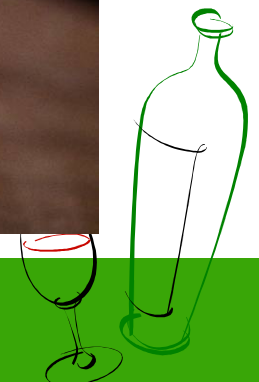
New exhibition and private reception at your local museum



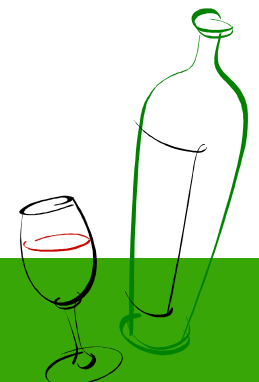
Client Event Brainstorm: 21 Fun Ideas



Rent the historical society mansion for a private cocktail party



Host a Santa event

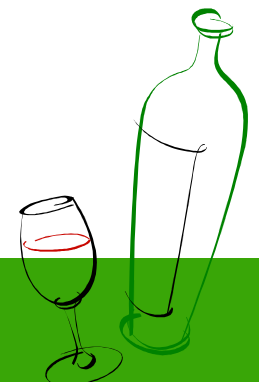


Organize a charity auction



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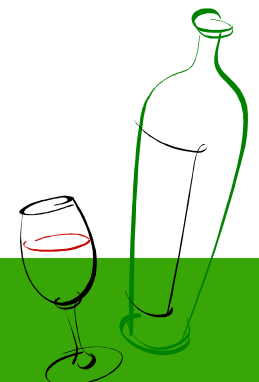
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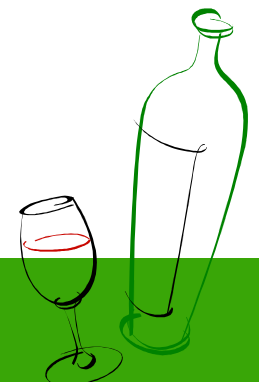
Pumpkin
picking, corn
maze,
hayrides



Christmas tree lighting and tour of homes



Throw a
Christmas or
holiday party



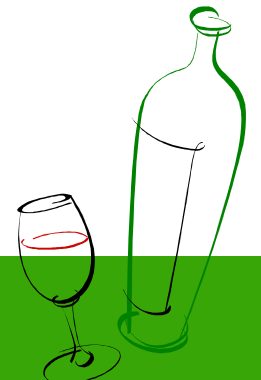
Visit a local auction house with an upscale sale during the preview period



10 Reasons Client Event Mastery Give you Prospecting Autonomy

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#1 Events Build a Foundation for Future Referrals

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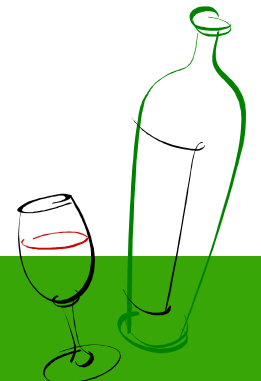
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#2 A Good Event Is A Personalized Advertisement Into Your Clients' Networks

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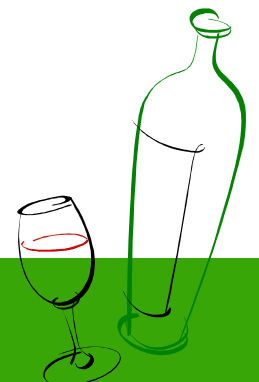
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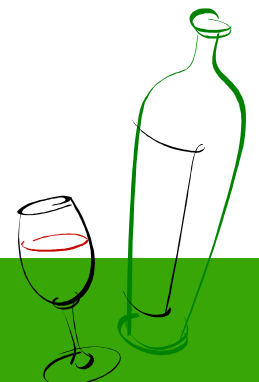
#3 It's a "Must-Have" Niche Skill

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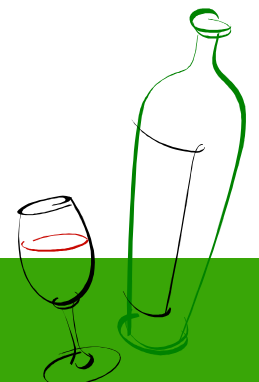
#4 It's a Critical Skill, Too



#5 There's a Clear ROI You Can Measure

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#6 It's Essential To Re-investing In Your Brand

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#7 Good Client Events Don't Have to Cost a Lot

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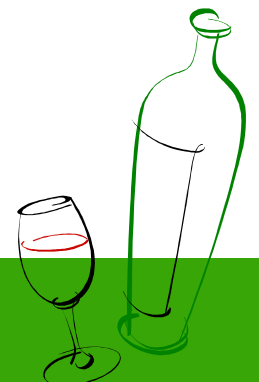
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#8 Events Can Be Easy, Fun and Low Key

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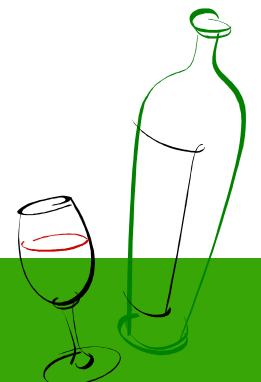
#9 You Don't Need a “Good Idea” to Hold a Good Client Event



#10 Events Highlight Your Leadership

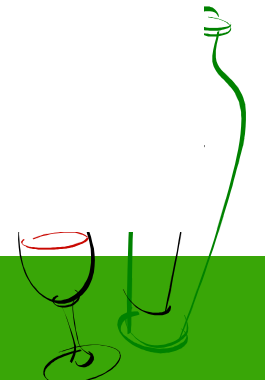
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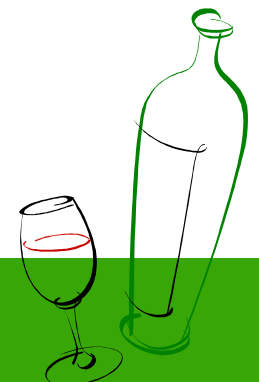
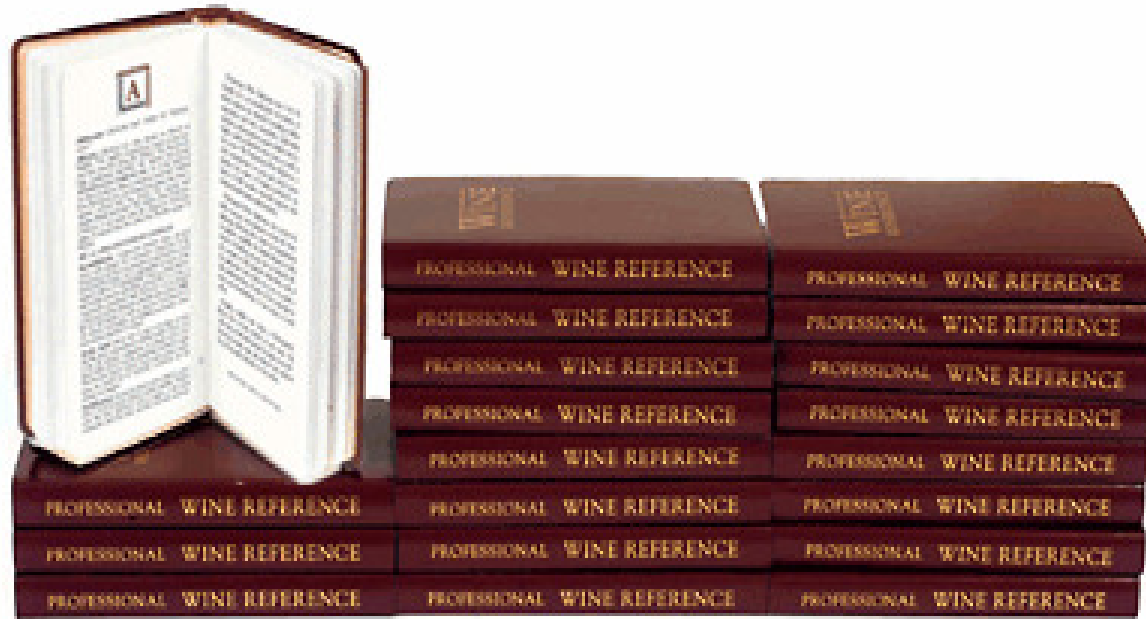


Summation

- Learn to do client events well—critical success skill
- Enjoy doing them—fun part of your job
- Do 12 over the next year and watch your business grow.

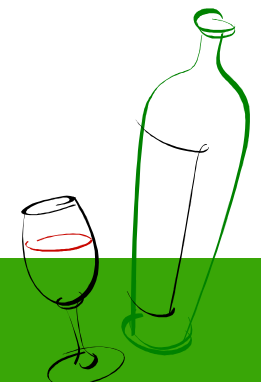


Advisor gift pack: Professional wine reference books



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Secrets of Successful Client Events



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Questions??

Email:
clientevents@horsesmouth.com

Sean Bailey,
Horsesmouth Editor in Chief



Bryce Sanders,
President of Perceptive
Business Solutions



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