



A SEMINAR CHECKLIST

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Education-based marketing is still a very effective method to build your practice. I say still, because some have come to regard it as yesterday's marketing strategy. But it is just as effective today as ten years ago. It can put you in touch with a focused group of potential clients, provide a valuable service to existing clients, and present you to both groups as a highly qualified practitioner in the subject area. That is, of course, if you are a good presenter and put on a quality event.

Even if you put together a first-rate seminar, your expectations should be realistic. The investment of time to present a quality event should always be viewed as a long-term investment. That is, you should not expect to walk away from your seminar with a new client. Realistically, you are attempting to position yourself as the "expert" who seminar attendees will *eventually* turn to, or recommend others to, when the need arises.

This type of positioning — the building of "credentials" —requires more than one seminar, and employing other reinforcing strategies including publishing articles, writing newsletters, chairing appropriate bar sections, or other such demonstrations of your knowledge and abilities in a focused area. The result of these education-based activities is a *cumulative* effect which ultimately "brands" you as *the* person to call about particular matters. These are "credentials" which eventually produce business, and generally keep on producing.

The ultimate test of a good seminar is not whether the presenter feels good about it. That post-presentation adrenalin rush can be deceiving. It is more about who and how many prospects actually attended, how interested they were, how much participation they exhibited, and whether it created a memorable impression of you as an authority on the subject matter.

As the saying goes, the devil is in the details. A seminar should be planned down to the smallest detail, so that everything goes seamlessly. You want your prospects focused on the presentation, not on a flurry of activity connected to the seminar. Except for your actual presentation, everything should be low key and effortless. The brief checklist which follows will enable you to ensure nothing significant gets missed in the planning process.

Site Selection

- Q **Location** — What is the best venue? Determine the atmosphere do you want. How big a room you need will be determined by how many people must be accommodated, and what type of set-up you want. Choices include hotel, conference center, internal conference room, or rented conference room at a business suite.
- Q **Set-up** — The physical layout of the room is important. It must take into consideration comfort and easy access for attendees. If arranged properly it will extend your influence in the room and eliminate distractions. *Theater* style or *Classroom* style (with tables) is appropriate for larger groups where you want to hold center stage as the “giver of wisdom”. If notes are to be taken, or reference material will be referred to, Classroom style is better because it provides a writing surface. To promote interaction with the audience, switch to *Chevron* style, (seating rows angled on both sides of the room toward center stage), which can be used with or without tables, as your needs dictate. For smaller groups of up to 15 people, *Boardroom* style (around a conference table) works very well. It provides the appropriate feeling of formality and leadership, yet facilitates interaction. To encourage a greater degree of participation consider a *U-Shape* set-up with a speaker’s table at the open end of the U.
- Q **Seating** — Provide comfortable chairs. If you use your conference room, don’t assume your chairs are comfortable for women. My experience is that many of the conference room chairs I encounter are so large and deep that most women can’t sit comfortably in them. If your seminar will be longer than a couple of hours, make sure the chairs are adjustable.
- Q **Environment** — No matter what the temperature, someone will be too hot, and someone too cold. Resist the impulse to change the thermostat when an individual complains as long as the temperature is between 70 – 74°. Do plan to ensure adequate air circulation, even if the door is closed. Even a slightly warm room seems comfortable if there is good air flow. Avoid strong odors — good or bad. You don’t want the distraction. Keep shades drawn if the sun is shining directly in. Make sure lighting is adequate. Whenever possible, arrange the room so that people enter and exit from the rear of the room, so that late arrivals or early departures are not distracting to others.
- Q **Catering** — Will you be serving food? Breakfast, lunch, dinner, snacks, break refreshments, and cocktail reception are all possibilities. Make sure there is adequate table room for beverages, and plates if necessary. Keep food preparation far away from the seminar room so noise and odor is not an issue. Make sure there are adequate receptacles set up to handle refuse, and that it is quietly and quickly cleaned up if there is a break in the seminar. Always plan on providing ice water and coffee at a minimum.



- Q **Equipment** — Make sure of the acoustics at the site so that people can hear you easily and clearly. Microphone type is a consideration. If you want to move around, use a lavalier. You may need a podium for notes or speaker platform so everyone can see you clearly. Locate screens, projectors and any visual equipment so that everyone can see exhibits easily. Don't forget flip charts, white boards, markers, erasers, and laser pointers. Test all equipment for working order well in advance. Have spare projector bulbs, extension cords, tape and so forth ready just in case.
- Q **Registration** — You will need a table outside the door for name tags and seminar materials. You want to know who attends and who fails to show up, so you can follow up differently with each. (Nothing looks more foolish than a follow-up "thanks for attending" letter to a no-show.) You also want to capture information and provide a badge for any walk-ins. For that reason, it's a good idea to have a staff person at the table. Be sure the table has a vanity curtain so you can hide personal items like pocketbooks, spare markers, spare badges, and so forth.
- Q **Signage** — A sign should be provided at the outside entrance, enroute to the room, on the registration table, and if necessary for rest rooms and coat storage if they are not in immediate proximity and clearly visible.
- Q **Photographer** — You may need photos for internal use, for press releases, or for clients. The intended use will determine whether a professional photographer is needed.
- Q **Flowers** — Some people feel flowers are only needed for formal events. But even informal events can be enhanced by a small tasteful arrangement on the registration table.

Communications

- Q **Invitations** — Formal brochures should be consistent with the firm's other graphic pieces. Letter invitations should be no more than one page long, and essential information such as date, location and time should be bolded to easily stand out.
- Q **Mailing List** — Possible sources include client lists, contact or referral lists, prospect lists, chamber of commerce lists, industry/trade associations, reference directories such as Dun & Bradstreet, local business publications, and the internet.
- Q **Reminders** — People sometimes forget to check their calendars, or forget to put appointments on the calendar at all. To ensure good attendance it's a good idea to call and reconfirm attendance a day or two before the event.
- Q **Seminar materials** — Include everything in an attractive cover, and keep the appearance consistent with the firm's other graphic pieces. Include an agenda, tabs for individual presentations, copies of all visual presentations, and a biography for each speaker. Additional supporting materials can include firm-related materials including newsletters, client advisories, article reprints and so forth. Be sure to include a business card attached to the inside of the cover. Consider including a 5x7 memo pad with the firm name embossed, and a pen.



- Q Evaluation form** — Feedback is important. Create a form which asks about substance value, presentation format, suitability of facilities, and quality of presenter. Solicit information on topics of future interest, and desire to receive newsletters or remain on your mailing list for future events. Provide a fax number for the evaluation form to be sent, so that those uncomfortable providing candid feedback on the spot can do so later. Include an area on the evaluation form for an optional name and phone number, and ask whether any personal follow-up is desired.
- Q Introductions and closings** — Someone should introduce the speaker. As part of the “housekeeping” include a statement of the purpose of the seminar, detail procedures for question and answer handling, note the evaluation form, advise of breaks, location of telephones and rest rooms, and when the seminar will conclude. Following the presentation someone should thank everyone for attending, ask again for evaluation forms, direct attendees to follow-up events if appropriate, and encourage everyone to remain and ask additional questions if they desire. Try to personally thank as many people for attending as possible.
- Q Public relations** — You may want to do a press release before and/or after the event. You may want to invite the media to attend. You may want to offer to write an advisory summary for the media following the event. You should immediately, while memory is fresh, make a note of who asked what questions, and any other personal information about any attendee you obtained in the course of the seminar (see follow-up below).
- Q Videotape** — Do you want to preserve the seminar for internal firm use, client and/or prospect use, or follow-up? Generally, without professional assistance, the tape will not be of sufficient quality for use other than internal. But watching your performance on tape after the fact can be a wonderful tool to improve future presentation skills. Make sure that any taping activity is not distracting to the audience.

Follow-up

- Q Attendees** — A personal call is always better than a letter, if time permits. At a minimum a thank you letter should be sent immediately following the event. Personalize each letter by adding a comment or two about a question asked by the person at the seminar, or some other personal fact you gleaned. It will indicate that you clearly remember the person. Be sure to add those who've asked to future mailing lists, and likewise drop those who've requested they be deleted. Keep in frequent contact thereafter via newsletters and client advisories. Mail relevant article reprints at every opportunity with a personal note attached.
- Q No-shows** — Anyone who rsvp'd but did not show should receive a follow-up call or letter offering to send summary materials, and expressing regret for their absence. Don't send all materials, as often they will not make sense in the absence of the speaker's elaboration. Have an abbreviated clear summary of key points prepared for your no-shows so you can mail it promptly following the event.



- Q Article generation** — Once you've done a presentation, it's very easy to turn it into an article for a client newsletter, for the media, for a trade journal, or a bar publication. Explore the opportunities to use your materials further. Then reprint them and use a reprint mailing as an opportunity to "touch" your client or prospect again.
- Q Repeat seminars** — Once you've done a presentation, it's easy to repeat it for a different trade association, in a different city, or privately for preferred clients. Offer to do a more in-depth seminar on more advanced issues for important prospects and/or clients.

With proper forethought and planning, your seminar event will provide a valuable building block toward future client relationships. And as with so many other things you do, follow-up will be essential to your ultimate success. So when you do your planning, don't forget to include the time it will take to follow up properly. The seminar may be over when the projector light is turned off and your guests walk out the door, but the "event" hasn't ended until your follow-up is complete.

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