



SEMINAR *Follow-Up* GUIDE

ESTATE PLANNING

Looking for assistance when it comes to
sending engaging emails to your leads?

We've got you covered.

creative¹ne

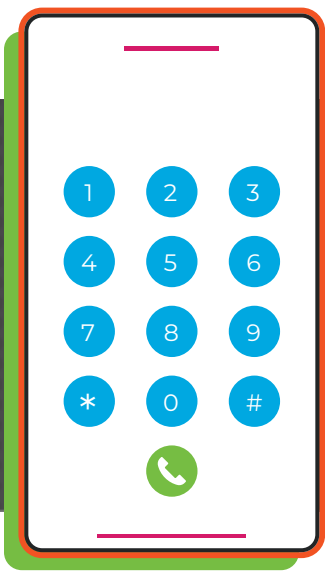
INSURANCE • SECURITIES • WEALTH



YOU JUST HAD A SUCCESSFUL SEMINAR. *Now what?*

WHILE SEMINARS ARE AN INCREDIBLE TOOL FOR BOTH EDUCATION AND NETWORKING, THE MAGIC OF EVENTS TEND TO HAPPEN AFTER THE SEMINAR... WHICH MEANS YOUR FOLLOW-UP STRATEGY SHOULD BE A KEY AREA OF FOCUS.

The secret sauce to a successful seminar is the email sequence that follows. Not only are you able to connect with those who attended, but you can also offer additional resources to re-engage those who didn't attend. And, of course, you can use it to nudge folks into taking action on the follow-up consultation offer you talked about in the session.



A FEW THINGS TO REMEMBER: ***PROMPT FOLLOW-UP CALLS ARE CRUCIAL.***

Try conducting follow-ups the morning after your event, and over the course of the next few days. If they don't answer, leave a voicemail thanking them for their attendance and notifying them that you would like to set up an appointment to answer any questions they may have. Re-emphasize the offer and value they will receive by setting a consultation.

If you mentioned a resource, like a guide or analysis, make sure you send it out promptly. For virtual events and webinars, you need to make sure your webinar recording is accessible.

- Your CreativeOne team will provide you with a shareable link to your published recording that you can share with both attendees and no-shows alike.
- If you have a resources tab on your website (and CreativeOne manages your page,) we can embed the recording on your website to drive increased traffic and help turn your website into a library of knowledge.

Don't forget about the no-shows. What about those that were confirmed to attend, but didn't show? Maybe they had a last-minute emergency, were busy, or simply forgot. You put so much time and effort into planning this workshop—don't leave non-attendees hanging. They initially signed up for your event for a reason, right? So go the extra mile and reach out to them too. Doing so could create solid opportunities for setting one-on-one appointments that could later translate into solid prospects and/ or immediate business!

Offer an in-person or virtual appointment. Continue your line of communication to non-attendees by offering a one-on-one appointment, lined up to their comfort level. Lead with a "We missed you at the workshop ..." message, then provide immediate value by stating you are happy to cover any pertinent information they may have missed from the workshop and to answer any questions they may have.

Remember, persistence is key. If you tried calling or emailing, or both, don't give up after a few attempts. Call seven to eight times at a minimum. Try different days of the week and at **different times to catch them.**

Invite them to a future event. Do you have an upcoming workshop or seminar on the calendar? Extend an exclusive invite to a future event. Let them know it's approaching and that you wanted to extend the invite before it fills up.

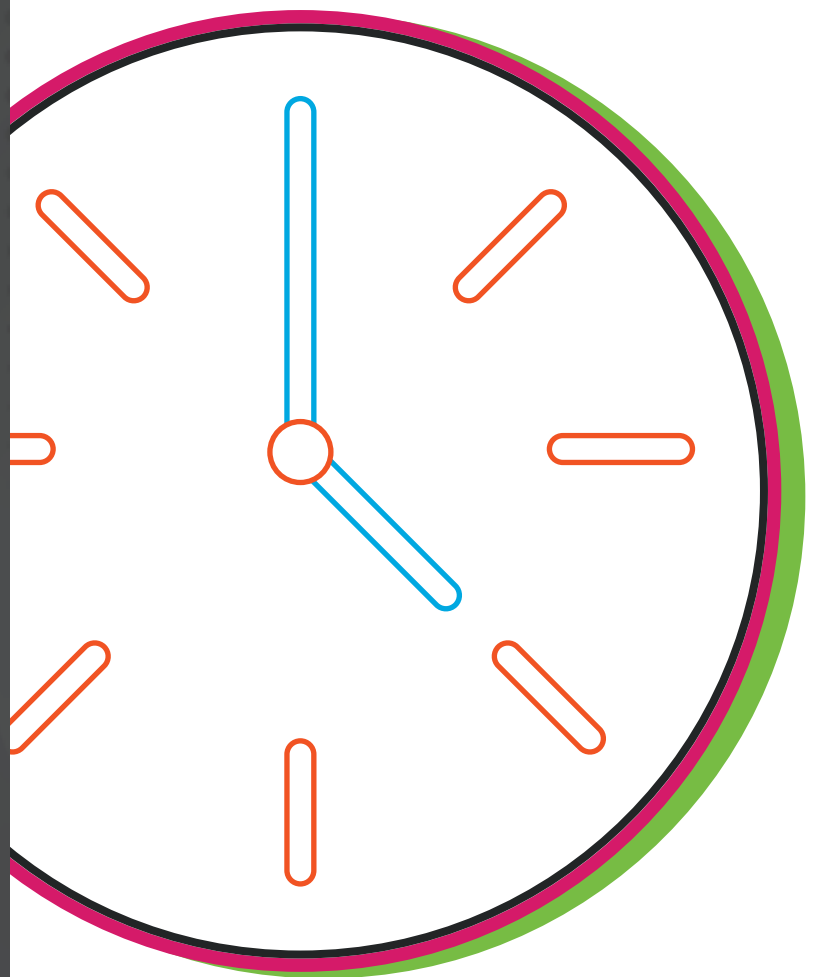
FOLLOW-UP TIMING

We've found that communication lasting five to seven days is the sweet spot. In general, it should start the same day or day after the webinar to ensure the content is still top of mind. For those who registered but didn't attend, you can use this same timeframe.

Looking for assistance when it comes to sending engaging emails to your leads?

WE'VE GOT YOU COVERED.

Continue reading to find our templated email responses that you can use for all your registrants; whether they already booked a spot on your calendar, attended but didn't schedule an appointment, or never showed. Let's get that calendar filled up with new business opportunities!



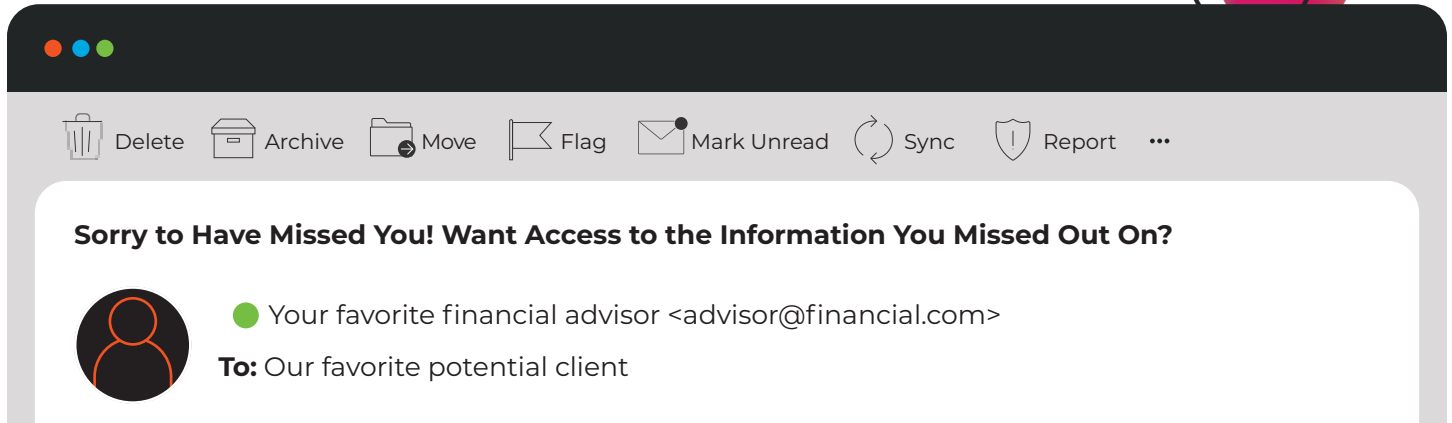
IN-PERSON SEMINAR
FOLLOW UP





SEMINAR FOLLOW-UP GUIDE - ESTATE PLANNING

IN-PERSON NO-SHOWS EMAIL 1



Hi, [name],

Sorry I missed you at the recent workshop held at [venue]. I understand life happens, but I don't want you to lose out on this valuable information either! Respond to this email to let me know if you'd be interested in attending a future event in your area. I'll make sure to invite you once the details are finalized!

Alternatively, my team is accepting a limited number of one-on-one strategy sessions, either virtually or in person, for anyone who was unable to attend.

This is a great way to hear a recap of what you missed and get feedback on the top concerns you might have when it comes to legacy and estate planning. That includes [the pros and cons of wills and trusts, how probate works and how to preserve your assets].

Click here [link to calendar] to request your complimentary strategy session. You'll walk away feeling better prepared with the confidence knowing you are taking the necessary steps toward preserving your estate!

You can also reach out directly at [phone] or [email].

Here's to a successful retirement!

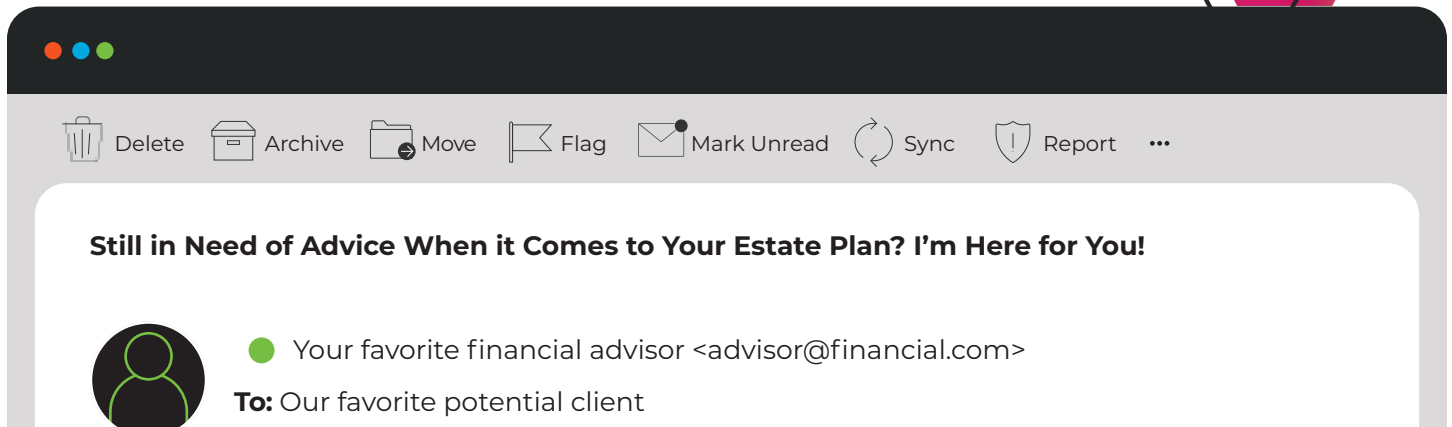
Name

Phone #, Email



SEMINAR FOLLOW-UP GUIDE - ESTATE PLANNING

IN-PERSON NO-SHOWS EMAIL 2



Hi, [name],

Since you couldn't make it to the recent Estate Planning workshop, I wanted to check back in to make sure you didn't have any pressing questions or concerns that I could help address?

I'd love for you to join me at my next upcoming event near you, so respond to this email if you have an interest in attending! Alternatively, if you'd like to meet in a more personal setting then you can schedule a complimentary, one-on-one consultation on my calendar [link to calendar].

I'm here for you, so please don't hesitate to use me as a resource on your journey toward a successful retirement!

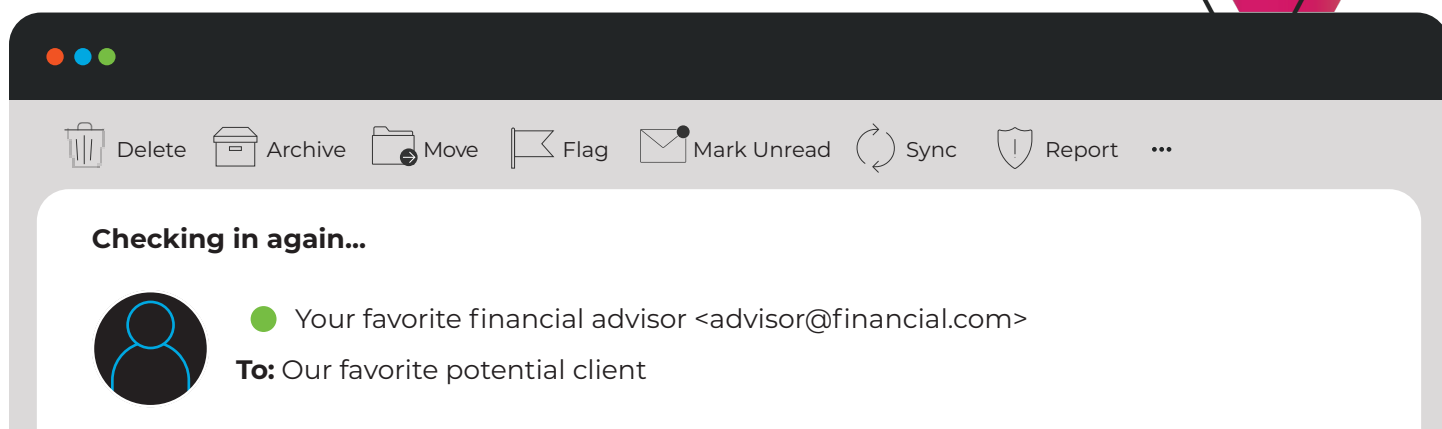
Talk to you soon.

Name

Phone #, Email

SEMINAR FOLLOW-UP GUIDE - ESTATE PLANNING

IN-PERSON NO-SHOWS EMAIL 3



Hi, [name],

Since you weren't able to attend the Estate Planning workshop last week, I wanted you to send you a personal invite for my next seminar, [title], taking place on [date/time]. This time, we'll be discussing [seminar synopsis].

Let me know if you'd like to join us and I'll save you a spot!

Looking forward to hearing from you.

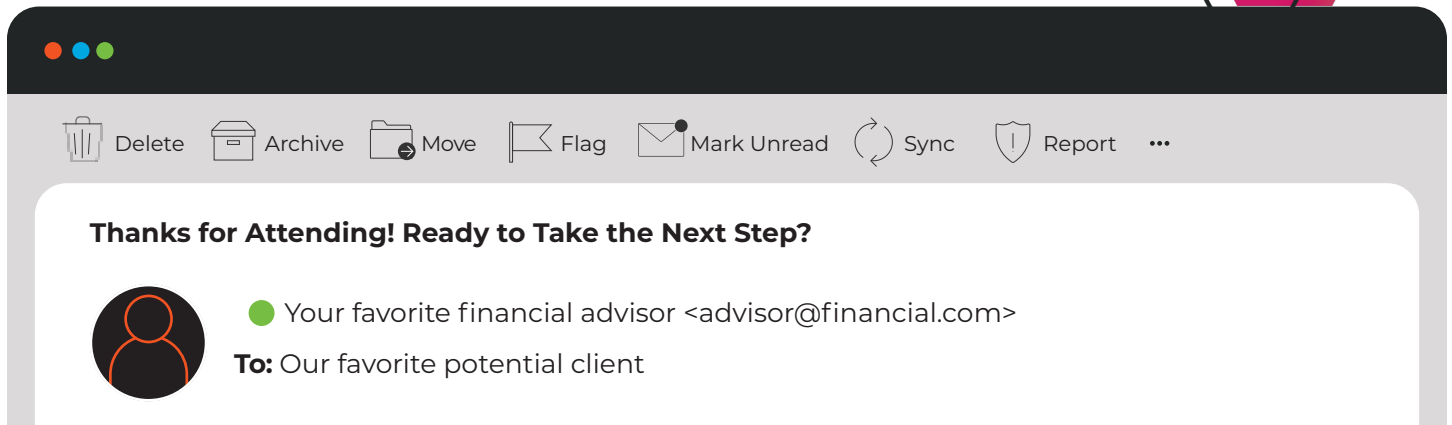
Name

Phone #, Email



SEMINAR FOLLOW-UP GUIDE - ESTATE PLANNING

ATTENDED, NO APPOINTMENT EMAIL 1



Hi, [name],

Thank you for attending my recent workshop held at [venue]. Hopefully you gained some valuable insights, learned new strategies and walked away feeling more informed about estate planning and asset preservation!

I'm accepting a limited number of one-on-one strategy sessions, either virtually or in person, for anyone who attended. If you did not schedule your strategy session at the event, make sure to reach out or click on the link below to schedule while I still have spots available—and the information is top of mind with you.

This is a great opportunity to get direct feedback from me on your top concerns, your current plan and any potential gaps you may have in your estate plan. It's never too early or too late to make sure you have a reliable strategy in place.

Click here [link to calendar] to request your complimentary strategy session. You'll walk away feeling better prepared with the confidence knowing you are taking the necessary steps toward preserving your estate!

You can also reach out directly at [phone] or [email].

Here's to a successful retirement!

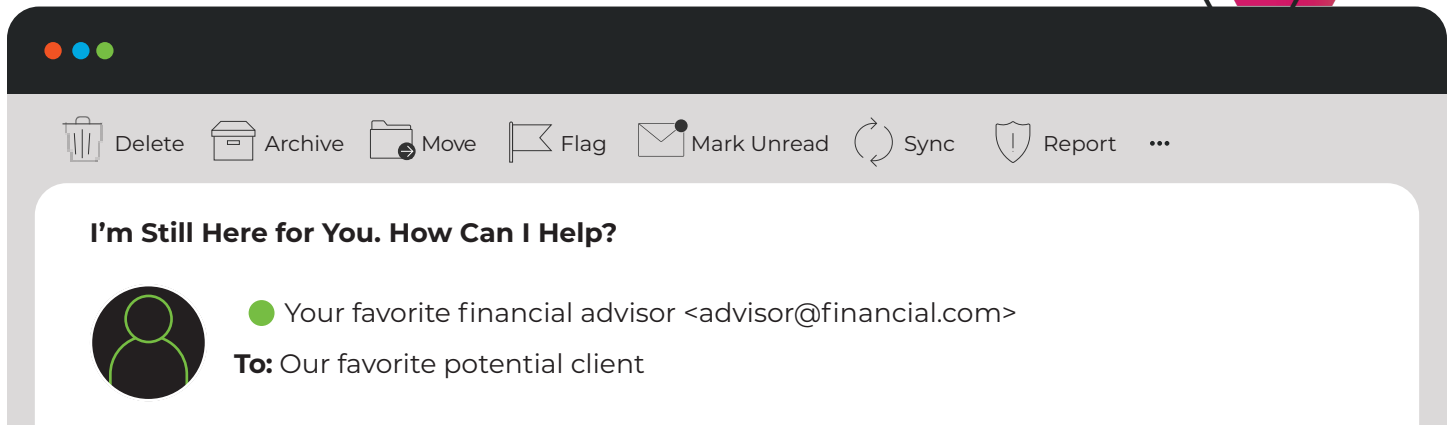
Name

Phone #, Email



SEMINAR FOLLOW-UP GUIDE - ESTATE PLANNING

ATTENDED, NO APPOINTMENT EMAIL 2



Hi, [name],

I wanted to express my gratitude to you for taking the time to join me at my recent workshop. The attendee feedback was overwhelmingly positive, so thanks for playing a role in making it a welcoming and engaging atmosphere.

My calendar is filling up with people scheduling their follow-up consultation, but I still have some openings if you want to take advantage of this complimentary opportunity. This is your chance to ask any lingering questions in a one-on-one setting. We can also discuss how the topics covered in the workshop apply to your unique situation!

Click here [link to calendar] to book a spot on my calendar, or contact me at [phone] or [email] to discuss next steps.

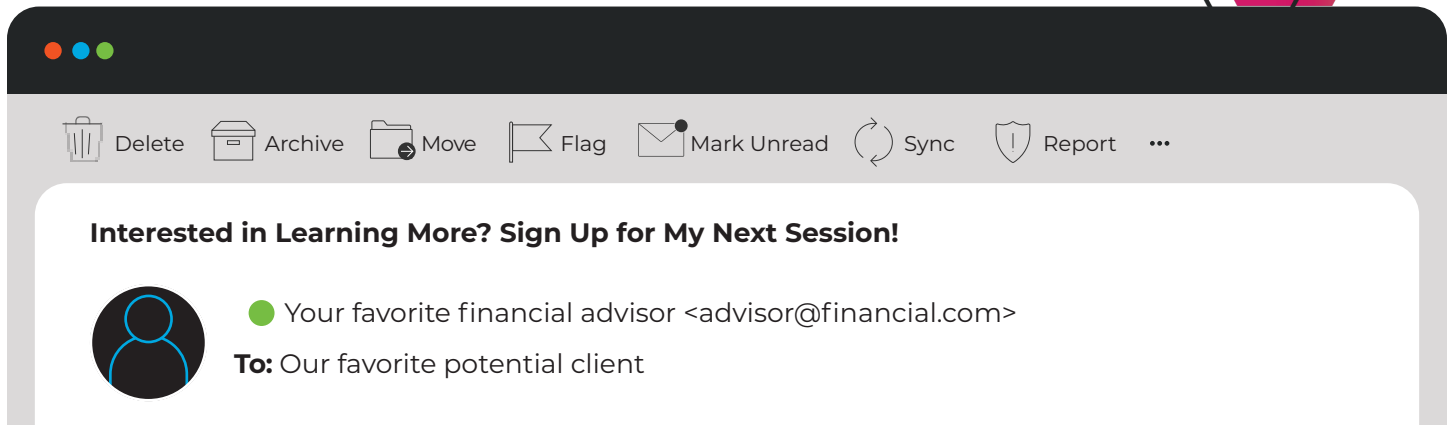
Until next time!

Name

Phone #, Email

SEMINAR FOLLOW-UP GUIDE - ESTATE PLANNING

ATTENDED, NO APPOINTMENT EMAIL 3



Hi, [name],

I wanted you to send you a personal invite for my next seminar, [title], taking place on [date/ time]. This time, we'll be discussing [seminar synopsis]. It'll be a great time to refresh on what we covered at the last workshop and get additional guidance, address any concerns, and walk away with tangible resources you can apply to your holistic retirement plan.

Let me know if you'd like to join us and I'll save you a spot!

Additionally, you're always welcome to give me a call or schedule an appointment [link to calendar] if you'd like to discuss these topics in a more intimate setting.

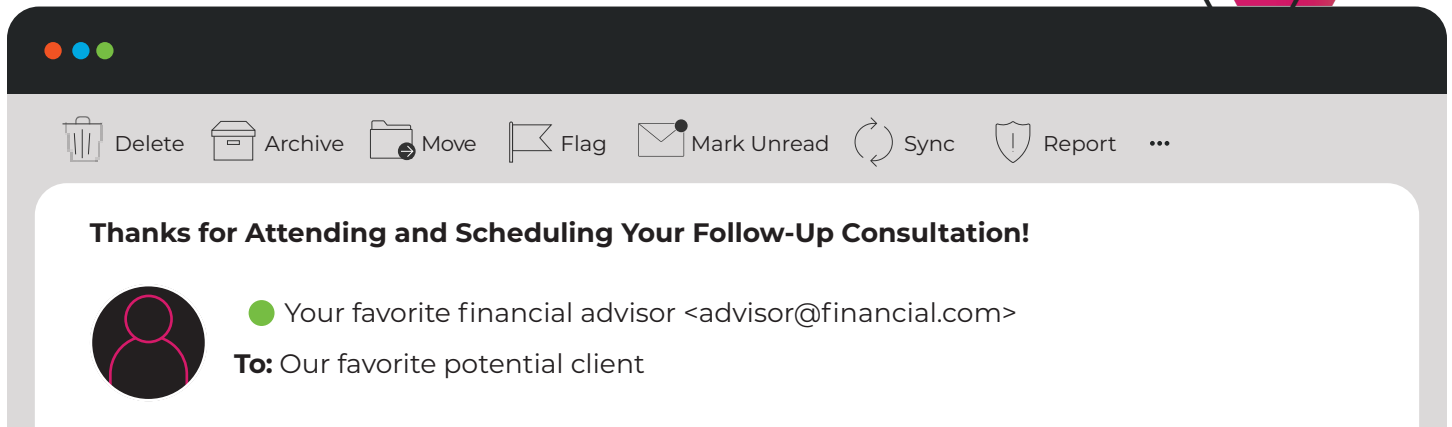
Looking forward to hearing from you.

Name

Phone #, Email

SEMINAR FOLLOW-UP GUIDE - ESTATE PLANNING

ATTENDED, SET APPOINTMENT



Hi, [name],

I wanted to thank you again for attending my recent workshop held at [venue]. Hopefully you gained some valuable insights, learned new strategies and walked away feeling better prepared when it comes to estate planning and asset preservation!

I'm looking forward to speaking with you in a more personal setting at our upcoming one-on-one strategy session. If your schedule has changed or if you have any questions or concerns to address prior to our appointment, please don't hesitate to contact me at [phone] or [email].

Thanks again! Can't wait to chat with you soon.

Name

Phone #, Email

WEBINAR OR
VIRTUAL SEMINAR
FOLLOW UP





WEBINARS OR VIRTUAL *SEMINARS*

While seminars are an incredible tool for both education and networking, the magic of virtual events tends to happen after the seminar... which means your follow-up strategy should be a key area of focus.

The secret sauce to a successful seminar is the email sequence that follows. Not only are you able to connect with those who attended, but you can also offer the recording to re-engage those who registered but didn't attend. And, of course, you can use it to nudge folks into taking action on the complimentary strategy session offer you talked about in the webinar.

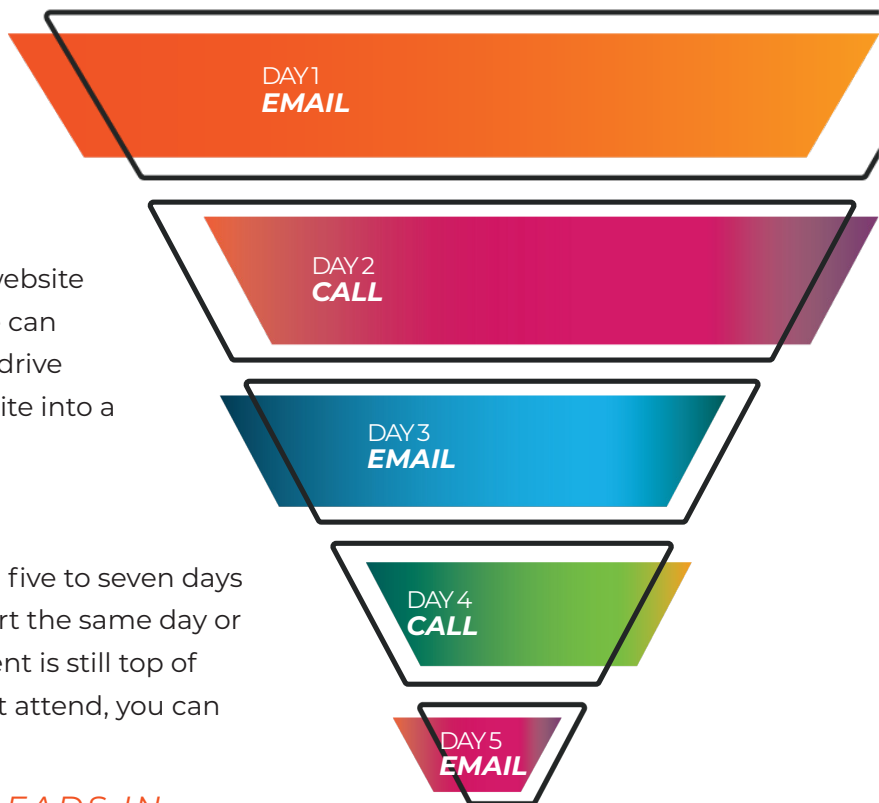
Before you start firing off those emails, you need to make sure your webinar recording is accessible.

- Your CreativeOne team will provide you with a shareable link to your published recording that you can share with attendees and no-shows alike.
- If you have a resources tab on your website and CreativeOne manages your page, we can embed the recording on your website to drive increased traffic and help turn your website into a library of knowledge.

Follow-Up Timing

We've found that communicating lasting five to seven days is the sweet spot. In general, it should start the same day or day after the webinar to ensure the content is still top of mind. For those who registered but didn't attend, you can use this same timeframe.

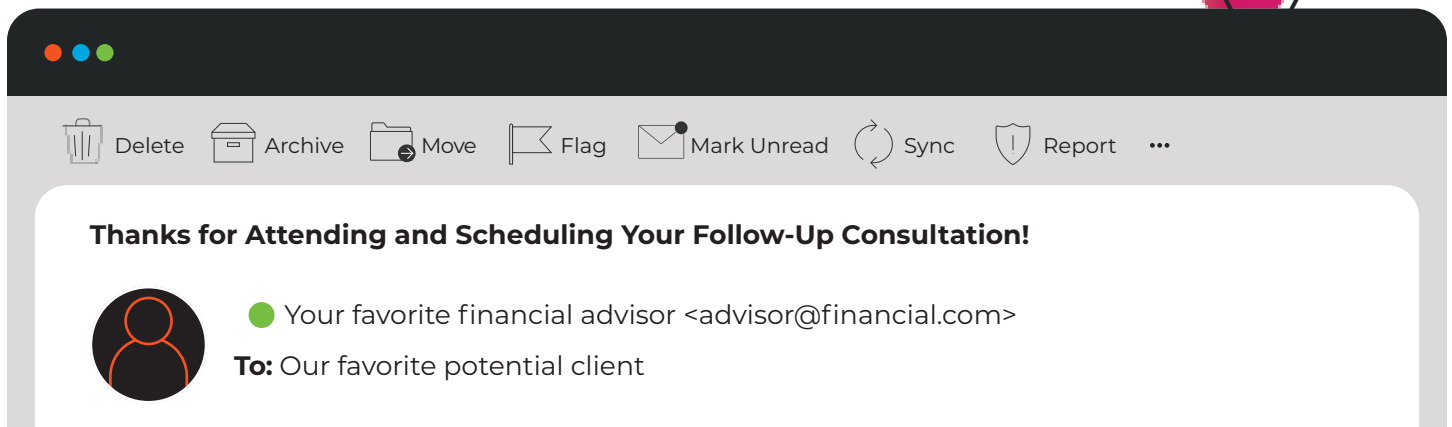
MAKE SURE TO CALL YOUR LEADS IN BETWEEN EACH EMAIL!





VIRTUAL SEMINAR ESTATE PLANNING

DAY 1: EMAIL (ATTENDED, APPT SET)



Hello, [name],

Thanks so much for attending yesterday's webinar event! I sincerely hope you found the webinar helpful and that you were able to learn something new about [estate planning and asset preservation].

Here is a link to the webinar recording [link to recording] and all bonus resources [link to resources] I promised to send.

I'm looking forward to speaking with you in a more personal setting at our upcoming one-on-one strategy session. If your schedule has changed or if you have any questions or concerns to address prior to our appointment, please don't hesitate to contact me at [phone] or [email].

Talk to you soon!

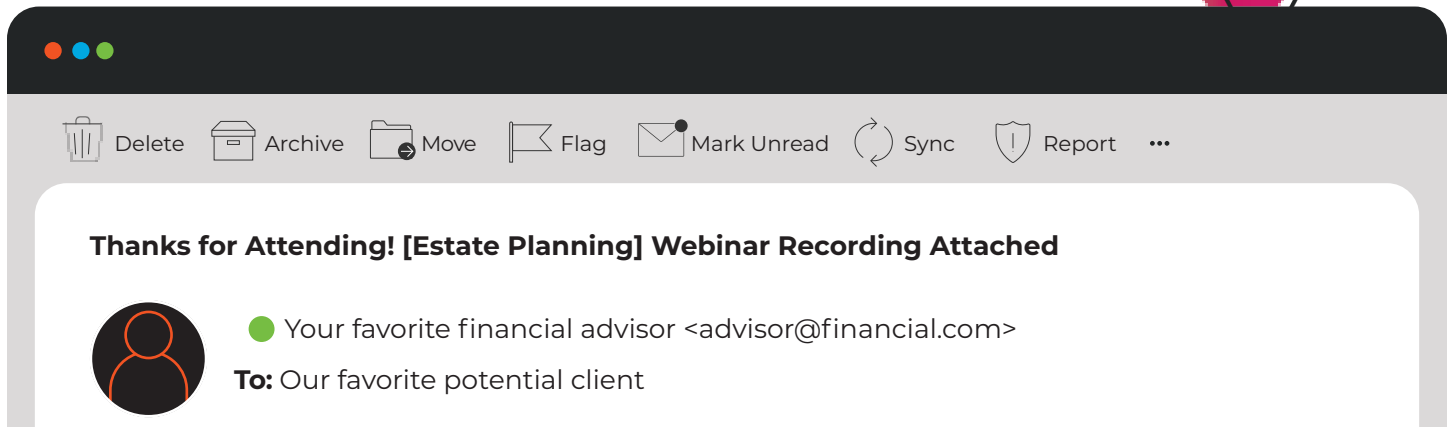
Name

Phone #, Email



VIRTUAL SEMINAR ESTATE PLANNING

DAY 1: EMAIL (ATTENDED, NO APPT SET)



Hello, [name],

Thanks so much for attending yesterday's webinar event! I sincerely hope you found the webinar helpful and that you were able to learn something new about [estate planning and asset preservation].

Here is a link to the webinar recording [link to recording] and all bonus resources [link to resources] I promised to send. Would you happen to have 10 minutes this week for a brief phone call? I would love to connect and offer a free complimentary strategy session.

You'll walk away feeling better prepared with the confidence knowing you are taking the necessary steps toward a successful retirement by getting your personal concerns and questions addressed.

Talk to you soon!

Regards,

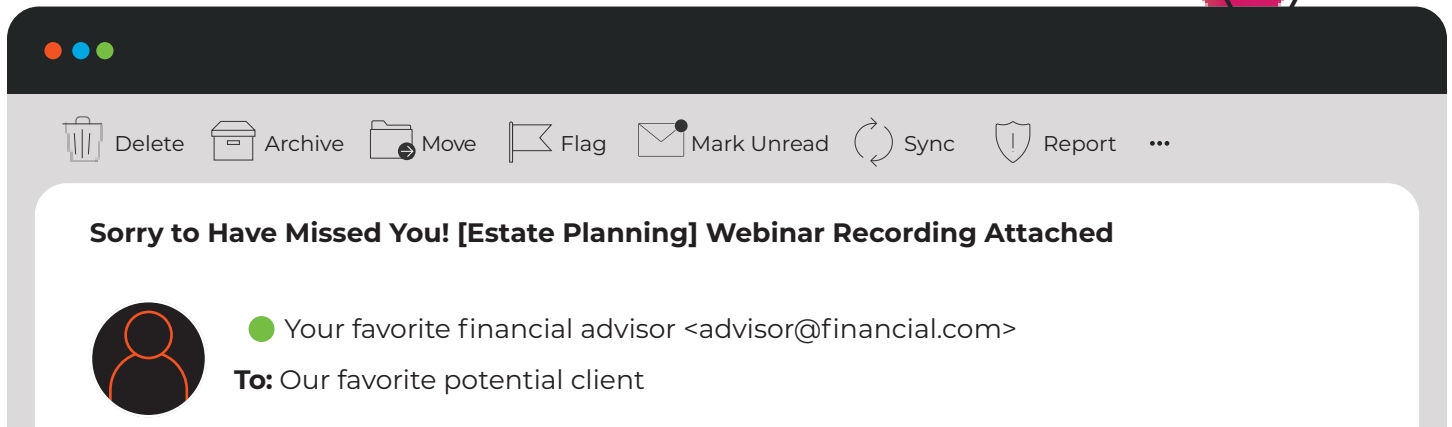
Name

Phone #, Email



VIRTUAL SEMINAR ESTATE PLANNING

DAY 1: EMAIL (REGISTERED, DID NOT ATTEND)



Hello, [name],

Thank you for registering for yesterday's webinar event! I'm sorry to have missed you during the session. We covered:

- [Advantages and disadvantages of wills and trusts.]
- [Reducing tax exposure when transferring assets to heirs.]
- [The documents needed to preserve your estate.]

If you're interested in watching the webinar replay, you can access it here: [link to recording].

Please reach out if you have any questions or want to talk more about [how to preserve your assets and develop an estate plan].

Best regards,

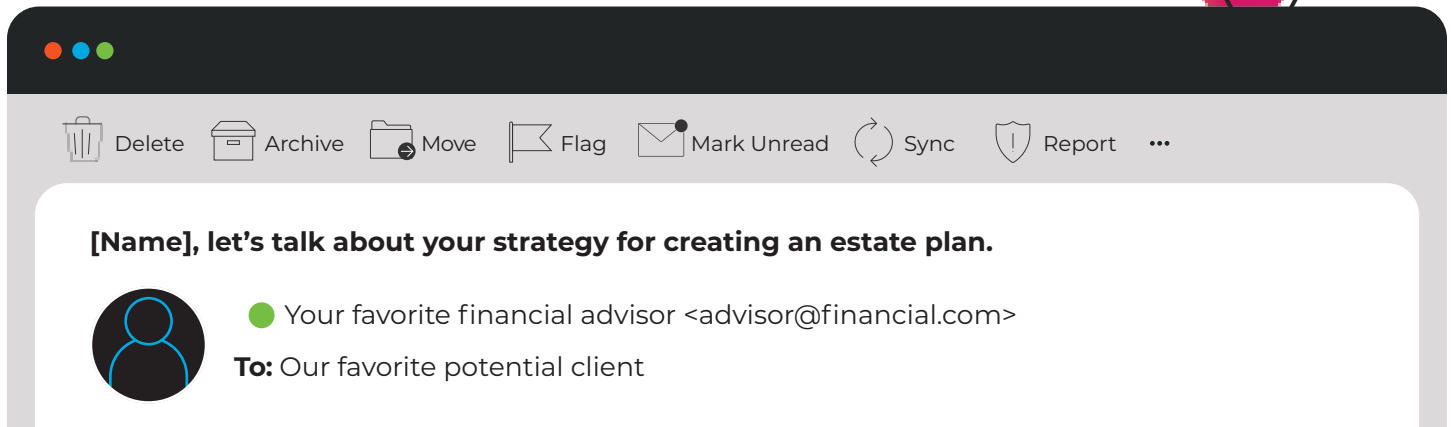
Name

Phone #, Email



VIRTUAL SEMINAR ESTATE PLANNING

DAY 3: EMAIL (ATTENDED, NO APPT SET)



Hi, [name],

Hope you're doing well! Are you interested in a complimentary strategy session to discuss [strategies for estate planning and wealth preservation]?

This is a great opportunity to get direct feedback from me on your top concerns, your current plan and any potential gaps you may have in your estate plan. It's never too early or too late to make sure you have a reliable plan in place.

Would you happen to have 10 minutes this week for a brief phone call? You can respond back to this email to let me know or call the number below.

Best,

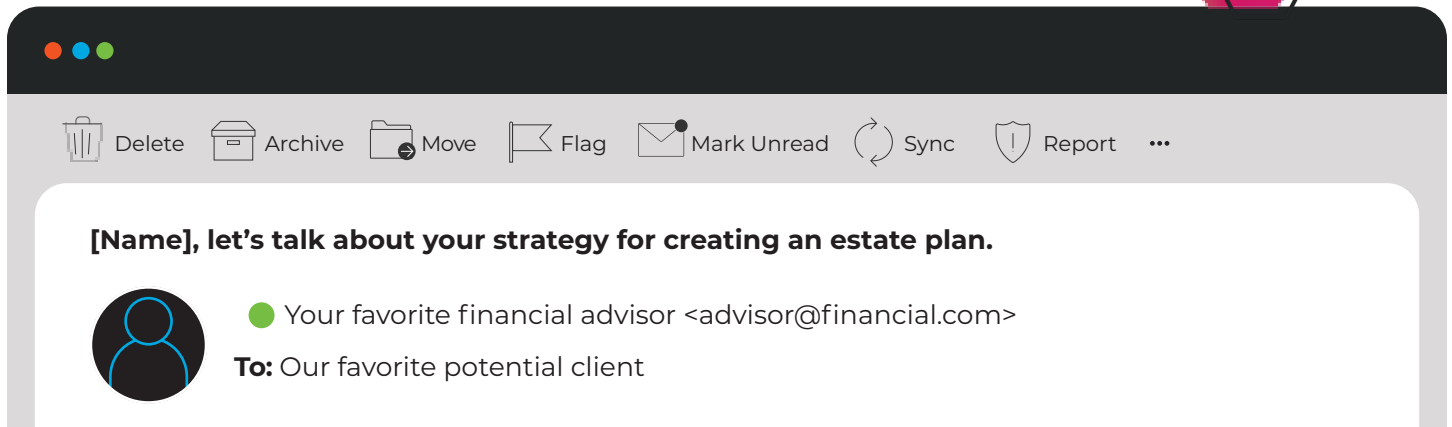
Name

Phone #, Email



VIRTUAL SEMINAR ESTATE PLANNING

DAY 3: EMAIL (REGISTERED, DID NOT ATTEND)



Hi, [name],

Hope you're well. My team is accepting a limited number of one-on-one strategy sessions, either virtually or in person, for anyone who was unable to attend our Estate Planning seminar on [date].

This is a great opportunity to get direct feedback from me on your top concerns, your current plan and any potential gaps you may have in your estate plan. It's never too early or too late to make sure you have a reliable plan in place.

Would you happen to have 10 minutes this week for a brief phone call? You can respond back to this email to let me know or call the number below.

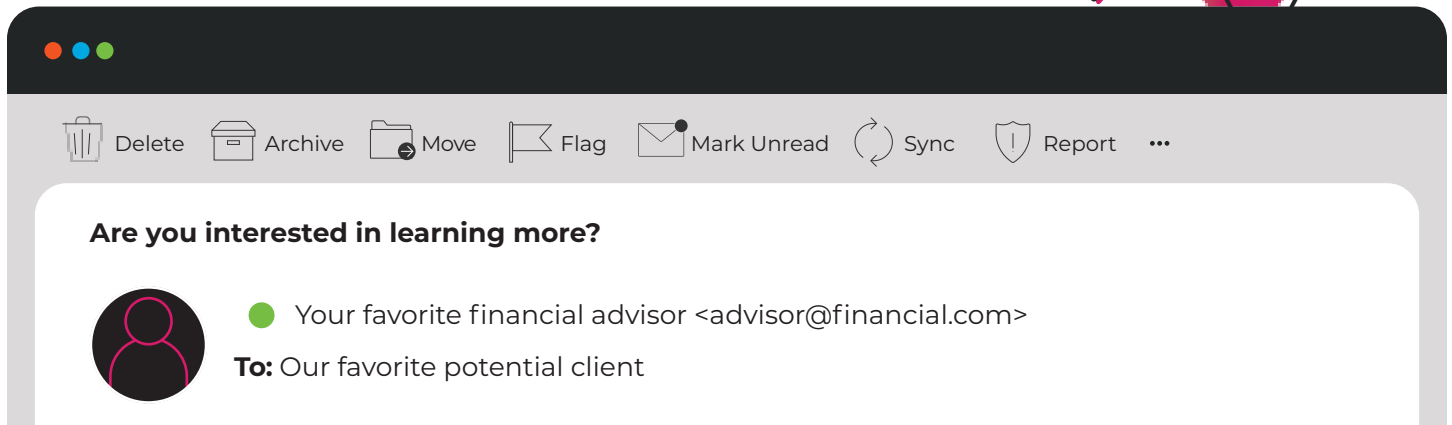
Best,

Name

Phone #, Email

VIRTUAL SEMINAR ESTATE PLANNING

DAY 5: EMAIL (ATTENDED, NO APPT SET)



Hi, [name],

I wanted you to send you a personal invite for my next seminar, [title], taking place on [date/time]. This time, we'll be discussing [seminar synopsis]. It'll be a great time to refresh on what we covered at the last webinar and get additional guidance, address any concerns, and walk away with tangible resources that you can apply to your holistic retirement plan.

Let me know if you'd like to join us and I'll save you a spot!

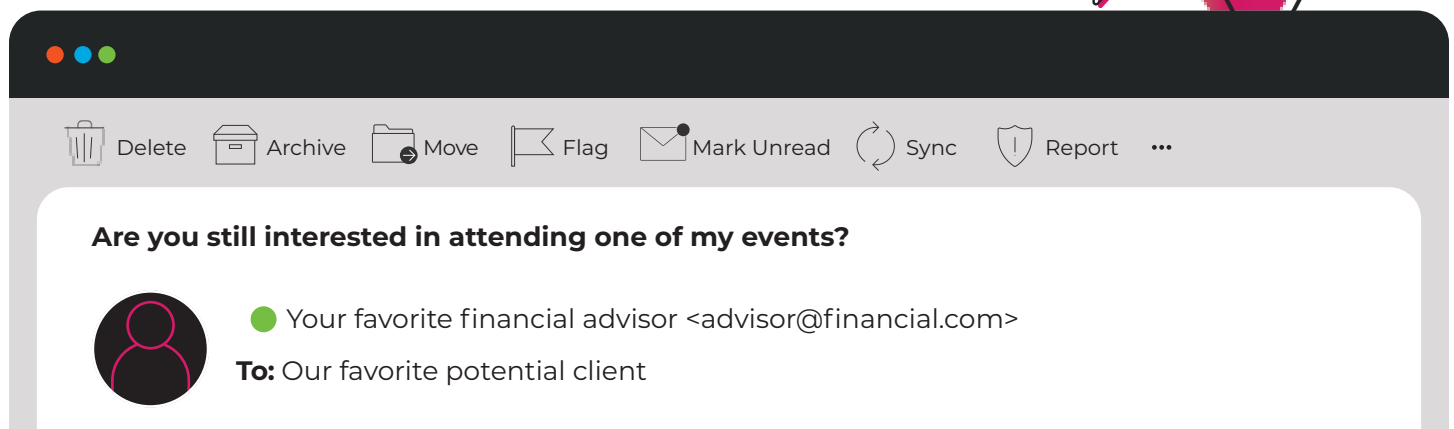
Looking forward to hearing from you.

Name

Phone #, Email

VIRTUAL SEMINAR ESTATE PLANNING

DAY 5: EMAIL (REGISTERED, DID NOT ATTEND)



Hi, [name],

Since you weren't able to attend the Estate Planning webinar last week, I wanted you to send you a personal invite for my next seminar, [title], taking place on [date/time]. This time, we'll be discussing [seminar synopsis].

Let me know if you'd like to join us and I'll save you a spot.

Looking forward to hearing from you.

Name

Phone #, Email