



# Practice Makes *Perfect*

## Live Webinar Campaigns

We have found that the **Live Webinars** are generating higher appointment scheduling ratios compared to the **On-Demand Webinars**. If a prospect dedicates the time to attend the webinar, they are warmer and more motivated. It has a more personable feel than a pre-recorded webinar and you can engage the audience.

The “Poll” feature in Zoom, allows the prospects to be able to select the call-to-action they would like and schedule the best day and time for their call. You are creating the urgency and “attracting” not chasing the prospects. Most webinar platforms have a similar feature.

The time-frame of the marketing campaigns is critical to the success of these webinars, as well as the follow-up with the prospects. If you start marketing it too far in advance, you will have a huge falloff in attendance. There are several additional steps you will need to take to reduce the falloff in attendance, as well as to engage the audience.

### **Marketing Webinars:**

**Big AI**'s digital marketing system has had the highest response ratios out of all the different companies and avenues we have tested. With a \$2,500 budget, we typically receive 65-100+ RSVP's. When you set the budget, it doesn't mean that you will spend that total amount, as it is determined by the engagement, impressions and conversions. His system has a monthly fee of \$1,500 and then you can set the budget you want for as many webinars as you like. If you are interested in getting a call scheduled to learn more about this with Big AI, just send me an email: [Andrew Thorpy](mailto:Andrew.Thorpy).

You can also use **LeadJig**'s digital marketing campaign to promote your webinars as well. Typically seeing lower response ratios, but there are benefits with the information gathered about the prospects signing up and integration of data automatically being entered in our online metrics system. You can choose your budget but wouldn't recommend spending under \$1,500.

Also, highly recommend that you email your prospect lists the webinar invite as well. This can be sent through **iContact** and schedule to send 3 days prior, 1 day prior and day of the webinar.

### **Webinar Topics:**

**- RMD Webinar**

- **Video**
- **PowerPoint**
- **Script**

**- SS Webinar**

- **Video**
- **PowerPoint**
- **Script**

**- Corona-Economy Webinar**

- **Video**
- **PowerPoint**
- **Script**

**- Sink or Swim Webinar**

(Same as Corona Economy, but title and first 2 slides have been tweaked)

- Video (same as the corona economy, no recordings yet)
- **PowerPoint**
- **Script**

**- Estate Planning Webinar**

- **Video**
- **PowerPoint**
- **Script**

**Webinar Platforms:**

There are several webinar platforms the you can choose to use for live webinars. We have used both **GoToWebinar**, **Big Marker** and **Zoom**, but there are others you can choose from as well. The choice is yours and you are responsible for test the technology prior to the webinar to ensure you don't have any last minuet issues. If you would like some assistance setting up a Zoom webinar or testing your webinar, please contact: Samantha Maher at [smaher@advisorsacademy.com](mailto:smaher@advisorsacademy.com)

- [Zoom – Live Webinar Instructions](#)
- [GoTo Meeting – Live Webinar Instructions](#)
- [Big Marker Preflight Checklist](#)

### **Increasing Attendance Ratios:**

#### **- Call all prospects within a day they RSVP**

- Ideally, the advisor should make the calls, but staff can as well
- Build rapport, ask what they want covered, get them excited

#### **- Email reminder day before and day of the webinar**

- Send a reminder email to all attendees the day before and the day of the webinar with their login information
- You can set that up in Zoom to handle those emails or do it in iContact

#### **- Reminder call day of the webinar**

- Staff can make the reminder call
- Calls should start the morning prior to the webinar starting

#### **- Text reminder the day of the webinar**

- There are different texting services you can utilize as another touch to increase the attendance ratios
- LeadJig offers this service, as well as Big AI's system
- **Important:** Make sure you submit to compliance the text copy before sending to all the prospects and you must save this communication in your files

#### **- Engaging prospects during/after the webinar**

- At the beginning of the webinar, tell the prospects that you will answer all their questions at the end
- As prospects type in questions, the advisor should recognize and engage these prospects by name

### **Follow-Up with Webinar Prospects:**

For prospects that sign up to watch your workshop webinars, we recommend you call them the day after they sign up, to try to schedule the “15-min” call with the advisor. Although you are offering the “15-min” call with the advisor, you should be blocking out 30-min on their schedule. You can use the same 3-call follow-up process, that we normally use for workshop prospects.

- **Follow-Up Process**
- **Email Follow-Up Webinar Prospects**

**Call Confirmation Letters/Emails:**

- **Corona-Economy Confirm Letter/Email**
- **RMD Webinar Confirm Letter/Email**
- **SS Webinar Confirm Letter/Email**
- **EP Webinar Confirm Letter/Email**

**Advisor “15-minute” Call Outlines:**

- **Corona-Economy Webinar Prospects**
- **RMD Webinar Prospects**
- **SS Webinar Prospects**
- **EP Webinar Prospects**

**Additional Resources for Virtual Meetings:**

- **Online CFQ**
- **Social Security Checklist**
- **DocuSign Instructions**
- **Secure Document Upload via Marketing Order Form**
- **Dave’s Video Closing over the Phone**
- **Using the Drawing Tablet over the Phone**
- **Using Technology over the Phone**
- **Talking Prospects thru Statements** (overcoming no need for income)
- **Reading Statements Cheat Sheet**

**Important Compliance Reminders:**

- 1. Submit the Facebook Ads, Sign-Up Page, PowerPoint, and Email Invite, prior to marketing the webinar: [Advertising@soundincomestrategies.com](mailto:Advertising@soundincomestrategies.com)**
- 2. Record your live webinar to send to compliance after the webinar to the email above**
- 3. Any text messages sent/received and any comments/chats during the webinar need to be submitted with your monthly correspondence: [Compliance@soundincomestrategies.com](mailto:Compliance@soundincomestrategies.com)**

