



# Practice Makes *Perfect*

You dropped \$5,000 on a workshop mailer, and now you have a bunch of qualified prospects that have signed up to attend. But, are you maximizing your follow-up procedures to get the best ROI?

If one or more steps are missed before, during, or after the workshop, you could be missing a significant amount of appointments and new clients.

Working with Acquire and Leadjig, we have developed new techniques and strategies to increase our response ratios, number of attendees, and overall number of appointments set from these workshops. I am finding that many advisors and staff members are unaware of all the new processes with this integration of technology and staff responsibilities.

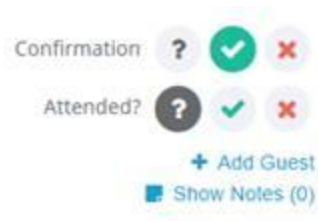
The procedures outlined below will help to increase the odds that these prospects will:

- Attend the workshop
- Sign up for an appointment
- Show up for the appointment
- Harvest additional appointments from “no-shows”

## **Workshop Prospects Follow-Up Outline**

### **Day before the workshop:**

1. Check Leadjig to see if the prospects have responded to the confirmation email. If the check-mark circle is green, then they responded to the email confirmation.



2. Call the prospects to get a verbal confirmation, build rapport, excite them, and answer any questions they may have about the venue, room, or parking. You can also gather questions to pass along to the advisor.
3. Make sure to acknowledge if they responded to the email confirmation already! If they didn't, you don't need to mention it on your call with them.

*"I know you responded to the email confirming you will be attending the workshop tomorrow, but I just wanted to call to introduce myself and see if you had any questions regarding..."*

4. Log into the Advisors' Academy website to download the most recent, updated feedback/blue sheets. The links below are the most recent as of September 2017:  
[RMD Feedback Sheet](#)  
[SS Feedback Sheet](#)  
[EP Feedback Sheet](#)
5. Check the advisor's schedule for the next three weeks to block out all scheduled calls and appointments on the feedback/blue sheet. You want 50-60% of the dates blocked out to create the illusion the advisor is extremely busy and only has a handful (40%) of appointments that he left open to meet with the attendees. You should also add the dates in each column. Below is an example of how it should look:

Please choose a time slot for your complimentary RMD Analysis. (Gray = Not Available)

	MON 9/4	TUE 9/5	WED 9/6	THU 9/7	FRI 9/8
9:00 AM					
10:00 AM					
11:00 AM					
12:00 PM					
1:00 PM					
2:00 PM					
3:00 PM					
4:00 PM					
	MON 9/11	TUE 9/12	WED 9/13	THU 9/14	FRI 9/15
9:00 AM					
10:00 AM					
11:00 AM					
12:00 PM					
1:00 PM					
2:00 PM					
3:00 PM					
4:00 PM					
	MON 9/18	TUE 9/19	WED 9/20	THU 9/21	FRI 9/22
9:00 AM					
10:00 AM					
11:00 AM					
12:00 PM					
1:00 PM					
2:00 PM					
3:00 PM					
4:00 PM					

I do not have my schedule with me at this time. Please call me **within 24 hours** to schedule an appointment.

Best phone number to reach you: \_\_\_\_\_

Best time to call you: \_\_\_\_\_

### Day of the workshop:

1. Print a list of the prospect names for your sign-in sheet. This can be exported from Leadjig.
2. As prospects enter the room, meet/greet and build rapport with them as you get them to sign in.
3. Bring some 6" x 4" index cards folded in half for prospects to write their first name and place at their desk when they sit down. Name tags are too small to read, so this helps the advisor build rapport with the prospects by calling on them with their name.
4. Once the advisor has pitched the feedback/blue sheet for the final time at the end, you may walk around to collect them when they raise their hand or stand up.
5. It is important to see if they have checked off a tentative date/time. If they have not, try to convince them to check off a tentative date/time.

Here are the two most common objections:

#### **1. I don't have my calendar with me...**

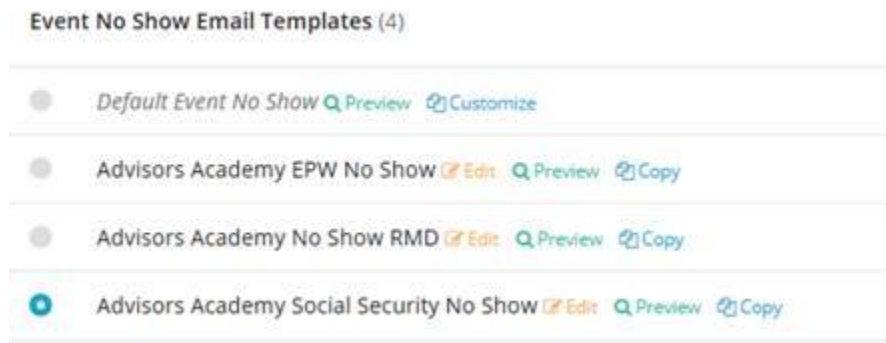
"I understand you don't have your calendar with you tonight but (**Advisor**)'s schedule is filling up quickly and I don't want you to miss this excellent opportunity to meet with (**Advisor**). This offer is only available for the next 3 weeks, and after that, he is completely booked servicing his loyal clients. I will call you in the morning to confirm the tentative date you put down tonight, and if we need to move your appointment around, that shouldn't be a problem."

## 2. I already have a financial advisor...

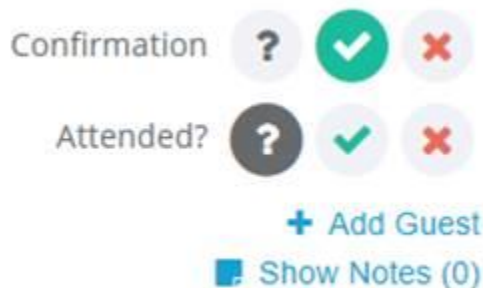
“I understand you already have an advisor, which isn’t a problem at all. 90% of the people (Advisor) meets with already have an advisor too. They just want a second pair of eyes to review their investments—to ensure they are suitable and in their best interest. (Advisor)’s schedule is filling up quickly, and I don’t want you to miss this excellent opportunity to meet with (Advisor). This offer is only available for the next 3 weeks, and after that, he is completely booked servicing his loyal clients. I will call you in the morning to confirm the tentative date you put down tonight, and if we need to move your appointment around, that shouldn’t be a problem.”

### Day after the workshop:

1. Log into Leadjig, and select the appropriate no-show email template based on the workshop topic.
  - a) Click on “Content Center,” then “Event No Show Email Templates”



2. Then, go through the list of prospects to check off if they attended or not. The no-show email will be sent to those who didn’t attend or canceled.



3. Call all the prospects who choose a tentative date/time to confirm their appointments. Refer to the “3-Call Process” below.

4. Call all the prospects who didn't choose a date/time to try to schedule them an appointment. Refer to the "3-Call Process" below.

### **3-Call Process and Email Follow-Up:**

1. If you are unable to reach the prospect by phone in the morning, don't leave a message. The best morning call times are 8:30 a.m.-9:30 a.m. according to an MIT study.
2. Call them again that evening and don't leave a message if they don't pick up. The best time to reach prospects in the afternoon will be determined by their age and if they are retired. Anyone that is still working will be more likely to answer between 5:30 p.m.-6:30 p.m. If they are retired, you can target them around 4 p.m.-5 p.m.
3. You have now called them in the morning and evening but have not left a voicemail. This increases their curiosity, and they will be more likely to pick up on the third call on the morning of the second day after the workshop. If you had left a message on the first or second call, you wouldn't have been able to call them again because you would have been viewed as a nagging pest.
4. The third call is when you should leave a message if they still haven't picked up. There are 3 "Pest" call scripts for RMDs, EP, and SS. In these scripts, there are 5 key points about what they are going to get out of the meeting with the advisor, which have dramatically increased the amount of call backs and increased appointment-setting ratios.  
[RMD Pest Call Script](#)  
[SS Pest Call Script](#)  
[EP Pest Call Script](#)
5. Now you should wait another day for them to contact you back. If they have not responded by the fourth day, you can email them offering two dates and times.  
[RMD Prospect Follow-Up Email Template](#)  
[SS Prospect Follow-Up Email Template](#)  
[EP Prospect Follow-Up Email Template](#)
6. You should wait two to three days for them to respond before making the final call. That verbiage is in the "Pest" call script documents above. At this point, you will just add them to your social media and drip-marketing campaign.



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