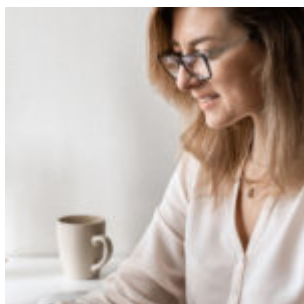


# Using Virtual Events to Attract Prospects and Engage Clients



Serious question: Why are Zoom happy hours so painful?

Hypothesis: Because trying to hold what is typically a casual, low-key, spontaneous event in a scheduled format on a platform that only allows one person to speak at a time turns “happy hour” into an unbearably awkward conference call. At least it’s an excuse to crack a beer?

But when our team added a trivia game, breakout rooms, and prizes to our virtual happy hour? Game changer. We had a blast getting to know each other (in the process, discovering the Disney, Star Wars, and Lord of the Rings nerds among us), and the hour flew by.

In order to be worthwhile, virtual events require a little more structure, a little more planning, and a little more thought than their in-person counterparts. But with the COVID-19 pandemic forcing the cancellation or rescheduling of large, in-person events, virtual conferences and webinars are rapidly becoming a powerful way to drive client engagement and capture prospect attention.

Hosting a webinar or seminar could be a great opportunity to reconnect with your clients or attract new ones—if you do it right.

The good news? We’re here to help! Not only have we compiled a collection of tips and best practices for running a wildly successful virtual event, but Market\*r, our marketing automation platform, is well equipped to help you stand out in a sea of virtual conferences and remote not-so-happy hours.

## **Before the Event**

## *Choosing Your Topic*

This is the foundation of your event, so choose wisely! Pick a topic that you are both passionate and knowledgeable about, and one that will appeal to a wide audience. Try to make your angle unique; for example, instead of a seminar simply about Retirement, how about Planning Your Future with Peace of Mind? Here's where some of that audience understanding and empathy comes into play. What do your clients and prospects need? How can your event help to provide it?

The campaigns on the Market\*r platform add a boost of excitement to traditionally dry topics like insurance and retirement by approaching them from new, unexpected, or more humanized angles. Learn more about what's available [here!](#)

## *Promotion*

Once you've landed on a topic and selected a date, it's time to let people know about your event. Creating a landing page to host all of your event details—including theme, date, time, and registration links—is a great way to build awareness about the services of your firm along with your expertise about your event topic. Your landing page should be clear, consistent with your firm's branding, and offer an easy way for interested visitors to register for your event.

Next, pair social media posts with email promotions to drive a cohesive experience and generate greater interest. Typically, it takes three touches for something to stick. That could be an email showcasing your event, a social media post, and a mention of the event in your monthly newsletter. We tend to see the highest engagement rate the week before the event, but that doesn't mean you should wait until then to start your promotions! Remember: at least three touches. We recommend that you start your promotion at least a month in advance, and plan a "Last Call" email for 24 hours ahead of the event.

The Market\*r platform makes it easy to customize landing pages, emails, and social media posts to your event's specifications. We build everything for you; all you need to do is add the personalized details!

## *Preparation*

You've chosen your theme, sent your promotional emails, and posted about your

event on social media.

Now it's time to make sure you're ready to rock. Whether you're recording your webinar or hosting a live event—and whether or not you plan to use a script—we strongly encourage you to practice in advance. And when you do, be cognizant of time. No matter how interesting your topic is, people's attention will start to wander after about 30 minutes. Keep it tight and compelling, and leave some time at the end for questions.

## **During the Event**

Our best advice for hosting a great seminar, or conducting a successful webinar recording?

Get comfortable.

We don't mean host your event lounging in bed—especially if you're on video! But you're going to be glued to your seat for at least an hour, so make sure it's a comfortable one. Keep a glass of water with a straw nearby, and use the mute button to take discrete sips throughout.

And think about your audience, especially if you're on video. Backlighting is never your friend: It will make you look washed out and unprofessional. Instead, set up a lamp in front of your screen to create a nice glow on your face. Eliminate any background distractions, such as noise from an air conditioner or dryer.

Finally, let your personality shine through! We mentioned using a script earlier, and that's absolutely fine if that helps boost your confidence. But you want to avoid sounding like a pre-programmed financial cyborg, so throw in a personal anecdote or a joke, and just laugh it off if your dog barks in the background. Now more than ever, we're all craving human connections. Don't be afraid to make them!

## **After the Event**

You did it—your audience is inspired, educated, and ready to take action. Now is your opportunity to capitalize on that engagement.

First, offer a takeaway resource from your webinar: a piece of content like a whitepaper or an ebook that expands upon the topic you chose. This will keep the

presentation fresh for your audience and remind them about future action items.

On the Market\*r platform, you can customize our whitepapers for any campaign you choose to fit your event theme and include your contact information. These can easily be printed or linked in future emails.

Speaking of emails, a nurture campaign is the perfect way to remain engaged with your audience after your event. Customize the first email as a thank you, and include a link to the webinar recording, as well as the complimentary whitepaper.

Use the remaining emails in the workflow to continue informing your audience about your topic and promote your firm's services. By sending the emails through Market\*r, you can add Orion Planning workflow links as your CTA, or call-to-action, prompting clients and prospects to get started setting the financial goals that *you* can help make reality.

Ready to learn more about Market\*r *and* see our virtual event tips in action? Join our upcoming webinar, The Significance of Financial Planning, which will help you more easily implement financial planning at your firm, as well as leverage Market\*r to communicate its importance to your clients.

Want to get started right away? Get in touch with us about a personalized demo of Market\*r for your firm.

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