

# THE PUBLIC PROGRAM OPTION

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NSA Conference  
February 2010

Self-sponsored programs—profitable outbound marketing or money sinkholes that side-track you from marketing activities that work?

LINDA KEITH, CPA, CSP  
Business & Lending  
Consultant | Trainer | Speaker  
[www.LindaKeithCPA.com](http://www.LindaKeithCPA.com)

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Linda helps lenders make good loans and make more of them at banks and CUs throughout the country. She self-sponsors 3 seminar series a year ~ 3 days per city in 5 cities on the West Coast ~ and has for over 15 years. These are small sessions with 15 - 30 attendees.

Her public programs add credibility, market her services to her preferred geographic market, dramatically increase her client list and allow her to control her calendar. Oh, and yes, they make money most of the time..

During the '08/'09 recession, Linda's target market of community banks was one of the hardest hit. In these handouts you'll learn how she adjusted her marketing and approach to keep money flowing even as banks cut back on training budgets.

We revisit these ideas and processes regularly. If I had given this presentation five years ago, it would be different. It will change in the next year. Please email me with your good ideas to add to my good ideas!

[Linda@LindaKeithCPA.com](mailto:Linda@LindaKeithCPA.com)

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## HOW TO USE THIS PLAN:

- √ Review each section
- √ Write your own ideas
- √ Consult with others in NSA with public program experience
- √ Make a firm go/no go decision
- √ Implement your plan
- √ Revise as needed

## WHAT?

- A program that you publicize, schedule and for which you sell individual seats.
- Topic can be personal or business.
- Seats can be paid for by individuals or the companies that send them.

## WHY?

### Linda's IDEAS...

- My marketplace includes community banks and credit unions that may not be large enough to regularly schedule internal training.
- My clients know they can send a new hire to get the same credit training within four months of hire date.
- By sponsoring my own programs, I have more control over holes in the calendar.
- The flyers for the public programs are the outbound marketing for internal training as well.
- My client list is much longer, and more impressive, because it includes every bank and credit union that has sent someone to a public program.

### Other speaker's IDEAS...

- Some speakers use public programs to feed their coaching, consulting or internal training divisions.
- Some speakers use public programs to sell their products

## WHY NOT?

### Linda's IDEAS...

- The cost is significant
- The time invested is significant
- If the program cancels or makes less money, you have tied up your calendar
- You can loose money!!!!

**My IDEAS:**

**My Plan:**

**TOPIC:**

**TITLE:**

**My compelling reasons to launch, continue or expand my public seminar offerings:**

## WHO?

What are the characteristics of a group to whom you could successfully market your public seminar?

Your IDEAS...

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More IDEAS...

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### To Do:

- Research others who are doing a similar topic. Take a look at their 'Who Should Attend' list.
- Consider groups that you have credibility with already...don't move away from your roots too quickly.
- Consider groups you have spoken to in the last two years...which ones really clicked!

### Linda's market:

Lenders to businesses and to self-employed borrowers.

If I want to be more narrow:

- |                          |                         |
|--------------------------|-------------------------|
| • Credit Union lenders   | • Examiners             |
| • Bank lenders           | • Internal Auditors     |
| • Mortgage lenders       | • Consumer lenders      |
| • Commercial lenders     | • Loan managers         |
| • Loan originators       | • Underwriters          |
| • Chief Lending Officers | • Commercial RE lenders |

### NOTES:

#### My Plan:

Who will I market to?

#### More specifically:

- \*
- \*
- \*
- \*
- \*
- \*
- \*
- \*

Can I narrow it further?

*Narrower niches ease marketability through exposure (articles and freebie speeches), list acquisition and referral network development. They talk to each other, read the same magazines and books, and congregate.*

## WHERE?

It is likely that there are many more locations that would benefit from your seminar than there are places you want to go or can fit on your schedule.

**What are some criteria for what cities to select?**

Your IDEAS...

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More IDEAS...

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**To do:** Research others who are doing a similar topic. What cities are they presenting in? What hotels? Do people fly in? How far do they drive?

**Linda's choices:**

- Large metro areas (participants travel up to 300 miles)
- Western U.S.
- In bed by midnight on the last seminar day.
- Can fly home in 2-1/2 hours or less
- Family or friends to visit

**NOTES:**

**My Plan:**

What are my criteria for choosing a city?

How far will people travel to attend? Will they stay overnight?

How many cities do I want to include?

What cities am I considering?

Why?

www.census.gov/population/cen2000/phc-t29/tab03a.xls

F=Flight, G=Grnd

Rank	Metro Area	Pop 2000	% Inc	Travel hrs	Visit?
1	New York-Northern New Jersey-Long Island, NY-NJ-PA <sup>2</sup>	18,323,002	8.8		
2	Los Angeles-Long Beach-Santa Ana, CA	12,365,627	9.7	2h 40m F	Mom & Family
(x)	Los Angeles-Long Beach-Glendale, CA	9,519,338	7.4		
(x)	Santa Ana-Anaheim-Irvine, CA	2,846,289	18.1		
13	Riverside-San Bernardino-Ontario, CA	3,254,821	25.7		
17	San Diego-Carlsbad-San Marcos, CA	2,813,833	12.6		
61	Oxnard-Thousand Oaks-Ventura, CA	753,197	12.6		
114	Santa Barbara-Santa Maria-Goleta, CA	399,347	8.0		
169	San Luis Obispo-Paso Robles, CA	246,681	13.6		
Total Metro Area		19,833,506			
3	Chicago-Naperville-Joliet, IL-IN-WI	9,098,316	11.2		
4	Philadelphia-Camden-Wilmington, PA-NJ-DE	5,687,147	4.6		
5	Dallas-Fort Worth-Arlington, TX	5,161,544	29.4	3h 50m F**	Brother
6	Miami-Fort Lauderdale-Miami Beach, FL	5,007,564	23.5		
7	Washington-Arlington-Alexandria, DC-VA-MD	4,796,183	16.3		
8	Houston-Baytown-Sugar Land, TX	4,715,407	25.2		
9	Detroit-Warren-Livonia, MI	4,452,557	4.8		
10	Boston-Cambridge-Quincy, MA-NH	4,391,344	6.2		
11	Atlanta-Sandy Springs-Marietta, GA	4,247,981	38.4		
12	San Francisco-Oakland-Fremont, CA	4,123,740	11.9	2h 0m F	Friend & Cousin
(x)	Oakland-Fremont-Hayward, CA	2,392,557	14.9		
(x)	San Francisco-San Mateo-Redwood City, CA	1,731,183	8.0		
27	Sacramento--Arden-Arcade--Roseville, CA	1,796,857	21.3		
28	San Jose-Sunnyvale-Santa Clara, CA	1,735,819	13.1		
82	Stockton, CA	563,598	17.3		
98	Santa Rosa-Petaluma, CA	458,614	18.1		
162	Santa Cruz-Watsonville, CA	255,602	11.3		
Total Metro Area		8,934,230			
14	Phoenix-Mesa-Scottsdale, AZ	3,251,876	45.3	2h 50m F*	Brother
193	Yuma, AZ	160,026	49.7		
237	Flagstaff, AZ	122,366	20.2		
Total Metro Area		3,534,268			
15	Seattle-Tacoma-Bellevue, WA	3,043,878	18.9	1h 15m G	Home
(x)	Seattle-Bellevue-Everett, WA	2,343,058	18.8		
(x)	Tacoma, WA	700,820	19.6		
176	Bremerton-Silverdale, WA	231,969	22.3		
189	Olympia, WA	207,355	28.6		
Total Metro Area		3,483,202			
16	Minneapolis-St. Paul-Bloomington, MN-WI	2,968,806	16.9		
18	St. Louis, MO-IL	2,698,687	4.6		
19	Baltimore-Towson, MD	2,552,994	7.2		
20	Pittsburgh, PA	2,431,087	-1.5		
21	Tampa-St. Petersburg-Clearwater, FL	2,395,997	15.9		
22	Denver-Aurora, CO <sup>1</sup>	2,179,240	30.7	2h 34m F*	Cousin
86	Colorado Springs, CO	537,484	31.3		
158	Boulder, CO <sup>1</sup>	269,814	29.1		
166	Fort Collins-Loveland, CO	251,494	35.1		
317	Grand Junction, CO	116,255	24.8		
Total Metro Area		3,354,287			
23	Cleveland-Elyria-Mentor, OH	2,148,143	2.2		
24	Cincinnati-Middletown, OH-KY-IN	2,009,632	8.9		
25	Portland-Vancouver-Beaverton, OR-WA	1,927,881	26.5	1h 30m G	
129	Salem, OR	347,214	24.9		
139	Eugene-Springfield, OR	322,959	14.2		
208	Medford, OR	181,269	23.8		
319	Bend, OR	115,367	53.9		
363	Albany-Lebanon, OR	103,069	13.0		
373	Roseburg, OR	100,399	6.1		
Total Metro Area		3,098,158			
548	Walla Walla, WA	55,180	13.9		

Linda's Schedule:

LA  
3/yr

Anaheim  
3/yr

Considering

Burlingame  
3/y

Considering

Seattle  
3/yr

Considering

Portland  
3/yr

Example of  
Local

## WHEN?

Time of year, time of day, day of the week.  
1 hour, 2 hours, half-day, full-day, multiple days. What is best for you and your target audience?

### How much?

The more you charge the longer the presentation may need to be. Public seminar pricing may be more sensitive to competition than in-house training. Maybe not. I charge more than my competition as one way I demonstrate value? Perhaps it depends on whether an individual is paying or their company is paying?

### How often?

This will impact the 'when' choice. If you are doing a four-city tour four times a year, you are probably going to end up doing a summer workshop.

### Your IDEAS...

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### More IDEAS...

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### To do:

Research others who are doing a similar topic. Days of the week? Time they start and end? Length of their seminars? Fee? How many times a year do they return to the same city? How many presenters fill their calendar?

What is your preference? Suit yourself if it will still work.

### Linda's choices:

- Saturdays and evenings when kids were pre-school
- Weekdays once kids were in school
- Avoid any day up against a 3 day weekend
- Prefer Tu/W/Th as some people drive 4 hours or fly in
- Friday good if local participants and I'll be done early
- I avoid 1st/last day of month and last week of quarter.
- In Northwest, avoid summer.

### NOTES:

### My Plan:

What are my criteria for choosing the day/days to offer the seminar?

How long will my programs be and why?

What time will I start and end?

Is it better for me to do the same cities more often or more cities less often?

My preference for 'when':

## HOW?

Select and interact with hotels, build or buy your list, market to that list, administrative tasks, design/print/ship materials, travel, onsite jobs on seminar day.

Follow-up after to sell more speaking, coaching, consulting or products.

What a list!

### Start with how to obtain your marketing list:

#### Your IDEAS...

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#### More IDEAS...

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#### Linda's choices:

- Direct mail flyers to a purchased lists in the beginning
- Developed our own database from
  - American Banking Association Directory
  - Everyone who has ever attended
  - Everyone who has sent anyone (we ask for name of authorizing manager on the registration form)
  - Everyone who has purchased our manuals
  - Members of associations we belong to.

Caution...do not violate the rules. If you need to pay for the list, do that. I never use membership directories to pull email lists, but do for postal lists if not prohibited.

  - Periodic association break-outs although I don't like them very much.
  - Address correction service on our flyers
- Our ezine 'Lender Asks'
- We are reevaluating these decisions based on current economy and social media/online options

#### Other choices:

- Newspaper inserts
- Sales teams making mini-presentation in the area
- Co-sponsor with business/trade/professional assoc.

#### NOTES:

#### My Plan:

Do I already have an extensive list to use?

What ideas for list acquisition will work for me?

## HOW to get everything done?

Do it yourself? Outsource it? Staff?

**TIP:** Ask other NSA members if they are outsourcing any administrative work and whom they use.

### Just what is involved?

On the next page, you'll see our task list. This is done in Excel because it loads right into Outlook.

- Our template allows us to enter the Program dates and then formulas load the rest of the form.
- Kimberly (my training coordinator) then goes through the automatic dates and adjusts them for my travel schedule, holiday or other reasons.
- We import this into Outlook and each have our own task list.

### Your task list will be different

We do multiple cities, have fax and postal and email lists, split the work between us. Use our task list as a guide for your own. Also, see the RESOURCES mentioned on page 13 in these handouts.

### Consider partnering with someone else

Perhaps an association or another group has the list, markets the program, arranges for locations, handles all logistics...for part of the take.

### Linda's choices:

- Training Coordinator (TC) 30 hours per week
- TC handles all administrative functions for public programs, in-house training, product fulfillment and inbound marketing.
- Database staff person 10 hours/week
- Linda is the onsite coordinator and handles all onsite functions
- Because her groups are small, average 20 attendees or less, she does not need to hire temp help for the day.

### Our Tools:

On the following pages you'll see some of the tools we use in putting on a public program series. Take these ideas and adjust them for your situation.

### NOTES:

#### My Plan:

My current staffing situation:

Do I have time to do this myself?

Do I have the know-how?

Do I have the inclination?

My plan for administering the public program:

WHO	Priority	Notes	
Linda & Staff	Normal	Select City & Dates	10 weeks out
Staff	Normal	Call Confirm Hotels & Fax Contact Sheets	9 weeks out
Linda	Normal	Send Follow-up email to last series	9 weeks out
Staff	Normal	Add Programs to Website	9 weeks out
Linda	Normal	Send out last series CERTS	9 weeks out
Staff	Normal	Add dates to Website and Shopping Cart	9 weeks out
Staff	High	Update Database/Count/Sort	9 weeks out
Staff	High	Revise/Design Flyer	9 weeks out
Linda	High	Review Flyer & Approve	9 weeks out
Staff	High	Flyer to Printer	9 weeks out
Staff	Normal	Enter Projections in Inventory.xls	9 weeks out
Staff	Normal	Schedule Mailings w/ Mail svc (Apex)	9 weeks out
Staff	High	Apex pick-up Flyer	8 weeks out
Staff	Normal	Update Fax Db	7 weeks out
Staff	Normal	First Fax Notice Sent	7 weeks out
Staff	Normal	Update Email Addresses	7 weeks out
Staff	Normal	E-Notice Sent	7 weeks out
Staff	Normal	Send Apex Pst \$ for 1st Mailing	7 weeks out
Staff	Normal	Updated list to Mail svc	7 weeks out
Staff	Normal	Apex process First Mailing	7 weeks out
Staff	Normal	Return Signed Contracts	5 weeks out
Staff	High	Order Manuals from Printer if needed	4 weeks out
Staff	Normal	Send Apex Pst \$ for 2nd Mailing	4 weeks out
Staff	Normal	Apex process Second Mailing	4 weeks out
Staff	Normal	Manuals from Printer	3 weeks out
Linda	Normal	Travel Arrangements - Air	3 weeks out
Linda	Normal	Travel Arrangements - Hotel	3 weeks out
Linda	Normal	Travel Arrangements - Ground	3 weeks out
Staff	Normal	Call Phone Reservations Not Received	2 weeks out
Staff	Normal	Fax Reminder Sent	2 weeks out
Staff	Normal	Ship Manuals.	2 weeks out
Staff	Normal	Track UPS	2 weeks out
Staff	Normal	Final Call to Hotel	1 week out
Staff	Normal	Final entry for Sign-in sheets	1 week out
Staff	Normal	Fax Linda Hotel Contracts	1 week out
Staff	Normal	Prepare Sign-in Sheets to Linda	1 week out
Linda	Normal	Pack for Program	1 week out
Linda	Normal	Transfer Phones to Staff & Back Up Computer	1 week out
Linda	Normal	Travel Day	Day before
Linda	Normal	Program (2 or 3 days)	Program Day
Linda	Normal	Send Email Templates	Day after
Staff	Normal	Transfer Phones back to Linda	Day after
Linda	Normal	Check Phones Back?	Day after
Staff	Normal	Remove dates from Website	Day after
Staff	High	Invoice Unpays	Day after
Linda	Normal	Create Marketing Report	1 week after
Linda	Normal	Enter Marketing Report in Task list	1 week after
Staff	Normal	Manager list to Linda	1 week after
Linda	Normal	Enter Sign-in Sheet in Db	1 week after
Linda	Normal	Certificates Completed	1 week after
Linda	Normal	Certificates Mailed	1 week after
Linda	Normal	Enter Quotes in File	1 week after
Staff	Normal	Revise Costs to Actual	2 weeks after
Staff	Normal	Enter Change of Addresses in Db	2 weeks after
BOTH	Normal	Series Finalized: certs sent, templates sent, bills & unpaid invoiced, payments received, database t	3 weeks after

Before you panic, please note that most of this is done by staff.

**I need to:**

- Select city/dates
- Proof flyer
- Pack
- Do the program
- Plan the follow-up marketing based on conversations I had in class.

**Staff could do these but I prefer to:**

- Make my own travel arrangements
- Prepare and send Certificates (because I often write a personal note to go with.)

**BONUS:**

Because I need staff to support the public programs, I also have staff to work with me on everything else.

I enjoy not doing all the administrative and routine things she does for me.

We have a synergistic relationship that provides for great brainstorming, reality checks, and accountability.

We have backup that would be difficult otherwise.

		Person	PersonPerDay	% of mailing		Total
<b>0503CAAI</b>						
Average fee pd per person attending:		\$550.78				48
Average fee per pd participant/day:			288.83			82
Direct cost %	37.64%					9
<b>People Attending:</b>	<b>86</b>					13
Company Count:						17
Meeting cost/person:	\$60.62		31.79			20
Marketing cost/person:	\$87.24		45.75			5
Travel & misc/person	\$22.73	\$170.59	19.05			9
Net Profit Per:		\$380.19	\$192.24			5
<b>Response rate days:</b>	<b>1.59%</b>	1.55% SCal				9
Response rate people:	0.80%	1.49% Ncal				13
<b>Number of days in series:</b>	<b>9</b>					17
<b>Profit per day:</b>	<b>3,370.93</b>					20
Profit per day w/ half marketing costs:	<b>\$3,787.76</b>					20
<b>Total Fees</b>						
		48165.25	2616.00	4105.75	3672.75	6548.00
Cost before printing		13380.86	1386.38	1,368.16	1401.05	1658.37
Printing		4472.00	234.00	364.00	312.00	598.00
<b>Total Costs</b>		<b>17826.86</b>	<b>1620.38</b>	<b>1732.16</b>	<b>1713.05</b>	<b>2256.37</b>
<b>Net Income</b>						
		30,338.39	995.62	2,373.59	1,959.70	4,291.63
Goal:		18,000 Anaheim	5328.91 Pasadena			12846.35
		1040	9738.46 Pcorp			11389.66
<b>Number Registered</b>		<b>172</b>	<b>9</b>	<b>14</b>	<b>12</b>	<b>23</b>
Number Complimentary		8				1
Number Paid		164	9	14	12	22
To goal:		(45)	4	(1)	1	(8)
<b>Fax/Phone Reg</b>						
		897.75	299.25	299.25	299.25	299.25
Paid Date		3/15/2005	2/21/2005	3/21/2005		315.00
Total		315.00	315.00	315.00	315.00	315.00

This is the upper left side of an Excel sheet we keep for each series. This portion shows the results for our Anaheim programs. Other worksheets in the 0503CAAI workbook detail all costs and split them between cities and serve as sign-in sheets for each session. You could do this in QuickBooks using 'classes' or in Access as well.

**My Plan:**  
**How will I keep track of registrations? Track costs? Determine break-even?**

**Picking your hotel**

- What hotels are other seminar providers using?
- Ask your own clients in that area.
- Use AAA and look for a 3 diamond hotel if basic business and a 4 diamond if ritzy.

**Interacting with the hotel**

- This form is completed during first phone call and faxed to hotel before they send us a contract. Notes at bottom used for all phone calls with the hotels.
- I take hard copy with me to the venue along with the actual contract and the BEO (Banquet Event Order).
- I estimate the total bill ahead of time so if it is close at end of day, I just sign.

**My Plan:****Do I have a hotel in mind?****Does it need to be the RITZ or is Best Western just fine?****How will I pick one?****Linda Gabbert Keith, CPA, CSP**

PO Box 1366, Olympia, WA 98507

Phone: (360) 866-1982

Fax: (360) 866-1310

Kimberly Meyer, Training Coordinator

Phone: (360) 455-1569

Fax: (360) 455-1570

email: [Kimberly@LindaKeithCPA.com](mailto:Kimberly@LindaKeithCPA.com)Meeting Date(s): **April 4/5/6**

Hotel Name: Holiday Inn Express SFO

Contact: Cheri West

Direct Phone: 650-347-2381

Reservations: 650-347-2381

Fax: 650-685-2796

Email:

Address: 1250 Old Bayshore Hwy Burlingame, CA 94010

Non Smoking Sleeping Room for Linda Keith night before each meeting \$99.00

Confirmation 68220532

Website: [www.hiexpress.com](http://www.hiexpress.com)

Meeting Room: Rm 316

Room Rental: \$230

Max Capacity: 25

Screen nc

Coffee/Tea/Decaf \$3.50/per

Sodas \$2

**GENERAL NEEDS:**

Accommodate 25 attendees

8:00 am to 5:00 pm Meeting

Lunch on their own

Classroom Style – Chevron Set

Coffee Service AM – Soda Service PM

No Sleeping Rooms (except for Linda)

**ROOM SET-UP PARTICULARS:**

\* Registration table rear of room

\* Water at Tables

\* Room set by 7:30am

\* Coffee/Tea/Decaf 7:30 am

\* Head table for instructor

\* Tables Chevron Set

\* Exit room by 6pm

\* Sodas set 12:15 pm

\* Table for our projector

\* Screen

\* Three attendees/table

\* Refresh ice/soda 2pm

Post as: Day I &amp; II: Linda G Keith CPA – Tax Return Analysis

Day III: Linda G Keith CPA - Financial Statement Analysis

**Notes:** 3/17 K Ivox to Shalom currently at 21/24/20 and likely to get more. Is the San Diego room or other larger room available? 3/17 K pc with Shalom she has moved us to the Monterey room with capacity of 60 so we should be good.

## HOW to reach your target market?

- Direct mail, fax list, email
- Social media
- Mention in your ezines and articles
- Association sessions and local business speeches
- Any excuse to contact your referral sources

### Ideas:

- Review the resources recommended in the SpeakerNet News excerpt on the next page. They all have information on how to market to your list, write good copy, design flyers, etc.
- Consider if your target attendees need Continuing Education Credits and find out how to offer them.

### Linda's choices:

- Email to our list 8 weeks before.
- Flyer to our postal list 6 weeks and 3 weeks out.
- Fax to our fax list 4 weeks out.
- Every month Lenders Q&A Ezine includes a 400 word pertinent article and always has our upcoming workshop schedule.
- Our website has our calendar and our regular clients now check it whenever they have a new hire that needs our training.
- Our website is listed in our extensive manuals (have workshop materials they will not throw away).
- Dates for the next series in their city are finalized prior to the program so word-of-mouth buzz results in immediate registrations for the next series..
- Email goes out right after the seminar with a promised computer file and a reminder of the next dates to send their colleagues. (Have something of value they can get from you by email after the session.)
- Certificates are sent out within two weeks to the managers (not the attendees) with quotes from our evaluations, a sample of our Lender Q&A Ezine with an invitation to sign up, and the registration form for the next series in our area.

### Our tools:

Starting on page 14 you'll see some of the ways we keep our target list informed of our seminars.

### NOTES:

### My Plan:

#### How will I market to my target attendees?

- Direct mail
- Fax
- Email
- Ezine
- Articles in print publications
- Articles in electronic publications
- Social media

#### What do I need to do?

- Find print and electronic publications to place my articles
- Start an ezine &/or blog
- Research other seminar providers
- Get on their mailing and email notice list
- Collect flyers I like
- Hire a graphic artist who understands sales, not just design, to design my flyer

Excerpted with permission from **SpeakerNet News** 9/23/2005

**I have read and recommend those in bold...Linda**

SpeakerNet News is the award-winning weekly ezine of best practice tips contributed by its 6500 global subscribers. Additionally, they produce teleseminars, tapes, CDs, MP3s and special reports full of information for speakers, trainers, consultants, authors and coaches. For more info or to subscribe, go to <http://www.speakernetnews.com>.

Responses to my request for seminar promotion resources – Stephen Kraus (Steve@RealScienceOfSuccess.com)

\* Roy Sheppard – If you haven't already – this book is a

**MUST: "How to Develop and Promote Successful Seminars and Workshops: The Definitive Guide to Creating and Marketing Seminars, Workshops, Classes, and Conferences" by Howard L.**

**Shenson.** <http://www.amazon.com/exec/obidos/ASIN/0471527084/speakernetnews>

There's also **"Successful Seminar Selling" by Philip Calvert.** It's excellent. There are checklists in the back that make it worth the price. [Philip's book and services were also recommended by Deborah Torres Patel]

<http://www.amazon.com/exec/obidos/ASIN/1857039661/speakernetnews>

***Not sure how much experience you have – it's VERY lucrative when you get it right – but boy does it hurt when you don't!***

\* Wanda Loskot – I ordered this manual recently:

<http://www.howtomarketseminars.com/> and I am very impressed with the content. I am marketing specialist and a lot of info was bread and butter for me but I found a lot of fresh valuable advice.

\* Tom Terrific – Here are a couple of resources I'd recommend.

1. Entrepreneur Magazine's "How to start a seminar production business."
2. **"How to create and market a successful seminar or workshop" by Howard Shenson.**

<http://www.amazon.com/exec/obidos/ASIN/093068625X/speakernetnews>

\* Doug Rice – One of the fastest and easiest ways is to find a partner who will put butts in the seats. The partner is obviously topic-dependent but obvious places are Chambers of Commerce, charitable organizations, associations, etc. They all need more revenue sources, have a built in base of potential attendees, and will promote the seminar for a cut of the action. I did this with the regional association of Fire Prevention Officers and they co-sponsored a whole series of events for a 20% cut donated back to the organization.

\* Kelly Robertson – I bought **Jenny Hamby's kit** and found it very useful. <http://www.howtomarketseminars.com>

### Build the Relationships:

This is the email that goes out to the attendees within days of the seminar. What could you promise by email that they participants will really want?

**From:** Linda Keith [mailto:Linda@LindaKeithCPA.com]

**Sent:** Monday, September 26, 2005 1:02 PM

**To:** <Attendees of last seminar>

**Subject:** Linda Keith's Tax Return Worksheets in Excel

### Templates are here:

Here are the promised Excel spreadsheets for the workshop you recently took... Cashflow Analysis of Tax Returns. I know you'll find them helpful in pulling qualifying income from tax returns for businesses and the people who own them! These work for 2008/2009 tax returns. See **TEMPLATE TIPS** below the dates for upcoming workshops.

### We'll be back!

**Anaheim ~Jan 11/12/13**

**Pasadena ~ Jan 18/19/20**

**Phoenix ~ Jan 25/26/27**

You can already register online. If you want to be sure you get the reminder email with the dates (and a Lender Q&A) each time, sign up for email notification.

### Don't want to wait?

**Walla Walla ~ Oct 12/13/14**

**Seattle ~ Oct 25/26/27**

**San Francisco ~ Nov 2/3/4**

**Portland ~ Nov 8/9/10**

### Not close enough?

If you had to travel to get to the session, consider bringing me to you. Only fifteen folks in your area and I'll schedule an open-enrollment program. That is why we will be in Walla Walla in October. Or you can schedule an in-house or shared program and save even more. Call Kimberly Moore at 888-441-1569 for info or to schedule.

### Template Tips:

Reminder...they will open with an option: read-only or provide a password.

Open them **read-only** and then **save as** with your borrower's name and the year. Now each time you open the original file it will \*be\* the original file. No chance of a change for one borrower being 'saved' in the template. Each worksheet within the workbook opens with a note that you can hide once read.

This template is licensed to you for one user only...the person who attended the class. If you would like others at your credit union or bank to be able to use this template you need to purchase one for them or get a license for your network. Just send me an email and I'll get you an order form.

Enjoy...I \*really\* mean that!

Warm regards, Linda

**Linda Gabbert Keith, CPA, CSP**

**Helping lenders say "yes" to good loans!**

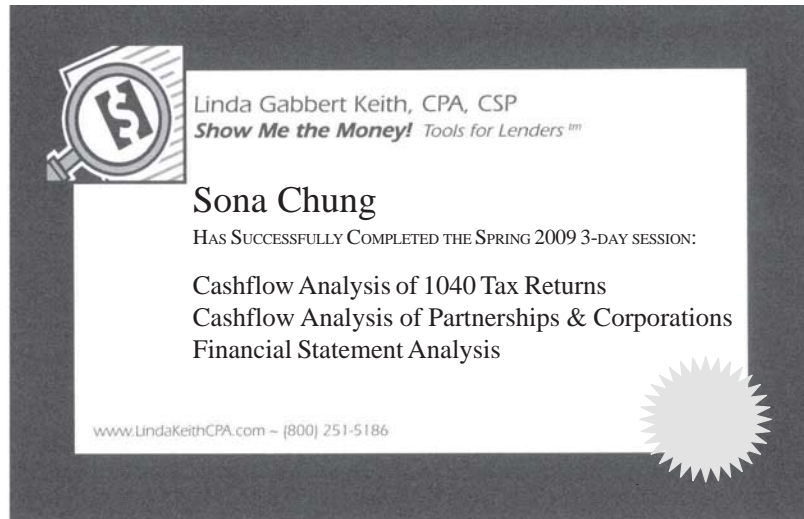
**800-251-5186**

[Linda@LindaKeithCPA.com](mailto:Linda@LindaKeithCPA.com)

Sign up for our Lenders Q&A Ezine at [www.LindaKeithCPA.com](http://www.LindaKeithCPA.com)

*"Lenders Q&A has been very useful to me and my co-worker. I look forward to each edition."*

**Kimberly Rice, Commercial Real Estate Department, Washington First International Bank**



Certificates are sent to the participant's manager along with a sample 'Lender's Q&A' e-Newsletter that has the next program dates on it.

The starburst on the lower right actually represents a gold foil seal embossed with my tagline...Better Decisions by the numbers.

The certificate reminds the manager of the accomplishment and they get to present it to the employee.

It starts to create a relationship between me and the decision-maker.

I often include a hand-written post-it-note with a personal note.

If they have sent a lot of people to open-enrollment programs, I may remind them that with as few as 10 attendees, the in-house sessions may be more cost-effective and can be customized to their needs.

**My Plan:**

**With whom do I want to build the relationship?**

**And what are some ideas to extend the relationship beyond the seminar day?**

**Who #1:**

\_\_\_\_\_

**How:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Who #2:**

\_\_\_\_\_

**How:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Notes:**

## HOW to get what you want.

What is your goal? If it is making money from the series, then following these ideas and the ideas you'll find in the other resources is a great start.

Is it to develop more in-house training, speaking, coaching or consulting? BOR sales?

### **How will you promote in-house training, consulting, coaching, product sales or your latest book through your public seminar process?**

Your IDEAS...

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More IDEAS...

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#### **Linda's goals:**

- Promote upcoming public series
- Develop referral sources (participants and managers) for speaking & training
- Book in-house training
- Develop relationship with the attendee, the manager and the company for future mutual benefit.

#### **Linda's choices:**

- Flyer includes info on in-house, local and shared options
- Mention in-house examples when appropriate
- Manuals are extensive and have contact info on them
- Give each attendee a very cool ruler/calculator that has my website on it and a catchy tagline
- Though lunch is on their own, I eat with them.
- We play legos in class
- Personal relevant stories build the connection.
- Email after the program provides useful info and includes how to set up a local or shared program
- Send the certificate to the manager to develop the relationship with her/him.

NOTES:

#### **My Plan:**

What do I want to get out of the public programs?

How will I be sure to get it?

How will I be or become top of mind when they would benefit from my other services or might be asked for a referral?

## **MY PLAN**

**My topic/title:**

**My compelling reasons:**

**My target attendees:**

**These cities:**

**These days and/or times of the year:**

**These types of hotels:**

**Source of marketing list:**

**Marketing methods:**

Direct postal mail

Fax

Ezine

Articles in publications they read

Association and local presentations

Other: \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_

**I will accomplish this by:**

Doing it myself

Adding it to my current staff's duties

Hiring staff

Outsourcing

**I will develop continuing relationships with referral sources, target companies and attendees by:**

**I need to do more research on:**

**My unanswered questions are:**

# The rubber hits the road!

You have spent a lot of time considering the reasons to launch, continue or expand your offering of self-sponsored open-enrollment programs.

## Does promoting and producing self-sponsored open-enrollment programs seem like a good addition to your mix of business offerings?

NO...I think the costs and/or hassles outweigh the benefits for me at this time.

YES...I am on it! I'll schedule time to pursue this in the next \_\_\_\_ weeks.

### If you answered NO...congratulations!

You have just spent a small amount of money and time making an informed decision. NSA has just saved you a bundle of money and huge amounts of time compared to giving it a try and then finding out it did not meet your needs. And you can quit wondering if you have made a mistake by not seriously considering this avenue for revenue generation and market exposure.

### If you answered YES...congratulations!

With the information in these handouts and the resources Linda has recommended, NSA has just saved you a bundle of money and huge amounts of time compared to the trial-and-error process that many self-sponsoring seminar providers go through to attain success.

Next step, commit to a goal.

I will schedule \_\_\_\_ hours in the next \_\_\_\_\_ (days, weeks, months) to review this plan carefully and develop a to do list for the research necessary to make a final decision.

If I decide to proceed, I plan to launch my (next) public seminar series in \_\_\_\_\_ (month) \_\_\_\_\_ (year).

List three people who are also currently offering or considering/planning to offer public seminars and are in your chapter, your geographic area or would like to create a distance-support group. (Look around, they may be right next to you!) Then use this handout as a template to work together for mutual benefit. Their name and contact info:

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