

Preworkshop checklist

Important items

1. Advertising – most important as you can't hold a workshop without attendees. Determine how you will fill seats
2. Commit to 3 workshops. I had some blind luck on the first couple but it wasn't until the 3rd set of workshops that things all came together and I commanded the room.
3. Accessible meeting room with space for a wheelchair/walker. Test it out yourself!
4. Sound system and microphone/headset. (You think you talk loud, but it isn't loud enough.)
5. Indoor and outdoor signage if not VERY obvious.
6. Room not adjoining other areas with loud activities (Karate class, recitals etc.)
7. PowerPoint with large readable font. Less is more and allows larger font.
8. Large screen. 55 or 70 inch TV is not big enough
9. Classroom style seating. Room to have documents and write notes. Two per 6 foot table.
10. Slide clicker to allow movement
11. Handouts, at least an eval sheet, bio and notes paper. People expect to have something in their hand. I include some whitelabel fpPathfinder flow charts and some Horseshmouth tax updates.

12. Backup Laptop – Cheap \$200 Chromebook or similar with the presentation already loaded and ready to switch if necessary.
13. Use a topic you enjoy. I enjoy taxes and estate planning. Social Security is also great, it just isn't one of my strengths.
14. A warm and cold beverage for yourself. In case you get a frog in your throat.
15. Stories for the PowerPoint. Less complexity. More stories.
16. A strong opening (why is this topic crucial at this exact point in time) and emotional close (why you will benefit from a strategy session and why now is better than later)
17. A clear visual of your free follow up process. Attendees set more appointments with me once I started showing a sample binder of what I produce for people. Fancy graphs are fine but in the front you want the educational recommendations so they know it will be something understandable.
18. A sheet explaining what that follow up process looks like (timeline, what documents and info they need, etc.)
19. Most advisors have Q &A. Just avoid having it at the end. Don't have a Q&A slide. When it pops up (even if 25 minutes in) people start loudly sorting their papers as they think it signals I am almost done. Because of this, I now just allow questions throughout. Sometimes I'll say "that's very specific, let's chat after."
20. Sign-in sheet
21. name tags (preprinted is ideal)
22. Water (I have never provided any beverages but water at this point)
23. A way to set appointments at the meeting. I use the eval sheet where they circle a good day of the week and then follow up within 24 hours to set a specific time

Nice to have items (might help set more appointments or save you time/effort)

1. Customized PowerPoint. Some people use AI to create a presentation. I have used Horseshmou Powerpoint as a template and then heavily customized it over time (removing technical slides and adding story slides). Horseshmou also includes handouts. Other options (among many) are FMT Solutions and Broadridge.
2. Customized folder or binder. I found my Vistaprint customized folders to be worth it once I planned to use all 250 of them. Same with pens.
3. Cookies or treats. I use Crumbl Cookie but sometimes no treats at all if I'm too busy. No big change in appointment setting.
4. Practice by hosting a webinar for current clients or your email list. I use zoom so I can hide attendee count. If even one person shows up, it allows me to practice my presentation.
5. Color printing is expensive. Consider online print shops if you have a couple weeks advance notice for shipping. I reduced printing cost by 60% switching to online.
6. Your own speakers, headset, transmitter and a cable bag for all of those random cables and extension power strips. A pain to haul but I don't have to mess with settings to dial it in like on-site systems. I now refuse to use anything else. Attendees comment on their eval how much they like it.
7. Expensive suit. Once I forgot my suit as I was setting up the venue in my business casual clothes. Did not impact appointment setting but I still prefer a suit.
8. An office. I met prospects at a shared workspace conference room and at their homes. An office is much more convenient but

the number of prospects who preferred home visits was surprising. (They considered it a positive.)

9. Calendly link for ease of scheduling process.
10. Small Bluetooth speakers with light music before starting. Avoids the awkward silence and more people end up chatting.

Optional (Not required for success)

1. Note board to for attendees to grab a Post-It note on the way out with a time scheduled on it
2. CFP or other designations. Rarely been asked about it.
3. Experience. I've been asked maybe four times about my length of service. Also, most attendee questions are somewhat basic so you don't need years of experience under your belt.
4. Professional level public speaking ability. I'm introverted and had tremendous stage fright as recently as three years ago. Shaking and voice tremors. You can overcome that with some simple changes. Seriously, it becomes fun. I wish I could hold them twice a week.
5. An assistant at the workshop is great to reduce workload but absolutely not necessary for success. My best workshop result was from one I was solo
6. Another advisor or professional to assist or answer questions. I prefer not to have anyone else take the spotlight. It is not necessary to have an Attorney for Estate Planning or a CPA for Taxes in Retirement.
7. Steak dinners. Some love them but I prefer education vs the logistics of a menu. Many annuities are pitched this way and I feel it would be hard to refocus attendees.

8. Confidence that you have everything polished. I was only confident after I jumped in and hosted a couple workshops. It's more important to get experience than more training.

Learn from my mistakes

1. The hard of hearing and poor eyesight attendees will often sit in the back.
2. People start shifting nervously if you begin late or end late. Always begin exactly on time. No "let's just wait a couple more minutes for late arrivals." End EARLY by at least a few minutes.
3. Attendees will arrive up to an hour early. You need to have everything ready by then.
4. Venues can change their tech without notification. Set that up first to have time to troubleshoot. Ask who is in charge of tech issues if something happens during the workshop.