

Seminar Best Practices: Careful Thought, Attention to Details Make for Successful Events

If you've ever planned a seminar or conference for clients or prospects, or any other firm function, you know how critical the details can be. Good event planners make it look easy. But the key to hosting a successful event, they say, is a lot of thought and follow-up.

One of the first steps, say experienced planners, is to identify each task and assign it to someone—you, a reliable staff member or perhaps several staff members—to make sure it gets done, and done only once.

Don't leave anything to chance: Figure out each step, from who is going to handle working with the venue's staff to who will design communications materials to who is responsible for registration. Detail tasks in a chart showing the deadline for each one and the staff person responsible for meeting it.

And designate one person—likely yourself—to oversee it all. Make sure there is someone who can answer any question, from who is invited to how the room will be set up to which firm representative will give opening and closing remarks.

"Your chance of appearing disorganized at the event is greater if you don't have a person in charge," says **Jean Caragher**, president of **Capstone Marketing**, based in Chesapeake, Va.

Start with a purpose

When planning the event, set a clear purpose, suggests **Marla Bace**, director of firm-wide marketing at **J.H. Cohn**, headquartered in Roseland, N.J. At the Association for Accounting Market-

ing summit in June, she and **Jessica Levin**, director of marketing for business investigation services at J.H. Cohn, offered tips to holding a successful event, and they spoke with *CPA Practice Management Forum* in follow-up interviews. The purpose might be generating business, educating clients, networking or branding. The important thing, Bace says, is to know exactly what it is from the outset.

"Everything else you do, make sure you are meeting your objectives," she advises.

The A-list

Think carefully about your invitation list, Caragher recommends "That has to be very focused with up-to-date information. A lot of people when planning seminars go for big numbers. They feel they have to have 50 or 100 people or it's not a success. They feel it's more exciting to fill a big room full of people."

But a small event with 15 or 20 good prospects might be more effective.

"When you've got the room full of a lot of people, it's very hard to talk to and follow up with them," Caragher explains. "If you've got 15 or 20, you could literally shake hands and talk to everyone that's there."

Offer a topic invitees will find interesting. How do you know what they want? Ask.

"If your firm does more than one event for this particular target group, that's a great question to ask on your evaluation form," Caragher suggests. "You could have the best list in the world, but

if you're not offering anything of interest on the program, that's not going to get them in the room."

Some seminar planners conduct very informal focus groups to determine if a topic is a good one, and Bace suggests forming a program committee, even if it consists of just one or two of the firm's partners: If you get partners involved, you achieve partner buy-in and are more likely to present content that your target audience wants.

Make a date

When choosing the date, consider factors such as religious holidays, Levin notes. Offering an example, she says she once planned a conference in March and didn't account for the fact that it fell on Ash Wednesday; the venue ran out of vegetarian meals.

The Internet provides an easy way to identify potential conflict dates. "If you run some searches, you can find a number of calendars that provide a list of religious holidays," Levin says. "The other thing is to check the local schools calendar. If it's a long weekend because of a teacher's conference, people may be going away for the weekend."

Consider industry dates, such as April 15 or dates of annual tradeshow or conventions, Bace adds. Know your audience and what events they may already be planning to attend.

Caragher agrees. "If you are trying to attract manufacturers to a seminar and there's a big industry event for that group that day, obviously that's going to be a bad day."