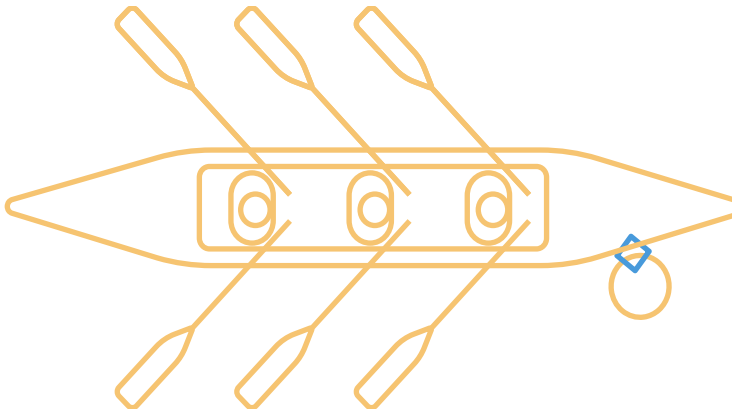




# Host Events that Create High Impact Experiences

Use this guide to better understand the importance of hosting in-person and online events to build credibility and engage with your audience.



Hosting events gives prospective and existing clients the opportunity to get to know your company and relate to your brand through personalized teaching and messaging. In this guide, you'll learn about the importance of hosting events, how you should prepare for them and the necessary steps to take after the event to optimize their effect.

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# Why Events Are Important

Both clients and prospects want the same thing. They want to know that they are making wise decisions for their future. Events are efficient in their ability to be effective for both clients and prospects at the same time. A good event with quality information conveys your desire to educate and inform the attendees about their situations or what's going on around them. This builds confidence – in themselves and your firm, which helps you retain existing clients and attract new ones.

Perhaps you're looking to boost your industry credibility, care for clients, convert some leads to clients or want to establish network connections with industry partners. In-person or online events offer the opportunity for potential customers to get to know and relate to your brand through exposure to like-minded people, personalized teaching, seminars or information. Events can generate positive exposure for your business, bring together clients and prospects and relay the opportunity for your team to network with target customers.



## Connect2Investors Events

Turnkey quarterly events, the emails and everything you need to host an amazing event for your clients and prospects.



# Steps for Creating Your Own Events

Here are a few best practices for getting started on your event. Businesses that host events are expected to adhere to a certain level of production quality. These best practices will help ensure that your business hosts a well-organized event that represents your brand well.

- Decide on your platform: Will it be in person, online or a combination?
- Consider partnering with another company: Will you have another speaker from a different company that your audience might appreciate?
- Decide on a location/medium: Where will you host the in-person event, and/or what platform will you use to share your online event?
- Choose your theme and content: What is the focus and goal of your event?
- Understand what your audience wants to gain from your event: Consider your audience and your original goals, and make sure the design of your event effectively targets both your audience and your desired outcomes.
- Create a campaign: What will your next steps be and what will your audience's next steps be?
- Make sure that all content to be presented is branded: Never miss an opportunity to gain exposure for your business.
- Update your social media: Consider developing a hashtag, event page and/or other special social media plan to promote your event.

The success of any event lies in the details. Thinking through and preparing for every aspect of your event, especially from the standpoint of the user experience, will help you avoid oversights and errors.

# Get the Maximum Benefits from Your Events

Whether you decide to host an in-person event, online event or a combination event that is both in-person and shared online, there are a number of benefits. Here are some of the ways your business could benefit from hosting events.

- **Network:** Events are huge opportunities for your employees to network with potential or existing customers. Direct interactions lead to more personable network connections that can be hugely beneficial for your business and customer relations. This can be challenging with online events, but there are still opportunities to network through message boards and online forums.
- **Build, connect with and understand your target audience:** Going a step further than the simple benefit of networking, events also enable your team to build further or new relationships with your target audience. By meeting them directly, you can converse with them about their needs and wants, gain a better understanding of the same and learn how to more effectively serve and market to them in the future.
- **Boost conversion:** Events, either in-person or online, are great places to market your products and/or services since those in attendance already demonstrate a vested interest just by showing up. Make sure to invite prospects so they can learn more about you and the company and be more likely to convert to a lead. These personable, direct marketing opportunities can significantly boost conversion rates for your business.
- **Develop personalized content for your brand/event:** Events enable your business to really come forward with its branded content. Branded content allows your business to truly relate to consumers and create products and/or services that are unique to your brand and that are geared toward your target audience.
- **Build industry credibility:** Usually, events are hosted by established companies that have trusted products and services to back up their approaches and provide credibility for an event. Hosting an event helps establish credibility and brand awareness for your business and can improve your business' overall reputation in the industry.
- **Introduce new products and/or services:** Events are a great place to introduce innovative, new or unique products or services from your business. This enables your audience to link these services to your brand and get excited about other upcoming events and launches. Consider pairing these events with social media campaigns for even greater exposure.



## MarketingCentral Events Guide

Use the MarketingCentral Events Guide to help you plan, manage and promote your next prospective and existing client event.

[View Guide >](#)

# Generating Exposure for Your Events

In-person events are a great way to engage with your local potential audience. Although the event is in person, promoting your event via social media or by other means will help you gain exposure among a wider target audience.

Consider incorporating one or more of the following channels or mediums in your event strategies:

- Social media posts or campaigns
- Email blasts or campaigns
- A rented out space or designated office space for a smaller event
- Encourage people to invite and bring their friends or co-workers
- PowerPoint slides or other presentation aids

Online events, such as webinars, provide the opportunity for your business to engage with an even wider audience, regardless of geographic location. For these events, you can also incorporate the use of various mediums to help get the most exposure out of your event:

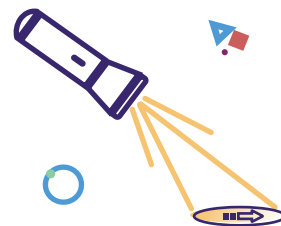
- Social media posts or campaigns
- Email blasts or campaigns
- PowerPoint slides or other presentation aids
- Streaming services and access to other digital content

While it may take a little more planning and technical coordination, hosting an event that is in-person but also shared online is another way to maximize the exposure for your business while maintaining personal and direct contact with your audience. For these events you can also incorporate some or all of the strategies listed above.

## Measuring Goals for Your Events

Just as you set goals for your business, you should identify specific goals for your event to help you better focus your efforts and maximize your outcomes. Consider which of these simple goals for hosting an event might be relevant to the needs of your business.

- **Boost conversion rates:** Track the number of leads that you get to sign up for the event, the new business meetings set up and any new client engagements that result from it. Then work to improve each event.
- **Generate niche exposure:** Success in an event where you are trying to widen into a niche would be a high number of new prospects who attended that are in that niche.
- **Drive wide brand awareness:** Brand awareness is hard to track but exposure to new faces is key. Watch your attendees for new faces and check your social media for shares. This indicates you are reaching more people.
- **Increase revenue:** Hosting an event that focuses on adoption or conversion of products should track whether you saw a lift in the product you were promoting.
- **Inform clients about your brand/products/services:** Here you are trying to gain trust, so look for new retention in current clients or new clients altogether.
- **Book appointments:** The more scheduled meetings and requested appointments, the more qualified leads you have which can then lead to signing more clients.



## Use Email to Promote Your Event

Email is the top promotional channel for webinars. Up to 57% of registrations come from that channel, and the conversion rate is 27% higher.<sup>1</sup>

<sup>1</sup><https://blog.hubspot.com/marketing/webinar-stats>

# Keep Using The Events

Even after an event is over, your work is just beginning, so make sure to finish what you started. You've generated significant interest in your company and services, you're in contact with high-value leads, so what should your next steps be?

## Plan Your Next Steps

After an event, your audience will likely be excited about the message they heard and be ready to take the next step in the sales journey. Make the most of their excitement by planning your next steps ahead of time. Your next steps might include sending a follow-up email and contacting the people who attended your event to continue nurturing them along as they become clients.

## Give Your Audience Next Steps

The people who attended your event are now potential high-value leads, but they need next steps to go from leads to clients. Before the event ends, have audience next steps in mind, so they can follow through while your message is still fresh in their mind. Next steps might include scheduling time with you or filling out a form on your website.

## Post Your Events Online

One of the great things about events is that you can record your message and continue using it for as long as you'd like. Create a page on your website where the recording can stay and keep spreading your message. You can also use the recording as a resource for anyone who is interested in learning about that specific topic. Uploading your video can help increase the longevity and reach of your event.

**53% of marketers say webinars are the top-of-the-funnel format that generates the most high-quality leads.<sup>2</sup>**

# Events Compliance Safeguards

Staying compliant is vital to protect you and your company's reputations. Take care to avoid language on your website that sounds promissory or misleading. Use clear, accessible language on every page. These quick steps can help you ensure you're following compliance guidelines and protecting your business.

## 5 Simple Steps to Safeguard Your Firm

1. Learn about the risks: talk with your legal or compliance department. Review Cetera's content policies and take the training courses in the SmartWorks Learning Center.
2. Get clear guidelines on how and where you should use specific language. What kind of language do you need to avoid? What disclosures are needed and where should they appear?
3. Establish guidelines for reviewing materials and set up approval hierarchies. Make sure your whole team is aware of these protocols.
4. Verify your digital marketing content has all the required disclosures.
5. Whether it's you personally, your compliance officer or a trusted vendor, make sure that someone is watching for errors and the correct changes are made before the content goes public.

<sup>2</sup><https://blog.hubspot.com/marketing/webinar-stats>

# Growth360°

## Events Overview



In-person and online events can generate positive exposure for a business and relay the opportunity for your team to network with target clients. MarketingCentral, Cetera's digital marketing platform, can help support your hosting efforts and make your events process easier.

Use the stages below to assess where you are today and find new opportunities for growth.

### Visible

Success at the first level is about making sure you have a basic plan in place for your event. You should have a clear picture of where you're hosting the event, who will speak and what the speaker is presenting on. Having a consistent event schedule will help drive growth over time. Leverage the Connect2Investors – In the Room events and materials.

### Active

Success at the second level is about connecting with your target audience and driving success. You should have goals for the event and understand the goals of your attendees. You should be promoting with email and social media. It's also during this stage that you might start advertising the event online. At the end of your event, check the numbers and see how you performed against your goals.

### Optimized

The third level is about maximizing outcomes and working toward reaching your identified goals. Part of maximizing the benefits of an event is having next steps for yourself and event attendees. Through posting the message online after the event, you can get more exposure and help more people hear your message. At this level you are likely creating different events to target different niche groups or promoting different products.












# MarketingCentral by Cetera

Build a strategy for growth with MarketingCentral, a powerful suite of tools built exclusively for you by the Cetera Marketing team. MarketingCentral is a comprehensive multi-channel platform with pre-approved email templates, social media content, downloadable event kits, presentations and so much more that you can fully customize to meet your business and client needs. Take the guesswork out of marketing and focus on growing your business.



Learn more at <https://fmgsuite.com/marketingcentral/experience/cetera-resources/>

 <b>QuickStart Guide</b> Get up and running with this step-by-step guide to MarketingCentral.	 <b>Interactive Webinars</b> Register for an interactive webinar to learn more about the MarketingCentral tools and get assistance with any questions.	 <b>Marketing Strategy &amp; Best Practices</b> Put together a solid client and prospect outreach strategy designed to get results with the help of this straightforward guide.
 <b>MarketingCentral Automations</b> Explore opportunities to automate marketing communications across email, social and print.	 <b>Growth Guides</b> Drive leads and increase prospect conversion rate with these Client Prospecting and Conversion Guides.	 <b>Events Guide</b> Leverage MarketingCentral and these tips to plan, manage and promote your next client or prospect event.
 <b>2021 Marketing Calendar Template</b> Plan the next year of marketing content and strategy with this calendar template.	 <b>Required Record Retention</b> MarketingCentral is an approved record retention tool.	 <b>Using MarketingCentral as a Team</b> Use these tips to personalize a profile if you are using MarketingCentral as an ensemble team or program.

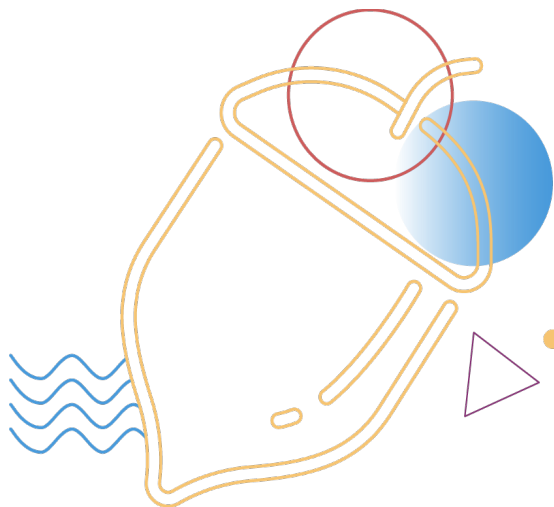
## Additional Events Resources

[Marketing Strategy & Best Practices](#)

[MarketingCentral Events Guide](#)

[Social Media Best Practices](#)

[MarketingCentral Automations](#)



'Cetera Financial Group' refers to the network of independent retail firms encompassing, among others, Cetera Advisors LLC, Cetera Advisor Networks LLC, Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors), Cetera Financial Specialists LLC, and First Allied Securities, Inc. All firms are members FINRA/SIPC. Located at 200 N. Pacific Coast Highway, Suite 1200, El Segundo, CA 90245-5670. Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.