



# Best Practices

## Increasing Appointments From Webinars

Webinars are a highly effective lead generation tool that can help power growth. According to a 2019 study by business-to-business (B2B) content and demand marketing platform BrightTalk, 91% of participating B2B marketers cited webinars as their top educational format. Regardless of circumstance, it is important to get the most webinars and we think the following tips will help you do just that.

### 1. SET THE STAGE

The guests may be attending virtually, but that's no reason not to greet your attendees promptly and professionally. Just as you would if you were at a live event, greet webinar attendees in your virtual lobby with a "Welcome" sign, information about the webinar they are attending, or other media while they wait. Don't miss an opportunity to connect with your audience and make a good first impression.

Small details make a difference to your audience and help solidify your reputation as a leader in the industry. Consider adding an image of the speaker, a company logo or mission statement, soothing background music, or a brief looping video about your company so attendees can learn something about you before the presentation begins.

Be early and start interacting! Spend the first few minutes asking questions via polls, getting them engaged and part of webinar early on. Start building relationship before the presentation begins, and they'll be more likely to enjoy the presentation, trust your advice, and schedule an appointment.

## 2. BE HELPFUL

The most important aspect of a webinar is to ensure the attendees benefit from the experience. While the goal of the webinar is to generate appointments, in order to be successful, you have to sell yourself, your experience, and your company to the audience.

People are attending your webinar to be educated on the topics you're covering. They're seeking solutions to potential or existing problems, and ways to avoid future mistakes. Tell your audience why the presentation you're about to give is worth their time. Offer a brief synopsis of what you are going to cover and how it will benefit them. Make sure to audience knows why the presentation you're about to give is worth their time. If you don't, they may not stick around to find out!

There are many ways to be helpful and include your audience during the presentation, including:

**Q&A Segment** Adding Q&As allow your audience to interact with you, keeps them interested and helps you know what your prospect's need are.

**Poll for Participants** By allowing participants see results during the presentation helps them become part of the discussion.

**Death by PowerPoint!** Content is important, but text-heavy slides are a distraction. Use key terms instead that help support your message.

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## 3. LOCALIZE YOURSELF

Your audience wants to work with a local advisor. Make it clear where your business is based at the beginning of the webinar to avoid any confusion and unnecessary inquiries about your location.

Build a relationship with your audience – they are part of your community! Tell them where you live and where your office is located. Share community activities you may be involved in or places you volunteer at. Why do you and your family love living here? Where do you spend your weekends biking, eating out, or hanging with friends? Make your experience personal and connect to your audience on a casual level.

Which brings us to our next tip...

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## 4. TELL YOUR STORY

For your attendees, you need to be more than just a financial advisor. In order for attendees to want to do business with you, you need to build a foundation of trust and capability. Display your expertise in your field, and provide them with examples and guidance on how to save the right amount of money to allow them to retire, send their kids to college, or travel the world.

The people signing up for your webinar are not sure if they have saved enough, or are currently saving enough, to retire. They have sought you out because you possess knowledge they do not have and they are looking for reassurance.

Explain to webinar attendees how – and why – you got into the financial services industry. What inspired you to join an industry focused on helping others prepare for the inevitable ups and downs? Share any experiences you have that will give them a snapshot of who you are not just as an advisor, but a person.

## 5. FOCUS ON CORE TOPICS

Attendees have a limited attention span, so pick four or five key points to feature in your webinar. Choosing a highly specific content area allows you to go into greater detail, providing your audience with highly relevant information and shares your depth of knowledge and experience. Trying to cover too much in one webinar can wear out your audience, so choose wisely.

Once you've chosen your key points, be sure to outline them before diving into the presentation so the audience knows what you'll be covering and what to expect. Then address them in that order. Why? Because some attendees may have joined for information on just one subject, while others will be interested in multiple topics you're discussing and will stay until you cover them. Setting up expectations ahead of time can help ensure they stay focused and interested.

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## 6. USE CALL-TO-ACTION BANNERS

Don't miss the opportunity to learn more about your audience and help move them toward committing. Unlike a face-to-face event, you can incorporate clickable, rotating banner ads into a webinar presentation. Choose one call-to-action, such as scheduling a complimentary one-to-one consultation, offering a gift card (where permitted) if the person meets with you, or direct them to more information about your services.

What works best? It depends on what you are looking for in the webinar and what connects with your audience. Some clients who offer gift cards convert more prospects than those who don't. Trying a variety of offers might help you determine what's best for your business.

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## 7. SHARE RELEVANT EXAMPLES

We can't stress this enough: know your audience! Be able to explain that you understand and can help them with their pain points. What are their goals? What challenges or problems are they facing?

One key reason people shy away from making an appointment with an advisor following a webinar is that they don't feel they have enough assets to be professionally managed. Provide examples that webinar attendees can relate to, and how you have helped other individuals in their situation.

Americans are living longer than ever before – show them how you can help them save enough for a comfortable retirement. Give webinar attendees some examples they can relate to.

Share examples – both of successful situations where people benefitted from your advice, and situations where an individual suffered a financial loss – might encourage your audience to act. Read your audience, listen to their feedback, and tell them a story they can identify with.

## 8. MAKE THE APPOINTMENT

Some advisors get lost in the presentation and forget their end goal. Put a slide between the 20-minute mark and the end of your webinar, to recap what you've shared with your attendees. Suggest to them that they may want to make a phone, virtual or in-person appointments with you to discuss their needs in more detail.

Your CTA, whether a banner, an image, or a clickable link, should be clearly displayed and direct them how to act. Make it as easy and convenient as possible for them to request more information from you, and they will be more likely to act.

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## 9. FINISH STRONG, WITH OPTIONS

Most of us know at least one person who procrastinated and missed the chance to accomplish something meaningful, fulfill a dream, or achieve a desired goal. Because of continuing market uncertainty, those who are on the fence about their finances are more likely to want to review their assets or establish a savings plan, if they don't have one.

Have questions and answers ready for your Q&A and be ready to provide helpful and informative guidance. When it's time to sign off, be gracious and thankful to your audience, and ensure they have everything they need to take the next step.

And don't forget – the end of your webinar is not the end of your contact with them!

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## 10. FOLLOW UP

The end of the webinar is just another opportunity to you to reconnect with your audience. Make sure to touch base with your guests after the webinar to ask about any additional questions or needs they might have. Offer to add them to your newsletter, invite them to follow you on social platforms, or follow up with a survey about their experience. This feedback can help you determine the best next steps for them – and your business.

**These are trying times for everyone. Maximize the value of your virtual events not only during this period of uncertainty, but after in-person seminars become an option once again. When done correctly, webinars are an extension of your client acquisition efforts and will help you grow your business.**

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