

# Want to Win Referrals and Grow Your Fees?

Running seminars has always been the domain of pro-active and successful accounting firms. Nothing beats face to face presentations for explaining complex issues to clients or launching a new service offering. Despite the fact that seminars are proven to help accountants build their brand, attract referrals and generate more fees, less than 5% of Victorian accounting firms host client seminars. As Professor Julius Sumner Miller would ask, "Why is it so?"

The most common response is, "I know I should run seminars but I don't have the time". Accountants balk at the seminar preparatory time. You need to decide on a topic, develop the PowerPoint slide show, source a suitable venue, write and distribute the invitation letters and develop handout material. Ironically, these firms also complain that their referrals and growth rate have slowed to a crawl. They are leaking clients and think the quick-fix solution is to buy fees. This is a band aid solution and the scarcity of fees on the market means you pay premium prices if you are lucky enough to source a vendor. **My advice is simple, before you invest hundreds of thousands of dollars in someone else's practice, invest a few hundred dollars in your own practice and run a client seminar.**

There are other excuses on offer and at the top of the list is a fear of public speaking. A lot of accountants would rather be in a box than on a stage in front of their clients. We are trained technicians and our personality types generally avoid the spotlight. The truth is, you don't need to be an orator like Barack Obama because your clients already trust you and while seminar content is important, the delivery is the way you keep your audience engaged. It is a skill and practice makes perfect!

The next question is what topic? It has to be educational and not a sales pitch so most firms start with topics that centre on tax strategies including negative gearing of property and self-managed superannuation. They are knowledgeable in these areas and they both offer a wealth creation edge that appeals to clients of all ages. They highlight the broad range of services you offer beyond compliance and can potentially generate more revenue for the practice if clients buy a rental property, take out a loan, increase their risk insurances or establish a SMSF.

## If you're time poor and suffer from stage fright, Systemised Seminars offer a solution.

Kevin Bolt ran his own accounting and Financial Planning practice for more than 20 years in Melbourne and established Systemised Seminars in 2012. They work exclusively with accountants to deliver client seminars and offer what could best be described as a turn key solution. Kevin attributes a lot of the growth in his accounting practice to running regular and relevant client seminars. "Clients were encouraged to bring friends and business colleagues to the seminars and we consistently picked up new clients from the events. These new clients often told us that their accountant would never run these types of seminars so we knew it was a point of difference compared to the reactive firms."

What's unique about Systemised Seminars is their automated process. Kevin acknowledges the fact that most partners and principals are busy running their practice so his group not only provide experienced speakers to deliver your seminar, they also supply the suite of marketing materials and data projection equipment. Basically all you need to do is identify the clients to invite and send out the invitation letter and follow the system of follow up emails. It is almost a seminar 'in a box' because everything is included in the 'marketing kit'. According to Kevin, "Our aim is to pull a crowd and deliver a polished, professional presentation that will exceed clients' expectations. The tools are designed to minimise your time but maximise attendances and your return on investment."



The feedback from the accountants and their clients has been overwhelmingly positive and Kevin is adding more new topics to the menu of seminars. The benefits of engaging Systemised Seminars to run your next client seminar include:

- A turn key approach - everything is included from the presenter to the client invitation letters, data projection equipment, chain of email templates, flyer, handouts and feedback sheets
- A professional presentation so your clients get the 'wow' factor
- Educated clients make informed decisions and are more likely to refer their friends and colleagues
- Seminars help you 'build a fence' around your existing clients
- They can be highly profitable if you want to promote a product or service
- They position the firm as an expert and differentiate you from the pack
- More fees translate to more profit and an increase in the value of your practice

According to Melbourne accountant, Russell Alexander, "The process is heavily automated and they even sourced the venue for me. All I had to do was prepare a list of clients and prospects to invite and they even printed the letters on my behalf. We then sent their follow up emails and sat back and watched the registrations grow on the on-line booking system. It was a fantastic presentation and they missed nothing including the fact Kevin gave me a script to help introduce the speaker. Even the follow up de-brief meeting was useful to analyse the feedback forms and decide on any action that needs to be taken. Our clients have rung and emailed their thank you messages and we have already booked our next seminar date."

As part of my due diligence I attended Russell's recent seminar Negative Gearing – The Cold Hard Facts and found it was pitched at the right level and the 75 minute session ran like clockwork. Kevin is a passionate public speaker and the seminar content also dovetails perfectly into the next seminar, Thinking of Starting Your Own Self Managed Superannuation Fund.

I'm delighted to give Systemised Seminars a glowing testimonial as they have the experience, systems and marketing tools to help pro-active accounting firms. If you're looking to get client seminars back on your marketing agenda call Kevin Bolt today on 0418 395 343 or visit [www.sysem.com.au](http://www.sysem.com.au)

**THE 5 STEPS TO RUNNING A SUCCESSFUL CLIENT SEMINAR**

1. **Message** - Decide why you are running the seminar and what you want to achieve. Set your goals.
2. **Content** - Decide on the topic and ensure the content is relevant, clear and follows a logical sequence.
3. **Identifying** - An important task is identifying your target audience to staff and personally to your clients. This is usually done by contacting your clients and contacts while the registration process needs to go on.
4. **Logistics** - On the day you need to be prepared for the night to run smoothly. You should have a checklist and staff for reasons of their choice.
5. **Endgame** - Follow up the attendees and non-attendees, a vital to ensure you achieve your goals. Analyse all the feedback that you get and take action.

**Our mission is to provide a turnkey seamless seminar based on our proven system.**

**What you do**

- Decide on topic and venue
- Prepare a list of clients you want to invite
- Delegate a person in your firm to liaise with on-site live technicians to learn
- What we do
- Customise PowerPoint presentation with your firm's logo
- Liaise with the venue to ensure appropriate technical requirements available
- Set up the automated booking system
- Draft and verify your email to the seminar to get your presentation and delegate responsibilities
- Supply printed copies for the seminar
- Prepare templates for you to mail merge, print and mail personalised 'welcome' invitations to your clients
- Provide marketing content for inclusion on your website and client messages
- Follow up all clients via phone, email and or SMS
- Provide all seminar packs including handouts, forms and presentation
- Prepare script for presentation to copywrite seminar and presentation
- Prepare email messages of 'welcome' for attendees and 'sorry you missed it' for no shows
- Have your own digital, online feedback forms and decide on follow-up action

**Why Systemised Seminars?**

You can be assured that we have the expertise in design, layout and printing, which your seminar packs and lists will differentiate you from all other seminars. Our seminars are designed to help you have the quality results you desire and feel good about the results you achieved them.

**Show me the Money!**

Accountants have had to increase their marketing fees as they have the experience, systems and marketing tools to help pro-active accounting firms. If you're looking to get client seminars back on your marketing agenda call Kevin Bolt today on 0418 395 343 or visit [www.sysem.com.au](http://www.sysem.com.au)

**Systemised SEMINARS**  
Solutions For Proactive Accountants

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