



## Seminars and events

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A seminar is a personal communication medium in an environment you control. Seminars are an effective and affordable way to deliver messages about the benefits of your products and services to a targeted audience in a concentrated amount of time. Seminars generally show and tell people about new trends, give industry insights, and sometimes demonstrate how to use new products or get more from the products they already use. They usually avoid “selling” the audience. Instead, seminars act as a door opener, putting you in touch with people who have a need for your offerings and creating opportunities for future contact. When you conduct a successful seminar, everybody wins. Customers and prospects get information they need; you get direct contact with them, as well as leads that help drive your sales process.

As part of the comprehensive set of marketing tools offered by IBM PartnerWorld® for Software, this document reflects IBM’s strong commitment to helping you understand, plan for and conduct seminars and events, preparing you to take advantage of the opportunities in this next generation of e-business.

#### Types of seminars

There are three standard ways to deliver your seminar content to your prospects and customers:

**Traditional seminars:** A one-to-many, in-person presentation, traditional seminars can be held at your facility, a hotel conference center or another appropriate location. With traditional seminars, a speaker or series of speakers deliver information through stand-up presentations and roundtable discussions. The high level of personal interaction is a key benefit of the traditional seminar.

**e-seminars:** An e-seminar is a live, Web-based, interactive seminar that helps you reach potential customers and even internal sales teams online. Convenient and affordable, e-seminars allow you to evaluate your audience’s interest through live questions and answers. This provides the experience of a traditional, in-person seminar without requiring attendees to leave their office.

**Teleseminars:** Teleseminars are delivered remotely, over the telephone. All parties dial into a pre-arranged teleconference to participate in this type of seminar. This is a cost-effective, less formal approach to presenting information; it may be appropriate for some of your audiences (existing customers, for example), but is not the best choice for providing in-depth information.

The benefits and limitations of the tactics being discussed in this document are illustrated below [Figure 1]:

Seminar Type	Benefits	Limitations
<b>Traditional</b>	Provides "face time" with customers/prospects	Becomes costly when overly elaborate
	Positions organizations/individuals as "thought leaders"	Requires dedicated resource(s) for planning/logistics
	Facilitates CRM and builds recognition/loyalty	Often requires participation from guest speakers / successful customers to generate interest
<b>e-Seminar</b>	Offers cost-effective way to reach large audience	Often excludes technology laggards
	Eliminates geographical/distance/travel limitations	Presents difficulty in evaluating quality of leads
	Drives Web site traffic	Provides no opportunity for face-to-face interaction
<b>Teleseminar</b>	Offers low cost approach to reaching a targeted group	Can be difficult to hold attention of audience
	Requires little time/attention commitment from audience	Offers no opportunity for visual appeal/impact

Figure 1

**Seminars and thought leadership**

One of the best reasons to host a seminar or event is to reinforce your organization as a thought leader in your industry and market. To this end, seminars can take many forms, from full-scale events hosted at a hotel or conference center, to more intimate gatherings at your office. One popular and affordable approach is to host a two-hour evening gathering, inviting others in the industry to discuss the day's pressing challenges and potential solutions. Or, a seminar may be a full-day event that features guest speakers and first-hand accounts on business and technological challenges, successes, and best practices.

**Before you begin**

Before you get started on planning your seminar or event, make sure you have gathered detailed, relevant information about your audience and the best approach for reaching them. The following articles, offered as part of the IBM PartnerWorld Co-Marketing Developing Skill Series, include useful worksheets to help you define and assemble this information.

- Target Audience Planner
- How to Choose the Right Tactic

To access these articles and other marketing skills resources, visit PartnerWorld University at [ibm.com/partnerworld](http://ibm.com/partnerworld).

Think about the best way to reach participants and generate interest. Often, targeting industry-specific audiences is best, since you can tailor your presentations in a way that resonates with the audience by focusing on a specific industry challenge and appropriate solutions.

#### Planning the seminar

No matter which type of seminar you choose to deliver, remember that you must demonstrate value in order to encourage participants to come. This starts in the planning stage. For your existing customers, you can offer value by showing how they can take the next step in e-business leadership using a new strategy, technology or product. For prospective customers, that value might be achieving a competitive advantage, realizing a greater return on investment, or mitigating risk by adopting a new strategy, technology or product. You should tailor your seminar topics according to the value you intend to deliver.

Even the best topics can't overcome a poorly planned seminar, however. Be sure to pay proper attention to the planning and preparation phase [Figure 2]. Where the seminar is held, how it is organized, how you organize and present your information – all of these can make or break its effectiveness. There are several things you can do to ensure that your seminar provides value to both your audience and your business. (For a comprehensive Seminar Planning Checklist, see the Addenda of this article.)

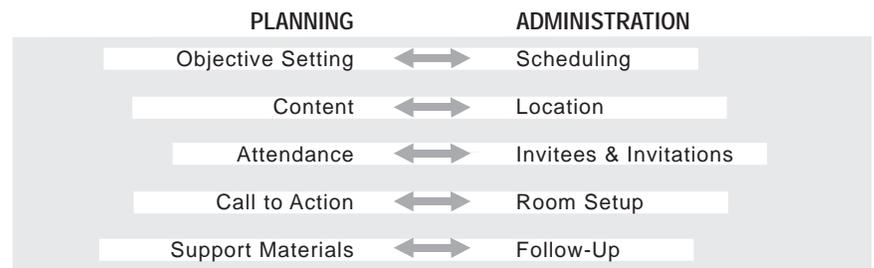


Figure 2

Set clear objectives. As with any marketing program, deciding what you want to accomplish is the first and most important step. Is it to educate? Build relationships with existing customers? Gain qualified leads for new customers? Schedule follow-on meetings? Close deals? Using the Addendum in the *Choosing the Right Tactics* article, define your expectations at the outset so that you can measure results.

Determine content. Everything you deliver through the seminar creates an impression of your company. Because you will have limited time with your audience, you should limit the amount of material that you plan to cover. An outline of your seminar content may look like this:

- Introductions
- Industry trends and business challenges
- Solutions and resources to address these challenges
- Success Stories – customer examples or co-presenters who demonstrate best practices
- Future predictions, what to look for next
- Wrap-up / Call to action / Q&A

You may also want to check with your IBM Regional Manager to see if an IBM subject matter expert is available to speak at your event.

<b>Bringing content to life</b>	
<b>Delivering content:</b>	A variety of audio-visual equipment is available to help you communicate your messages: PC-based presentation tools, slides, video, audio tapes, and overhead projectors. Live product demonstrations are a good way to give participants hands-on interaction with products. Requiring only an Internet connection and telephone, e-seminars offer Web-based delivery of your content and allow you to evaluate the audience's interest through live question-and-answer sessions.
<b>Communicating the message:</b>	A recognized guest speaker adds credibility to your seminar and can also encourage attendance. Featuring customers and users is a good way to provide lively testimony about your business, as they present a credible, third-party perspective based on their own experience and advice.
<b>Involving the audience:</b>	Get your participants involved. Consider round table discussions, breakout groups and question-and-answer periods. Schedule an informal time after the event to allow participants to ask specific questions, get clarification on points of interest and meet with your sales associates.

Figure 3

#### Drive attendance

Consider offering a takeaway in order to drive attendance for the event. The offer must be very compelling and relevant to your audience. The right takeaway offer can mean as much as 300-percent difference in participation. Offers are of two flavors: personal and organizational. An example of an organizational offer is an IBM e-business Executive Assessment, which you may want to offer to highly qualified prospects as a first step in showing how your organization can help.

Personal offerings are often an even better approach. White papers have been tested against personal small gifts, such as golf balls, movie tickets, music CDs, etc. The small personal gifts demonstrated a 2.5 to 5 times better response rate. Therefore, consider including a small personal gift for attendees, but avoid expensive offers that can conflict with corporate gift giving policies.

#### State the call to action

At the end of the seminar, you must provide something attendees can act upon, a “next step.” A strong call to action can help you determine your “A” leads—those interested in moving on to the next step. Whether it’s signing up for a free assessment, turning in a business reply card, or visiting your organization’s Web site to download a white paper, the call to action must be compelling and something participants can act on immediately or shortly after the close of the seminar.

#### Provide support materials

Give your message more lasting meaning by providing a “take-home kit” that reinforces the information you provide during the seminar. Typical materials include:

- A seminar agenda
- Copies of presentations
- Information about the speaker or presenters
- Solution/product/service information, such as brochures or white papers
- Information about your company
- Company contact information/business cards
- A seminar evaluation form

In the kit, you may also want to include a promotional item such as a clipboard, paperweight, or pen with your company's name and telephone number or Web address imprinted. Keep in mind that personalized items require significant lead time to produce. Plan to place your order at least two months before the seminar.

#### Administering the seminar

Whether you are delivering your seminar online, over the phone, or in person, smooth administration of all key parts – timing to invitations to follow-up and measurement — is crucial.

**Scheduling.** Seminars can last an hour or two, or an entire day. Typically, a half-day seminar gives enough time to present information, answer questions, provide demonstrations, serve refreshments and talk with attendees. A typical agenda for a half-day morning session might be:

8:30 - 9:00	Continental breakfast and registration
9:00 - 9:15	Welcome, introduction of seminar goals and speaker or presenter
9:15 - 10:45	Presentation followed by questions and answers
10:45 - 11:45	Product demonstrations and individual discussions with attendees

An afternoon seminar typically begins at 1:00 or 1:30, with refreshments served at the end. For a full day seminar, plan a midday meal, or allow sufficient time for the attendees to get a meal and return to the seminar. You may also want to include two 10-15 minute breaks during the seminar.

An evening seminar is a good alternative, since it can be held at your facility without the distraction of the typical workday. Because evening seminars are held off-hours, however, you should feature a guest speaker of note from your industry or business community to generate interest, and use the opportunity to educate your audience on an important trend or opportunity that links to your organization's solutions.

When delivering an e-seminar or teleseminar, don't exceed two hours. People's time commitments and attention span generally won't absorb information beyond two hours if they are at their own desk. If the content exceeds two hours, consider breaking the seminar into two sessions. Other

scheduling considerations include:

- Consider that you may be dealing with multiple time zones. Use your earliest time zone as the guide when scheduling the start time.
- Avoid Mondays, Fridays and short workweeks.
- Verify that there are no major industry events taking place at the same time.
- Don't schedule the seminar just before or after holidays.

Location. Even if you have an adequate meeting room within your facility, there are advantages to holding your seminar in another location. A meeting room in a conveniently located hotel or convention center is generally a good choice. Or check with your IBM Regional Manager about holding your seminar at a nearby IBM location. It is particularly important to secure the room several months in advance when holding a seminar off site. Some other considerations:

- You will usually need to make a deposit to hold the room.
- Check on cancellation policies. Facilities sometimes require a cancellation fee.
- Check with the meeting facility prior to the seminar if you need to bring in large amounts of equipment, heavy objects or equipment that uses other than standard power.
- Be sure the room is the right size for the number of people you expect.
- Remember to include your company's representatives in the total. A room that is too small is uncomfortable. A room that is too large discourages interaction and makes it look as if your turnout was smaller than expected.
- Provide free or valet parking.

The invitation. When it comes to the invitation, research shows that an attractive invitation or well-written letter can pull 100 percent better response than a poor one. For any invitation, whether delivered by telephone, direct mail, personal courier, or e-mail, the more personalized, creative and informative it is, the better:

- Use the invitee's correct name and title, and put a personalized touch on each piece of the invitation.
- Provide a local telephone number for registration (and make sure it is always answered).
- Instill a sense of urgency by including a "quick response" card, or an offer for a free personal gift if the registration is sent back within the week.
- Send invitations out between four and six weeks before the seminar, with follow-up reminders as the event nears.

To reinforce the invitation and generate awareness of the event, consider supplementing the invitation with a “multi-touch” campaign promoting the seminar, using several communication vehicles:

- **Press Release:** Issue a press release with details of the upcoming event. Highlight the guest speakers, information value of the seminar and what job function/level the seminar is geared to. Don't give the location of the seminar in the release; instead, offer a number to call for registration so unqualified people don't show up at the door unannounced. Post the release on your Web site and distribute to local, regional and even national media if appropriate.
- **Local newspaper advertisement:** Consider running an ad in the local newspaper or business magazine. Plan to run your ad two weeks in a row, starting four weeks prior to the seminar. If your first ad fills the seminar, you can cancel the second insertion and contact interested prospects for your next seminar.
- **Telephone calls:** Use follow-up calls to verify that your invitation was received. This opens the invitation to others in the organization who may be interested. Call about a week after your prospect receives the invitation, and again approximately two weeks prior to the seminar.
- **Reminder calls:** A week prior to the seminar, call the people who have signed up to attend to remind them of the date, time and place and to reconfirm their intention to attend.
- **E-mail:** Use e-mail to confirm registration, send directions to the seminar or provide instructions for logging or dialing in.

**The room.** Room planning is much more than setting up tables and chairs. Whether you're planning a two-hour seminar or full-day event, think about the room configuration and details ahead of time. Consider the following:

- **Audio-visual equipment:** Most meeting facilities have audio visual equipment available. Make specific arrangements to have it placed in the room you are using, and confirm a few days before the seminar date.
- **Demonstration equipment:** If you will be holding a hands-on demonstration, determine where you want to set up your demonstration equipment. Look into electrical power availability.
- **Registration:** Set up a registration process at the event that captures each attendee's name, title, company name, address, and telephone number, and e-mail.

#### Follow-up

A seminar is only one part of a selling cycle. All your efforts may be wasted if you don't plan multi-touch follow-on activities that build on the relationship you've established. You can do several things to maximize the value of the seminar:

- **Evaluation:** Ask participants to complete an evaluation form before they leave. Participant evaluations can help you gauge interest in the topic covered, reactions to speakers, and things to do differently (or the same way) next time. Ask about the convenience of the location, whether the length of the seminar was appropriate, if the information was valuable, and so on.
- **Thanks:** Send a follow-up letter thanking the participants for attending and reiterating the seminar's key messages.
- **Calls:** Call everyone who attended to further qualify them. Remove unqualified contacts from your database. Offer qualified prospects something compelling to move them forward in the sales cycle, such as an IBM Executive Assessment.

#### Measuring success

Quantifying your success is key to any marketing tactic. Depending on your objectives, the following is a list of things to consider when measuring the event's success:

- Numeric Results/Conversion factors (projected and actual)
- Number of invitations mailed/number of accepted
- Number of accepted/number of attended
- Number of attended/number of qualified leads
- Number of leads/number of sales
- Revenue of sale
- Cost per attendee
- Cost per lead
- Return versus total investment
- Skills transferred (use this session as a way to train your own sales teams)

#### How IBM can help you

When you are ready to begin planning your seminar or event, IBM's PartnerWorld for Software provides valuable resources to help you with program execution. Some of these include:

- Seminar Solutions offer three unique ways to deliver seminar content to your customers: traditional seminars, e-seminars and teleseminars. IBM supports all three of these with all the content and materials you'll need to host a successful seminar, including a detailed checklist and fully scripted, customizable presentations, audience profiles, brochures, and other turnkey resources. Be sure to leverage these scripted presentations. They provide the essential elements of IBM products and solutions, as well as examples and words that will help you articulate benefits to the audience.
- IBM Campaign Designer Marketing Link is a new referral service which links IBM Business Partners to third party vendors who offer services designed to complement multi-touch, lead-generation activities. Some of the services include: Response Management, Teleservices, Event Audience Generation and Registration Services, Fulfillment Services, Marketing Analytics, Direct Mail/Printing Services, e-mail Marketing, and Webcast Services.

For more information, visit the following Web sites:

*Co-marketing*

[ibm.com/partnerworld/software/zone](http://ibm.com/partnerworld/software/zone) > Marketing resources > Co-marketing funding

*Executive Assessment*

[ibm.com/partnerworld/software/zone](http://ibm.com/partnerworld/software/zone) > Selling resources > Leads and opportunity analysis > Executive assessment consulting tool

*PartnerWorld University*

<http://www.ibmweblectureservices.ihost.com/pwu> > Sign-in > Sales and marketing college > Marketing skills development series

*Seminar Solutions*

[ibm.com/partnerworld/software/zone](http://ibm.com/partnerworld/software/zone) > Marketing resources > Marketing materials

#### Conclusion

Seminars and events are a proven way to educate and promote awareness among your target audience. As an approach that gives you direct interaction with prospects and existing customers, seminars can help build relationships and further the sales process. Careful planning and administration of the event are necessary to ensure success.

By leveraging the brand equity of IBM software within your seminar presentations, question and answer sessions, and follow-up activities, you can reinforce your unique selling proposition and demonstrate to your audience why your company is different from the competition.

#### Key takeaways:

- *Set measurable objectives as the first step in planning the event*
- *Bring content to life through guest speakers, customer testimonials, and hands-on demonstrations*
- *Designate a resource to handle event logistics to make sure the event runs smoothly*
- *Don't reinvent the wheel – seek out IBM marketing resources that you can build on to execute your seminar*

### Seminar checklist

The seminar checklist, shown below, breaks out the variety of items that you must handle to make the event successful. Please contact the appropriate IBM Regional Manager if you have additional questions.

For additional suggestions on executing successful seminars based on IBM software brands, see IBM Seminar Solutions at [ibm.com/partnerworld/software/zone](http://ibm.com/partnerworld/software/zone) > Marketing resources > Marketing materials

**Note:** The lead times noted below may vary according to your location.

### Pre-event activities

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#### 12 weeks:

- Identify the regional manager/point person within your area who will manage the seminar
- Choose cities within your region to hold the seminar. Choose and secure a seminar location. It is recommended that you select a mid to high-end venue (e.g., Ritz Carlton, Marriott, Hyatt, Renaissance, etc.).
- The event order form that you provide the hotel should include:
  - Continental breakfast including coffee and juices
  - Morning coffee break
  - LCD projector with screen
  - Table at front of room for computer and LCD projector
  - Easels for signage (signage/poster optional by region)
  - Registration table, two chairs, and a wastebasket
  - Room set up (classroom-style--two people per six-foot table; theatre style; rounds)
  - Set up by 7:00 a.m. the morning of the seminar
- Tailor and/or translate seminar content for your region (if applicable)
- Engage an event management company (if applicable)
- Develop a call center/registration campaign to handle: database modifications, report development, call guide development, response management mechanism setup (800#, e-mail, and/or Web), qualification survey, fulfillment, agent assignment and training
- Begin activities related to list development
- Find a presenter

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#### 8 weeks:

- Customize invitations

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#### 3-4 weeks:

- Mail invitations
  - One week after mailing invitation, begin follow-up telemarketing (include at least two attempts to contact each prospect)
  - Order handouts, literature packs, promotional items, and door prizes
  - Order signage
-

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**3 days before event:**

- Compile attendee roster
- Produce attendee name badges (you can include your company name with the IBM Business Partner logo)
- Confirm number of attendees to hotel
- Mail signage, literature/ handouts, and promotional giveaways to hotel
- Prepare on-site seminar host kit to include:
  - Banquet event order, including hotel on-site contact
  - Registration check-off list
  - All shipping paperwork with tracking numbers (# of boxes and contents listed)
  - All shipping paperwork for returning signage
  - Fax confirmation

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**1 day before event:**

- Confirm arrival of all shipped items, including:
  - Signage
  - Literature
  - Prizes
  - Name badges

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**On a daily basis:**

- Input registrants into database
- Send confirmation letters, product/seminar information fulfillment, registration and status updates to appropriate parties
- Transfer "hot" leads to your sales representatives

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**Day of event:**

- Confirm room setup
- Display signage
- Distribute presentation copies and other literature
- Display badges at registration table for sign-in
- Register each attendee for drawing
- Conduct seminar
- Present door prizes and promotional items
- Administer evaluation survey

**Post event activities**

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**1 day:**

- Tabulate evaluation surveys and completed roster
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**2 days:**

- Update attendees/no-shows in database
- 

**2-3 days:**

- Input evaluation forms
  - Mail "thank you" letters to attendees
  - Mail "sorry we missed you" letters to no-shows
- 

**1 week:**

- Telemarketing follow-up to no-shows, and to attendees who did not submit feedback
- 

**2 weeks:**

- Follow up with direct mail literature to attendees, no-shows, and other prospects.

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