

# Forecast Event Executive Summary

**Note:** This Event Executive Summary can be used in conjunction with our course on *Prospecting Through Educational Events and Workshops*. Using this summary and the guide together will assure nothing gets missed when planning your event.

## Event Description

The Forecast Event is held annually in the first quarter. This is an educational event for clients and prospects. During this presentation, last year's predictions by pundits will be reviewed and the outlook for the coming year will be discussed.

## Venue Ideas

- » Country Club
- » Conference Room in up-scale hotel, restaurant, or your office
- » Webinar from office conference room

## Who to Invite

Depending on your venue, you can invite 10 – 100+ attendees. Open the event to your clients and ask them to bring someone to introduce to your practice. This event can also be used solely as a prospecting event if you wish to purchase a list of names or publish an invitation in a local newspaper or periodical.

Each year, Carson creates sample invitations to accompany the event presentation. The examples can be found in the Carson Coaching Online Resource Library.



## How to Execute Event

- » Listen to Carson's annual webinar to hear the highlights from the presentation and questions answered about this presentation.
- » Many advisors like to offer a raffle prize which only clients who bring a prospect are entered.
- » Use Carson's speaker's notes to prepare for event. Practice – Practice!
- » Include time during the event to thank clients and prospects for attending.
- » Share a brief value proposition with attendees about how your firm is unique.
- » Ask attendees to complete the evaluation so events can always be improved.
- » Follow-up after the event with any referral names provided, as well as with prospects who attended the event.



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