

# Half-Time 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 Half-Time event is held annually in the third quarter. This is an educational event for clients and prospects. During this presentation, a review of progress in the first half of the year is reviewed and predictions for the remainder of the year are 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.
- » Some advisors have ended this event with a wine social. Other options could include: coffee nightcap, cheese tasting, or dessert mixer to end the evening socially.
- » Follow-up after the event with any referral names provided, as well as with prospects who attended the event.



**CARSON**  
COACHING

Carson Group  
13321 California Street  
#100  
Omaha, Nebraska 68154

carsongroup.com  
800.514.9116  
coaching@carsongroup.com