

Tips to Plan a Successful Workshop

Q. When is the best time to schedule a workshop?

- A.** When determining a date to hold your workshop, keep the following considerations in mind.
- Congregation calendar considerations:
 - Try not to schedule the workshop on a Monday or Friday night unless they are coordinated with existing events. Attendance is generally lower on these nights.
 - If you choose to host the workshop on a Wednesday night, be sure there are no conflicts with the congregation's ongoing Christian education classes.
 - Consider opportunities that may allow you to tie in with an upcoming event, such as a special workshop for married couples or retirees that a congregation is hosting.
 - Other calendar considerations:
 - Be aware of other events, such as high school sporting events, plays or concerts, and community and civic events that could impede workshop attendance.
 - Check into community-wide education program services to see if they are looking for adult enrichment opportunities.
 - Avoid holidays.

Q. Who should be invited to attend the workshop?

- A.** Each workshop is designed to address the needs of a specific audience. When promoting the workshop to a target audience, consider:
- How far they live or work from where the workshop will be held. The fewer miles they have to travel, the greater likelihood that they will attend.
 - Encouraging invitees to bring friends, family members or coworkers. People often find it easier to attend a workshop with someone else—and their guests can become valuable referrals.

Four Ps of a Successful Workshop

1. Planning

- Be organized.
- Plan ahead to allow invitees to find time on their calendar.
- Target your market—audience must fit workshop recommendation.
- Find a date/time; consider church and community events.
- Consider having another financial representative present. By promoting each other, you both benefit.

2. Practice

- Practice, practice, practice the presentation.
- The more relaxed and prepared, the easier it is to engage the audience and appear confident.

3. Place

- Find and secure a location.
- Verify equipment needs up front. (You don't want any surprises the day of the workshop.)
- Make sure location allows for a good experience for participants. Consider lighting, noise levels, access, etc.

4. Presentation

- Focus on participants and networking before you begin.
- Share a few short personal experiences that fit the content.
- Let participants talk and share; you are the guide.

Q. What steps should I take when mailing invitations to a targeted list?

- A.** Call. Mail. Call. Please make sure these phone numbers are being checked for Do Not Call list if they have not requested to be contacted.

Call individuals to tell them an invitation has been mailed to them. When you use this approach, they are much more likely to open the invitation when they receive it. In addition, if they are interested in the workshop, you can tell them you'll call again to confirm their attendance. Response rates can jump from the industry average of less than 5 percent to more than 20 percent by using this approach.

Other important tips:

- If you have hundreds of calls to make, hire a professional caller or enroll in teleservices.
- Follow the phone scripts that include basic information about the workshop.
- Keep the call short and to the point, unless the individual wants to talk.
- Document the individual's initial response to the invitation so you can follow up accordingly.
- Mail the invitation within a few days of the first call and at least three weeks before the event. Make sure you check the Do Not Call list first.
- Make the follow-up call within a week of mailing the invitation, even if the response was "yes" to your first call.

Q. How can I promote my workshop?

- A.** Event success often depends on early promotion to build awareness and generate interest. If hosting in a congregation, begin using these tools at least four weeks prior to the first session:

- Poster.
- Bulletin insert.
- Newsletter text.
- Flyer.

Two weeks prior: Pastor announcements.

Q. What if we may not meet the minimum attendance requirements?

- A.** If you are working with a congregation or Lutheran institution and do not have enough people registered (as agreed to in the Recommendation PowerPoint) a few days before the cutoff date:

1. Call the church or Lutheran institution leaders and let them know that the goal of registering at least eight people for the workshop was not reached.
 - Determine if there are any opportunities to reach out to small groups who fit the target market and encourage them to register.
 - Work with congregation contact to assist.

If you mailed the invitation and haven't received the minimum number of RSVPs, try the following:

1. Contact another financial representative in the area to see if he or she has clients who might be interested. Consider co-presenting or providing another expert at the workshop.
2. Call those who have RSVP'd and ask them to bring a friend or two.
3. If unable to reach the minimum number of participants, be sure to call and thank the people who registered. Let them know about other upcoming workshops. If they have questions about financial issues, schedule a Connect meeting or, if more appropriate, answer their questions.



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