

# SmartSeminars

## Turn marketing events into your #1 lead generator

It's a fact: developments like caller-ID and do-not-call lists have all but eliminated your ability to effectively telemarket to new prospects. As a result, promoting your business through value-added seminars is becoming increasingly important. But planning and executing seminars can be time-consuming and difficult, and they keep you from spending time on your top priority: your clients.

### Easily Manage Every Aspect of Event Planning

Available as an added feature to SmartOffice®, SmartSeminars is designed to help you and your staff manage every aspect of event planning, from initial marketing outreach, to follow-on communication, attendee registration, on-site planning, and lead tracking and follow-up. Direct integration with your SmartOffice database makes identifying and inviting the right prospects simple and fast, and detailed event management tools make it easy to assign and coordinate event-related tasks.

The SmartSeminars 'dashboard' gives you and your staff a bird's-eye view of each event, including each user's task list, task status, and data for all clients and prospects included in the target contact set. From this view, each user can update the status for related tasks, current contacts, and other event-related information. To help ensure that nothing falls through the cracks, each user's unfinished tasks are displayed as automatic alerts when the user logs into SmartOffice.

Following the event, outcome tracking tools and full integration with other SmartOffice modules make it simple to move attendees through the marketing and sales process, ensure timely follow-up by each advisor, and elevate the closing ratio for every seminar.



#### DATASHEET

- Streamline the planning and execution of seminars and events
- Enable collaborations among seminar members
- Get a bird's-eye view of each event
- Keep event planning tasks on track
- Schedule and track follow-up activities for each attendee
- Reduce the time and cost necessary to produce each event

# SmartSeminars provides these valuable features:

- > **Seminar and Event Tracking** maintains the details of all scheduled seminars and events, including users and tasks linked to each activity. A separate section specifies letters to be automatically sent to invitees as they are moved to a new status level.
- > **Seminar Sites Information** provides a master list of sites to conduct seminars.
- > **Seminar Invitations** allow users to invite existing contacts or add new contacts and invite them to a particular seminar or event. Invitations can be designated at multiple locations within the application.
- > **Action Prompts** guide users as they move invitees through the sales workflow based on their responses to pre- and post-event communication.
- > **Task Management** lets the user define and track event-related tasks. An unfinished task list is automatically generated and displayed when the listed tasks are not completed on the designated dates.
- > **Dashboard View** provides a dynamic view of the seminars and events linked to a selected contact.
- > **Seminar Reporting** tracks the effectiveness of seminars by providing statistical details about the seminar invitees following the event.

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SmartOffice - Windows Internet Explorer

**Summary Statistical Report for College Education Funding**  
As of 07/18/2007  
Prepared by: Blak

Statistics for Seminar by Event					
Site Name	Event Date	Invitees	Registered	Event Attendees	Interested Parties
ABC Hotel	10/15/2007	47	10	9	4
New York Hotel	07/19/2007	70	29	14	10
<b>Total</b>		<b>117</b>	<b>39</b>	<b>23</b>	<b>14</b>

  

Activity Outcome by Event											
Site Name	Appt. Scheduled	Call for an Appt.	Appt. Requested	Attended - Not Interested	Event Attended	Event Not Attended	Reschedule	Attended - Contact Later	Registration Cancelled	Spouse Participated	Additional People
ABC Hotel	2	1	1	3	2	8	0	0	0	0	3
New York Hotel	5	4	1	1	1	4	3	2	4	0	0
<b>Total</b>	<b>7</b>	<b>5</b>	<b>2</b>	<b>4</b>	<b>3</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>4</b>	<b>0</b>	<b>3</b>

Print

View consolidated seminar results at the push of a button with clear understandable reports.



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