

SEMINAR MARKETING GUIDE



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1. INTRODUCTION

This Seminar Marketing Guide shares our experiences in conducting seminars. We hope you will use it as the basis from which to pioneer new seminar approaches, build expertise in this marketing discipline, and conduct ongoing seminar programs.

The Seminar Marketing Guide discusses how to plan and promote your seminar. It also describes how to conduct a high-quality seminar event and how to follow up to make the seminar a successful selling tool.

We hope this guide gives you the helpful tips on planning, promoting, and conducting effective seminars that you need to achieve your sales objectives.

2. SEMINAR MARKETING: WHAT IS IT?

Seminars are a highly leveraged marketing practice designed to sell products and services. Seminars provide a cost-effective way to reach targeted customers, directly influence them with solutions-oriented messages based on their information needs, and then provide them with the next step in moving along the purchase cycle. While there is no simple definition for what constitutes a seminar, we have found the following definition useful:

A seminar is a one-to-many, informative, benefits-oriented presentation held in a controlled setting that provides solutions to a target audience's needs and gives that audience key marketing take-away messages, as well as a clear "call to action" to lead them through the next stage of the sales cycle.

Let's take a closer look at the important elements of this definition.

Seminars Are Information Sources

Like data sheets and product literature, seminars are vehicles to provide in-depth information. While some people prefer reading product and service brochures or reviews to help them make purchase decisions, others find a "live trial" experience more compelling and valuable.

Seminars tend to be viewed by attendees as a non-threatening environment where they can view and evaluate products and services for themselves. In addition, seminars add value in the post-purchase stage by increasing customer satisfaction, recommendation, usage and wide-scale product adoption, and lead customers to purchasing incremental units of products and services.

For technical products, a seminar can give an attendee the opportunity to see product "in action" without making a costly investment up front, and the opportunity to ask critical, technical questions.

Seminars Allow a High Level of Control

Because seminars are preplanned and organised, they provide a high level of control to the marketer. The location, the timing, and the message to be presented, are all predetermined. The benefit of such a high level of control is that you can be extremely proactive and targeted in your marketing. You have the time to plan your approach and develop precise messages that you want to give your audience, based on their information needs.

Seminars Offer Solutions

Seminars are not product demonstrations. Unlike a product demonstrations, which focus on product **features**, a seminar communicates solutions in the form of product **benefits**. Consequently, seminars typically take longer to conduct and plan than product demonstrations do because more time is spent — first, identifying the audience's needs, then demonstrating a product feature, and finally, explaining how the feature provides a solution to the audience in the form of advantages and benefits. Time is spent developing messages that will communicate to a customer how products can improve productivity or solve a business need.

Seminars Provide Key Take-Away Messages

The format of a seminar typically includes an introduction, the product presentation and benefits messages, and then a wrap-up of the seminar. The summary allows the presenter to sum up the presentation by providing key product take-away messages to the audience.

For example, an attendee may leave a seminar thinking, “Microsoft Windows and MS Office applications for Windows work together to make my job easier.” On the other hand, someone who has seen a product demonstration is more likely to recall features or fragments of the product, such as “online interactive help is useful” — not understanding how the products featured would directly benefit them.

Seminars Provide a Clear Call to Action

In addition to communicating key take-away messages, seminars typically close with a clear “call to action” to lead the attendee through the next stages of the purchase/sales cycle. This “call to action”, or “offer”, can be in many formats and is effective at pre-sale, post sale and technical seminars in encouraging attendees to purchase, recommend, or move to wide-scale adoption of products and services.

The call to action, or “offer”, needs to be an incentive based on your audience's needs, so you will need to tailor the offer. Here are some suggestions:

- In **pre-sale seminars** the incentive could be either a purchase, training or support incentive (when they use the training offer it results in wider-scale use; therefore additional units of product can be sold).
- For **post sale seminars** an offer could encourage additional or incremental purchases of the products featured because the seminar showed them how to gain additional productivity from those products. Another option is providing a support-related offer so attendees would be confident that once they purchase they would have software support options.
- For a **technical seminar** an offer would motivate an attendee to begin evaluation, implementation, purchase or wide scale adoption of the product based on what stage you want them to move to in the purchase cycle.

Generally, for technical products, training, support or consulting offers are effective.

Effective offers meet an attendee's needs for price, training or support. Some examples:

- A “special offer” for products at a discounted price (remember it is getting more difficult to discount price due to smaller margins on products)
- Information about services/product or strategic partners that can value-add to the product/service
- Offers for training services.
- Consulting offers, particularly on highly technical products and services

Differences Between Seminars and Other Marketing Practices

The following sections discuss the differences between seminars and product demos or training and the differences between seminars and events.

Seminars vs. Product Demos or Training

It is sometimes difficult to differentiate between training, product demonstrations, and seminars because each of these marketing practices involve showing or demonstrating products to an audience. But by looking at the typical questions these marketing practices answer for the customer, you can see how they differ:

Marketing Practice	Answers the Customer Question...	Content Strategy
Product Demonstration	What can this product do? (mainly pre-sale and some post-sale activity)	Highlight product features.
Seminar	What can this product do for me? How can this product help me be more productive? (Pre-sale)	Script addresses real-life business solutions, not just product features, as they relate to the audience's needs. Shows product extensibility, compatibility, and co-existence with other products and third-party solutions.
	How do I use and benefit from this product to the fullest extent? (Post-sale)	Show optimisation of product capabilities to promote “evangelising” of the products for individual and group adoption.
	How can this product meet my technical needs, support needs and integration requirements? (technical seminars, pre- and post-sale)	Script addresses technical product benefits and integration with existing products and systems.
Training	How do I use this product? (mainly post-sale activity)	Provide step-by-step “how-to” instruction. Usually hands-on training.

So, while similarities in these marketing efforts exist, there are really key distinctions in how customer needs are addressed. Each practice dictates a different strategy for content development to properly meet the audience's needs. In this guide, we will be specifically addressing seminars rather than product demonstrations or training programs.

Seminars vs. Events

Another source of confusion is the difference between what seminar marketing and event marketing (trade shows, conferences, and public relations events) are targeted to accomplish.

Marketing Practice	Format	Desired results
Seminar	A highly benefits/solutions one-to-many presentation in a controlled setting where audience attention is focused	To remove purchase and adoption barriers by giving customers the information they need in the form of business solutions.
	Designed for specific target addressing customer information needs	Can move attendee along the purchase cycle from consideration to evaluation, purchase or recommendation.
	Can be pre-sale or post-sale	In post-sale seminars, it may be to influence incremental purchases or reduce support costs
	Can include third-party participation and sponsorship.	Increase customer satisfaction
		Generate qualified leads for sales follow-up
Trade Show	Exhibit and/or booth-staffed event where you and other vendors interact with customers.	Generates awareness and leads Increases customer satisfaction
Conference	A forum where in-depth information is delivered to influential audiences on a single topic, issue or trend	Position personnel as experts in the industry.
		Develop strategic partnerships
	Includes multiple partners and/or sessions	Generate awareness and leads Increase customer satisfaction
Public Relations Event	An event tied to a specific news hook	Generate positive press
		Increases positive corporate image

You can see the difference in the desired results generated by using each marketing practice. Each activity is a valued marketing practice when used to reach an appropriate goal. Seminars fit in a distinctive place by providing

customers valuable information and the appropriate level of information they need at the right time in the right format for them to see the benefits for themselves. In a seminar setting they are also encouraged to take the next step, whether evaluation or purchase of product.

Through continually following a standard measurement program for all your marketing activity you will be able to compare goals versus results (performance) and choose which marketing practices work best to meet different customer needs.

How Seminars Fit into the Marketing Mix

Seminars are only one of the many tools available in the marketing mix. While seminar marketing is a successful and proven marketing practice, it is most effective when combined with other marketing activities to create a marketing mix aimed at achieving your desired business and sales objectives. Seminars work best when they're treated as a component of a larger marketing plan.

As for placement in the marketing mix, seminars can be used to accomplish a variety of marketing objectives. Seminars are extremely valuable as pre-sale "trial mechanisms", and cost effectively provide in-depth information to a large number of people.

In addition, seminars have a place in the post-sale phase of the buying cycle by increasing customer satisfaction, purchase and recommendation. Technical Workshops are a prime example of seminars geared to the post-sale phase, as the content focuses on installation, configuration, and troubleshooting of It solutions for the purpose of wide-scale adoption in the workplace. Technical Workshop post-sale seminars have also produced some remarkable results in the number of incremental product purchases. The post-sale seminar model works well for systems products because of the complexity of products and the diverse support issues associated with them.

While seminars are very effective in the consideration and evaluation stages of the cycle, seminars are not good "awareness" vehicles. It is nearly impossible to compel an individual to attend a seminar on a product in which they have no awareness or interest.

This table shows some examples of where seminars and other marketing activities can fit into the purchase cycle:

Awareness	Consideration	Trial	Purchase	Post Sale
Advertising	Advertising	Interactive working models	Incentives	Training
Public Relations	Trade Shows		Promotions	Conferences
Direct Mail	Direct Mail	In-store Demos	Pre-sale seminar (or Post-sale to encourage incremental purchases)	Newsletters
Events	Pre-sale Seminar	Evaluation Copies		Product Support
Trade Shows		Pre-sale Seminar		User Groups
				Customer satisfaction programs
				Post sale Seminars

Optimising the Effects of a Seminar

We find seminars to be great tools for increasing sales and generating new leads. Here are some suggestions for optimising the effects of the seminar:

- Have third parties deliver your seminar or showcase third parties, value-added benefits such as service, support, and consultation, to provide a total solution.
- Present case studies to describe how other customers have successfully implemented a solution with the products being shown. The audience responds more favourably to real-life scenarios.
- Include non-competitive vendors in the seminar to provide additional information for a more comprehensive solution.
- Most importantly, ensure that you have a solid follow-up and call-to-action plan so that attendees are compelled to establish a business relationship with Protech Australia and its partners.

3. FORMULATING A PLAN

Following are some of the most important points to consider when planning a seminar or a series of seminars.

Setting Objectives

When planning a seminar marketing effort, it's important to begin with a clear understanding of what you expect the seminar to accomplish. Before deciding how many seminars should be held, how many people should attend, in what markets, and so on, ask the most important question: "What **results** am I looking for?" Remember, seminars are a means to accomplish a marketing objective. A successful seminar means having seminar attendees **take an appropriate action after the seminar**.

The following are possible objectives that a seminar can help you achieve:

- Increase sales
- Generate new leads
- Increase your credibility in the marketplace
- Establish a strong rapport with existing customers
- Position yourself as an educator and problem solver

Coordinating Marketing Activities

After clear objectives are identified, it's important to look at the other marketing activities that you and your competitors are conducting to determine how your seminar fits into the overall picture. As mentioned earlier, seminars can't accomplish everything, so it's important to plan other marketing activities that feed into the seminar (to create awareness and interest in the seminar topic) and feed out of the seminar (such as follow-up, training, and more in-depth evaluation). To plan seminars that have impact, these leverage opportunities need to be identified early in the planning stages.

Also, you need to plan your seminar where and when it makes sense for your target audience. Be aware of competitive situations. And determine how you will distinguish your seminar so your target audience recognises the value of attending.

Site Planning

When determining the best place to hold a seminar, consider: **What would be convenient for the attendees?** This may be a hotel, a convention center, an on-site seminar at their location, or even your facility if you have the appropriate accommodations. Our experience has shown that engineering seminars are more successfully conducted in outlying sections of a city, while accountants and legal professionals generally prefer downtown locales. Once again, a clear and detailed understanding of the target audience will help you plan for the seminar site.

Tie-Ins

Keep in mind that third-party vendors (such as hardware or software vendors), strategic partners, consultants, or trainers may add value if they are included in your seminar. They can offer a total solution to the participants, thus increasing your ability to sell to that audience. In addition, they can deliver the seminar, share costs and offer additional support.

Budget Considerations

While the cost of each seminar varies depending on the size of the seminar, the market where the seminars take place, their frequency, and so on, the following percentages will give you a rough idea of the costs associated with seminars.

On-site Costs	15%	
Room rental	10%	Space for 200 theatre-style or 150 classroom-style seating
Catering	2.5%	Minimal coffee, tea, and juice service
Temporary employee	2.5%	A temporary service employee to manage on-site registration
Promotion	65%	
List rental	10%	Renting 6700 names
Creative	30%	New creative concept from advertising agency
Printing	5%	Printing 6700 four-colour, two-panel invitations
Postage	20%	Mailing 6700 invitations
Registration	5%	
Registration	3%	Using internal or temporary registration services
Confirmation	2%	Making one call to registrant to confirm attendance
Attendee Materials	10%	
Marketing materials	10%	Marketing materials that describe your company, services and support
Follow-up	5%	
Follow-up letters	5%	Sending follow-up letters to attendees and no-shows*

* Call and set up follow-up meetings with hot leads. You may want to implement a sales contest for those doing the follow-up, to really capitalise on the seminar leads.

Questions to Ask

When planning a seminar or a series of seminars, ask yourself the following questions:

- What are the marketing objectives of the seminars (move customers along the purchase cycle, improve customer satisfaction, generate leads)?
- Who is the target audience? (How receptive will they be to my seminar? Why will they care about my seminar topics? What is the “hook” to get them to respond?)

- What am I currently doing that would create the necessary awareness for the target customers to be interested in finding out more by attending a seminar (advertising, in-house demos, and so on)?
- How can I leverage the seminars with my other marketing activities (for example, by including seminar announcements in newsletters)?
- What is my overall budget? And what is an acceptable return on investment?
- What are appropriate tie-ins to employ (such as third-party hardware or software companies)?
- What is the call to action that motivates the audience to purchase? (Consider purchase incentives, product bundling, promotions, training, offers, and the like.)

Seminar Timeline

When planning a national seminar series, we work with a timeline similar to this:

.1

4-6 Months Before the Seminar

Formulate seminar concept and objectives

- Develop a target prospect profile (job function, company size, industry, and so on)
- Discuss how the seminar can address the needs of this audience
- Determine seminar coverage and reach

Develop strategies for achieving these objectives

- Determine if third parties should be included to achieve objectives
- Discuss seminar presenter options
- Identify leverage opportunities

Determine seminar promotional strategies

- Initiate discussion on the creative piece
- Determine promotional mix
- Initiate list selection and recommendation

.2

2-3 Months Prior

Detail support systems

- Make arrangements for registration process
- Specify material needs (signs, attendee packets, name badges, and so on)
- Develop a measurement plan, design evaluations, and arrange for tabulation process
- Determine a follow-up plan for seminar leads

- Select presenters and develop a training plan

Detail seminar content

- Outline seminar and determine agenda
- Determine appropriate equipment needs

Finalise seminar plans

- Reserve seminar facility and sign contract
- Get confirmation from third-party vendors for participation
- Print seminar promotional materials

.3 1 Month Prior

Mail direct-mail promotion

Schedule on-site registration/facilities support, if necessary

.4 3 Weeks Prior

Book advertising space for any newspaper promotion

Run through a rehearsal of the seminar content

.5 2 Weeks Prior

Run newspaper advertisement (if still necessary)

Mail confirmation

.6 1 Week Prior

Prepare for attendees

- Make calls to registrants to confirm attendance
- Make calls to boost attendance, if necessary
- Prepare seminar materials and equipment

.7 3 Days Prior

Final preparation

- Rehearse
- Notify hotel of number of participants for catering needs

.8 Day Before Seminar

Set up

- Check equipment and software
- Check seating arrangement

.9 Day of Seminar

Conduct a great event

- Register and greet participants
- Answer questions during breaks
- Distribute attendee take-away packets
- Emphasise Protech Australia and/or third-party support and services
- Close seminar and give them a call to action
- Collect attendee evaluation forms

.10

1-2 Weeks After the Seminar

Follow up

- Send thank-you letters
- Conduct follow-up visits to meet with qualified prospects
- Track seminar sales results

4. EFFECTIVE SEMINAR PROMOTION

Seminars can be promoted through word of mouth, newspaper and magazine advertisements, direct mail, or via any number of other promotional vehicles.

Overall, direct-mail marketing has been the most effective way to promote seminars. While newspaper ads provide some incremental boost to attendance, participants drawn by these ads tend to be less targeted than those drawn by direct mail and, therefore, the cost-per-response is higher. You may want to test various promotional methods to see which work most cost-effectively for you. See the chart in the next section for promotional vehicle comparisons.

It is important to attract a specifically targeted audience to your seminars, since a large number of attendees does not necessarily mean you will generate a large number of sales. You will want “qualified” attendees who are able to influence purchase or recommendation for software products.

Evaluating Promotion Alternatives

You can promote your seminar through a number of promotional vehicles, including word of mouth, newspaper and magazine advertisements, and direct mail. No matter which promotional vehicle you use, it's important to understand the benefits and most effective time to use each one. This chart highlights some of the advantages and disadvantages of each promotional medium for promoting seminars.

Media	Advantages	Disadvantages
Direct-mail	Reaches a highly targeted audience	Can be relatively expensive, depending on the size of the seminar audience
	Response can be controlled by varying quantity mailed	Reaches a narrow audience
	Timing of message can be easily controlled	Requires long lead times
	A single invitation can be used for multiple seminar times and locations	Can be logistically complex
	Message can be focused to meet your target audience's needs	Can require a number of different vendors (print shop, list broker, ad agency, data processing shop), although some vendors provide all or most of these services
	Results of mailings can be quantified for easier adjustment in future seminars	
Advertising	Some publications reach a targeted audience	Difficult to target a very specific audience
	Effective way to reach a broad audience	Cost per attendee can be relatively high
	Can lend credibility to your company, product, or service	Difficult to control the timing of when the ad is seen by prospective attendees
	Lead times can be relatively short, especially for local newspapers or journals	Difficult to control the number of responses
	Can be used to generate broad customer awareness	Difficult to estimate the number of responses

Media	Advantages	Disadvantages
Flyers	Convenient way to distribute seminar information to individuals you contact Can be included in letters to potential attendees Can be delivered in a variety of ways (as countertop literature, with newsletters, in product shipments, or as mini-posters)	Difficult to target specific audiences if used as posted notices Passive form of promotion Not very personal or noticeable in a general setting
Press/Publicity	Broad exposure Can lend credibility to your company, product, or service Can help to establish your company in the marketplace	Difficult to target specific audience May attract an inappropriate audience and detract from the seminar No control over the number of responses No control over what is actually printed
Personal Invitations	Personal and more likely to be read Allow very targeted distribution	Difficult to reach a large audience Usually limited to current customers
Telemarketing	Provides some personal contact, boosting response rate Provides an opportunity for attendee to ask questions Gives you an opportunity to "sell" people on attending	May annoy some potential attendees who dislike telephone marketing programs Can be relatively expensive to reach potential customers Training and setup can be expensive
Radio	Reaches a very large, broad audience Increases awareness and may boost your presence in the marketplace	Very difficult to target a specific audience Can be difficult for attendees to remember the call-to-action, since they may not be in a position to write or register immediately

Here are some things to keep in mind as you plan your promotional efforts:

Target Audience

The first step in planning your promotions is to have a clear picture of your target audience. This includes a definition of potential attendees and an understanding of their mind-set. What issues are they facing and what will they respond to? Are they current customers or new prospects?

In addition, you need to clearly define the mix of individuals you would like, for instance, 50 percent business executives, 25 percent MIS managers, and 25 percent business managers outside the MIS group. Having a clearly defined target audience will help you select promotional vehicles that can best deliver that audience to your seminar.

Timing

As you evaluate the different promotional methods available, keep in mind the deadlines and lead times you will face for each type. For example, if you wish to advertise in a monthly magazine, you will probably have to send your ad as much as two months in advance. This will also affect the lead time you can give your target audience as it plans to attend your seminar.

Call to Action

The primary objective in all of these promotional vehicles is **not** to sell products or services. Rather, it is to get potential attendees to register for your seminar. You will need to give them enough information to decide if the seminar is interesting and worthwhile to attend, but resist the temptation to say too much about products or services. Instead, provide a clear overview that includes:

- Who the seminar is for?
- What topics will be covered at the seminar?
- The benefit of attending?
- When and where the seminar will take place?
- How people can register?

Tracking Promotional Effectiveness

Finding the best mix of promotional methods is an ongoing process. The more seminars you host, the better you will become at determining the most effective methods of promotion.

This job is made simpler when you have compiled some quantitative information about the effectiveness of the various media used in promoting past seminars. For example, during the registration process you may want to ask attendees how they found out about the seminar. If this information is captured and recorded for all

seminar registrations, you can learn what promotional methods are most effective in delivering your target audience.

Comparing Promotional Costs

When selecting the best media for your seminar promotion, it helps to ask your existing customers questions such as which publications they read, which events they attend, and which organisations they belong to. The objective is to select the promotional methods that will deliver the right audience (size and makeup) at the lowest cost.

This table will help as you evaluate your media choices.

Media	Cost	% of Total Cost	Promotion Cost Per Attendee	Is This Realistic & Affordable?	Does it Yield
					the Attendees You Need?
Direct Mail	_____	_____	_____	_____	_____
Advertising	_____	_____	_____	_____	_____
Telemarketing	_____	_____	_____	_____	_____
Flyers	_____	_____	_____	_____	_____
Radio	_____	_____	_____	_____	_____
Personal Invitations	_____	_____	_____	_____	_____
Press Releases	_____	_____	_____	_____	_____
Other	_____	_____	_____	_____	_____

It may take some research to determine the costs for each of the media options listed above.

Direct mail. Determine your list strategy (buy external mailing lists, use internal lists, or both), get cost estimates for purchasing lists, and estimate costs for invitation design, production, and postage.

Print or radio advertising. Get rates on ad space or time from the potential publications or radio stations, and estimate the costs for ad design and production.

In general, think through the requirements of each medium and get realistic cost estimates for all the components required for effective promotion with that media. If, after calculating the costs and percentage of your total seminar budget that each medium will require, you determine that several of the options are either unrealistic or unaffordable, simply eliminate them from consideration.

However, if several media are both realistic and affordable, examine them in light of the last criterion in the table: **Would this method generate the number and calibre of attendees you need?** To answer this question, keep in mind the size

and nature of the target audience for your seminar. Examine the reach of each medium (the number of people who will read or hear your message) and the frequency of your message (the number of times your target audience will be exposed to the message).

If several media will deliver the number and calibre of attendees you require, then decide based on cost, reach, frequency, and the specific audience to use one or several of the promotional methods.

You may want to include media that focus on a particular audience subset to ensure that this group is well represented at your seminar. For example, if your target is business and technical managers in medium to large insurance companies, you may need to use one form of promotion for technical managers and another for business managers.

Your final decision will be based on all of the information available when you're planning your seminar promotions. By tracking the results of your efforts through simple research that asks registrants how they heard of your seminar, it will be easier to select the promotional methods for your next seminar.

Direct Marketing

For the most part, the effectiveness of any direct-marketing effort is based on the following success factors:

- 50% List Selection** (for effective customer targeting)
- 10% Creative Piece to sell the seminar** (designed to cut through the direct-mail clutter)
- 20% Timing** (seasonality and lead time for mail drop)
- 20% The Call to Action** (for seminar marketing, to attend a seminar)

As you can see, the mailing list governs 50% of the success of a direct-mail promotion. Clearly, the most creative invitation mailed to the wrong person will not generate the desired results. It is also important to continually refresh the list of names you mail to. The direct-mail industry standard for general direct-mail response is 1 to 2%. This response rate can be increased to 4% or better by carefully targeting the audience, concentrating on a strong creative piece, and planning carefully so that the invitations are mailed in enough time for the recipient to act — generally 4 1/2 weeks prior to the seminar.

.1 Customer Taxonomy

The first step in selecting a mailing list is to have a clear picture of the target audience. This includes the target attendee's customer taxonomy or "profile," such as an Influential End User, Fringe Influential User, or Computer Professional, and also a description of the mind-set of the audience.

Protech Australia uses a Customer Taxonomy model so we can consistently identify customers, as individuals, into meaningful categories or "segments", thus enabling us to better market to our customers. For seminars it allows us to

customise our seminars according to attendee profile, and to meet the needs of that profile.

In addition, it is always important to capture a seminar attendee's profile information (such as on an evaluation form) and add it to your customer database. This way you can begin to identify your attendees, identify their information needs, and customise your seminars as needed. You can also identify when the inappropriate customers attended — in this case they probably either didn't find all the information they needed or did not influence a software purchase. Capturing their profile allows you to build a database of customer names that you, and other groups in your subsidiary, can smartly target in your marketing activities.

Protech Australia has identified three categories of customers based on extensive research. These categories, or segments, result from concentrating on customers' job responsibilities (or job functions) rather than on just their job titles as a means to identify their business needs. They are:

- **Non-Users:** Both Influential and Non-Influential

Includes people who are generally not aware and are not using IT solutions yet.

*This segment will be important to Protech Australia in the future because they will represent potential incremental purchases beyond the current IT "community."

- **End-Users:** Influential End Users, Fringe Influential End Users and General Business Users

IEU = Has input in the IT solution decision for self and others AND gives more advice than receives about IT solutions

FIEU = Has input in the IT solution decision for self and others OR gives more advice than receives about IT solutions

GBU = Does not have input in the IT solution decision for self and others AND does not give more advice than receives about IT solutions

- **Computer Professional:** 8 segments that can be consolidated into 4 major segments

These segments are based on the customer's primary job functions, however, keep in mind that almost all of these segments perform secondary job responsibilities that may be part of another segment. The way to find these people is to ask them about their primary and secondary job responsibilities.

Professional Developers: Professional developers who develop IT solutions as a primary job function

Planners: Includes Strategists and Analysts

Computer/Software Salespeople

Supporters: Technical Support Professionals, System Implementors, Trainers/Tech Writers, and Press/Editors/Industry Experts.

Customer taxonomy is a useful tool to identify and market to your customers, and should be used consistently in your seminar efforts.

.2 Obtaining Names and Lists

It is important to obtain names for potential seminar attendees based on your target audience. There are a couple of ways to do this:

- Use existing customer lists segmented by profile criteria (sources may include product marketing activities, direct mailings, product launch events, etc.). Even though these may be current Protech Australia customers you can still “prospect” to them based on your objectives. For instance, a Protech Australia customer who has purchased mobile computers is a perfect candidate to attend a Remote Computing seminar prior to purchasing the products and services required to establish an effective remote computing solution.
- As another option, you may purchase new lists of names segmented by profile criteria. Here we would recommend you work with a list supplier/broker to obtain the most active and segmented lists possible.

When looking for a list supplier/broker of new names, consider the following to ensure the supplier/broker is providing quality lists:

- How often has the list been cleaned? (Cleaned lists have been checked for people who have moved, changed titles, and the like.)
- Is this a “compiled” or a “response” list? Response lists are made up of people who have actively responded to an offer. For example, a list of magazine subscribers is a response list because the people have already responded by subscribing to the publication. A compiled list, on the other hand, simply gives the names of people in a specific category, e.g., all the home owners in a city. **Response lists typically perform better than compiled lists because they are active rather than passive.**
- Is this a four-line address list? Four lines ensure the recipient is at a business address; not a home address. Most likely, invitations sent to homes won't get passed to colleagues. Unless you are specifically targeting a home user or home businesses, don't use home addresses.
- Are job responsibilities/functions available for your target audience? For instance, can you select people who make systems software integration decisions from the list?

Selects by job function are the most useful selection because it defines 1) how influential they are in making business decisions and 2) what their “buying power” or software purchase “attractiveness” is.

If you can't select by job function with specific profile information, then try to select people by their professional title that corresponds or describes a “typical”

set of job functions that matches your target. For instance, a MIS manager would typically evaluate, test, recommend and maybe even purchase software based on needs for entire departments or a whole company.

- What other selection criteria are available? These may include company size, revenue, industry-specific information, etc.
- Are there any local lists that include influential people who would buy or recommend software, and would attend a seminar? These could include local user groups, chambers of commerce, business organisations, and other local organisations.

Through experience, the best response (both in sheer numbers and the quality of the attendee) is obtained from the US popular computer magazines (such as PC Magazine, PC Week, and Info World) because the subscribers are already aware of MS products through ads and articles in the publication. These people are also technology enthusiasts, are likely to purchase early in the product life-cycle, and recommend software to others. Your list broker should have access to these types of lists.

For your existing registration base don't forget those customers who can help you achieve your seminar objectives. For example, look to those customer names that own one or two MS applications and can be upgraded to a full-line product such as MS Office.

.3 Tracking Lists

Tracking the effectiveness of lists is important to continually improve promotional efforts. The list mix can be improved by dropping poorly performing lists from the next purchase and adding new lists that are similar to the highest performing lists. Over time, list efficiency results in dramatic savings and increases response rates. In the Seminar Group, tracking codes are assigned to each seminar invitation, and captured during registration to measure the effectiveness of the lists.

.4 The Creative Piece

A direct-mail invitation should answer the following questions for the recipient:

- Why should I care about this seminar?
- What will I see if I attend?
- How will I benefit from attending — will it provide the information I need to solve my business problem?
- Where and when will the seminar take place? How much does it cost?
- How do I sign up?

When beginning a seminar promotion, you will need to produce a comprehensive Seminar Marketing Plan. This document gives detailed information about the seminar concept, goals, timing, target audience, and background information.

This document is then used to create a Creative Input Document. This document translates the seminar marketing goals (regarding the target audience, consumer promise, offer/call to action, and other factors) into an advertising agency's "language" and helps ensure that the agency understands exactly what is expected. In the Creative Input Document the agency needs to identify a strong consumer promise that will drive the creation of the invitation and materials.

Here are some important seminar invitation tips:

- Many seminar groups have found that printing the word "FREE" on the outside of the invitation is very compelling to a target audience that is already aware of your products or services.
- Try to keep the copy as short as possible and use the inside headlines to guide the customer to the telephone number to call to register.
- Try to get the offer (free seminar) and the call to action (call NOW to register) to be most prominent in the invitation.

Producing the invitation is one of the highest costs in seminar marketing. Here are some tips:

- With a continuing seminar series, one way to decrease the cost-per-piece is to print a large quantity of invitation "shells" and imprint the locations of the seminar at a later date.
- To curb costs you should consider printing in one or two colours instead of a four-colour palette.
- Do not use any die cuts whenever possible
- Keep to a standard paper size so you won't need to order special paper or pay for cutting costs; also, this will reduce your postage expenses

.5

Direct Mail Timing

The timing of a seminar and the direct-mail promotion are crucial. For example, many seminar groups have found that Mondays and Fridays are not popular seminar days. Further, avoid holding seminars on or near holidays.

As for promotional timing, the US obtains the best response by mailing the invitation 4 to 4-1/2 weeks before the seminar (for first-class mail in the US). Mailing third class in the US saves money, but the invitations need to drop from five to six weeks to arrive four weeks prior to the seminar. We have also seen lower response rates for invitations mailed third class. Newspaper advertising is less time-sensitive and is most effective one week prior to the seminar.

If possible, try to capitalise on other advertising/marketing vehicles to promote the seminars as well. For example, if Microsoft is also running product advertising, try to add a tag line that says, "To attend a free seminar call 1-800-555-5555 for more information." In order to track where a customer saw this tag line, be sure the ad is coded and the registration operator captures this code.

The “Offer” or Call to Action

In a seminar invitation, the “offer” is the seminar itself (rather than the actual selling of products). Stress this offer by focusing on the value and benefits of attending the seminar. For example, use call-to-action phrases such as “see for yourself” and “take a look at the products first-hand” to support the value of attending a seminar. In addition, promoting a FREE seminar is a powerful draw.

We have also tried promoting an additional call to action, such as discounted products for seminar attendees. While this increased response, it also decreased the quality of the audience; consequently, we no longer employ this technique.

Determining Mail Quantities and Response Rates

Direct Mail quantities are driven by an estimated response rate, attendance goals, and the estimated drop-off of customers who respond but do not attend the seminar. These variables vary greatly, depending on the seminar call to action.

When determining an estimated response rate, be careful not to overestimate the response because you will find yourself missing attendance goals and lacking invitations to increase the mail quantity. **Keep in mind the demand for such a seminar and the type of audience you are dealing with.** Determining a response rate is a guessing game, but obtaining your goal is achievable by knowing your audience, understanding the need for a particular seminar and/or products, and taking other variables into consideration, such as season of the year, product history, and the offer (is it free or at a cost?).

Here are a few guidelines in determining a **direct-mail response rate**:

- Is the seminar free or not? If it costs money, calculate a 1 to 1.5% response rate. If it is a free seminar, you can expect at least a 3-4% response.
- Is it taking place during a launch period for the product(s) being shown? If so, your response will likely be 1-2% higher, because of the publicity and built-up demand.
- What other marketing efforts are taking place to promote your seminar? Develop response rates for each marketing effort to ensure you meet your attendance goals. Factor in newsletters, flyers, advertisements, etc., because they will affect a seminar invitation response rate.
- Response rates will typically decline over time (four to six months) as the need for particular seminar/product information decreases.
- Any telemarketing follow-up with customers after the invitation has been sent will increase your response rate.

When determining your mail quantities, there are three things to consider:

- Your attendance goal
- Your expected response rate
- Your expected drop-off rate

Definition of Terms:

Attendance Goal	The number of total attendees you desire at your seminar (i.e., if you have a 150 seats, you want 150 people to attend).
Respondent Goal	The number of invitees who you will want to register for the seminar (this number will be higher than your attendance goal to allow for those who register, but do not attend).
Drop Off Rate	The percentage of invitees who register for the seminar but do not attend. Free seminars typically have a 30% drop-off rate; seminars at cost have a 1 to 5% drop-off rate. Keep this in mind when determining attendance goals.
Attendance Rate	The percentage of people who register and do attend the seminar.
Response Rate	The percentage of invitees who register for the seminar. They may or may not attend the seminar. This rate can be from 1-6%, but will depend on the customer information needs, target audience and market trends.
Mail Quantity	The number of Direct Marketing pieces you will need to recruit your targeted number of attendees (to meet your attendance goal).

.7

Calculating Mail Quantity and Response Rates

The following formulas provide you with the information you need to determine mail quantities and respondent goals that will deliver your attendance goals:

$$1. \text{Attendance goal} / (100\% - \text{your drop-off rate}) = \text{Respondent Goal}$$

$$\text{Mail Quantity} * \text{Response Rate} = \text{Respondent Goal}$$

$$2. \text{Respondent Goal} / \text{Response Rate} = \text{Mail Quantity}$$

.8

Sample Invitations

We have included templates of several sample invitations in this section. You'll find their corresponding files and templates on this CD-ROM. Simply click the Open Publisher button to see a template.

Advertising

Placing ads in a local newspaper or journal two weeks before your seminar can be an excellent way to generate attendance. Local advertising can be quite cost-effective, depending on the size of the ad and number of colours you use. However, advertising in national or regional magazines is rarely a cost-effective method for promoting a seminar, due to the difficulty in targeting specific audiences and the broad geographical coverage.

The primary disadvantages of using print advertising as a promotional method for your seminar are that it is not as targeted as direct mail and your ad will compete with other advertising in the publication.

If you are planning to incorporate advertising in your promotional plans or if you plan to add a seminar “plug” to an ad you already are planning to run, it is extremely important to plan the timing correctly. You need to know:

- The deadline for purchasing ad space and submitting materials for the issue in which you want to advertise.
- When the publication will be mailed.

Many monthly publications require a two-month lead time for purchasing ad space. And many publications do not mail until the second week of the month.

For example, if you want to advertise in a monthly industry journal for a June 10 seminar, you may have to run your advertisement in the May issue meaning you may have to purchase your advertising space and send in your materials as early as March! Local papers, on the other hand, can often accommodate one-week turnarounds to place ads. Again, the key issue is planning so you know the deadlines that apply to your seminar.

Frequency is another important consideration in planning your strategy. The standard frequency for a direct-response ad is three to four times in any given publication.

If your advertising is used to supplement other promotional methods, it should run about two weeks before the seminar. The ad should answer the following questions for prospective attendees:

- Who is the seminar for?
- Why should I care about this seminar?
- Will the information it provides help solve one of my problems?
- What will I see if I attend?
- Where will it be?
- How do I sign up?

Advertising tips:

- The most effective places for your ads are usually local publications or those with local or regional issues.
- Use daily, weekly, or biweekly publications. Monthlies require a lot of lead time, and it is difficult to plan the timing that will effectively generate attendance.
- Run ads about two weeks before the seminar.
- Consider the number of ads you need to run to reach your audience.
- Plan for a no-show rate of 25 to 35 percent.

- Make sure the ad makes it clear “who should attend” so that it is “self selecting” (readers will determine whether or not the seminar applies to them).

.1

How to Create an Advertisement

The files we have provided on this CD-ROM (for PCs in Microsoft Publisher formats) contain advertisements, as well as templates into which you can insert your own ad copy, company name, and logo. These files give you a head start on developing your own artwork — simply customise them for your particular seminar.

Headline

Subhead

The subheads are intended to expand on the idea presented in the headline. Choose one of those provided or modify them as needed for your particular market.

"Who Should Attend" Information

This box clearly calls out who the target audience for the seminar is. Since ads in general are not as targeted, this will help people make sure the seminar is appropriate for them.

Call to Action

This box addresses the immediacy of taking action. It should list a telephone number where people can call during customary business hours to make a reservation for your seminar.

Text

This is the ad copy. This basic information can be used with minor revisions for almost any business-computing seminar. It should be brief and concisely tell your audience about the “hot points” of what you will cover.

Location

This box clearly shows the place and the time of your seminar.

Logo

This area is available for you to position your company's logo.

.2

Sample Advertisements

We have included templates of several sample ads in this section. You'll find their corresponding files and templates on this CD-ROM. Simply click the Open Publisher button to see a template.

Flyers

Flyers can be an effective and useful addition to your seminar promotional mix. Using flyers to promote your seminar can take two forms:

- A handout to distribute to potential attendees as you come in contact with them
- A “poster” to place in prominent areas that are frequented by your target audience

There are a couple of situations where flyers may be the only promotional material you need to develop:

- If you are planning a small seminar for a single company or department (preferably at the customer's site), you can post flyers in common areas within the offices of that company or department such as the cafeteria or mailroom or place them directly in personal mail slots.
- If you are intending to mail personal invitation letters to generate attendance (see the “Invitation Letters” part of this section), you can include a flyer with the letter to describe the seminar in more detail.

However, unless your seminar falls into one of these categories, you probably shouldn't count on flyers to attract your entire audience. Not only is it extremely difficult to plan for the number of attendees who may be attracted by flyers, it is almost impossible to predict the type of audience that flyers may attract.

If your seminar does call for flyers, make sure the flyer text answers the following questions for the recipient:

- Who is the seminar for?
- Why should I care about this seminar?
- Will the information it provides help solve one of my problems?
- What will I see if I attend?
- Where will it be?
- How do I sign up?

Tips for using flyers:

- If you're using flyers in addition to other promotional methods, be sure the flyers reflect a common promotional “look and feel.” In other words, all materials should look like they are promoting the same seminar.
- Make sure the flyer is clear about “who should attend” so that it is “self selecting” (readers will determine whether or not the seminar applies to them).

.1

How to Create a Flyer

The files we have provided on this CD-ROM (for PCs in Microsoft Publisher formats) contain flyers, as well as templates into which you can insert your own

ad copy, company name, and logo. These files give you a head start on developing your own artwork — simply customise them for your particular seminar.

Headline

Subhead

The subheads are intended to expand on the idea presented in the headline.

Location

This box clearly shows the place and the time of your seminar.

Text

This bulleted copy can be used with minor revisions for almost any business-computing seminar. It should be brief and concisely tell your audience about the “hot points” of what you will cover.

Call to Action

This box addresses the immediacy of taking action. It should list a telephone number where people can call during customary business hours to make a reservation for your seminar.

Logo

This area is available for you to position your company's logo.

.2

Sample Flyers

We have included templates for several sample flyers in this section. You'll find their corresponding files and templates on this CD-ROM. Simply click the Open Publisher button to open the file that corresponds to the template you are viewing.

Invitation Letters

Personal invitation letters may be an appropriate substitute for direct mail in your seminar-promotion efforts. If your target audience is relatively small (fewer than 20 attendees) or if you are sponsoring an event strictly for existing customers or some other group with which you've had frequent contact, you may want to simply invite these people with a personal letter rather than a direct-mail invitation. If you have decided to produce flyers for your seminar (see the Flyers section of this guide for more information), it's an excellent idea to include one with each invitation letter.

Tips for personal invitation letters:

- Personally sign each letter to enhance the personal touch.
- Make sure the individual's name is spelled correctly.

- Address the envelopes by hand; the recipient will be more likely to read the letter.
- Use postage stamps rather than a mail meter to lend an additional personal touch.
- Mail letters first-class about three to four weeks before the seminar.

.1

Sample Invitation Letters

We have included templates for sample invitation letters in this section. You'll find their corresponding files and templates on this CD-ROM. Simply click the Open WinWord button to see the file corresponding to the template you are viewing.

(insert date)

Dear (insert customer name) _____,

As a Microsoft customer, you are no doubt aware of our ongoing commitment to continuing education in helping you run your business more productively. Today, this has become especially important as computer systems are taking on greater roles — and are being used by more people — in organisations such as yours.

This letter is my personal invitation to you to attend an in-depth seminar that updates you on the Microsoft® Windows™ operating system and Windows-based applications that can help you be more productive. It's a three-hour free seminar, especially geared for those making the move to the Windows operating system.

Our seminar gives you a chance to see the very latest in Windows-based software from Microsoft. If you attend this seminar, you'll learn:

- How to make the switch to the Windows operating system while leveraging your current software investments.
- How to be more productive with Microsoft Windows-based applications.
- How easy it is to get up to speed quickly with Microsoft's easy-to-use graphical interface — once you've learned one application, you're well on your way to learning them all!

You'll also see:

- The new database for Windows — Microsoft Access®.
- Why so many Lotus 1-2-3 users prefer Microsoft Excel — THE spreadsheet for Windows.
- Why so many WordPerfect users prefer the award-winning Microsoft Word, Version 2.0 for Windows.

The seminar is offered to you at no charge and will be held (insert date) _____, from (insert time) _____ at the (insert location) _____. Because space is extremely limited, I've taken the liberty of holding a place for you. I will call you next week to confirm this reservation and answer any of your questions. I'm sure you will find this free seminar extremely beneficial.

Yours sincerely,

(insert Microsoft field representative name) _____

(insert Microsoft field representative title) _____

(insert date)

Dear (insert client name) _____,

As a client of Microsoft Corporation and (insert third-party name) _____, you are no doubt aware of our ongoing commitment to continuing education in helping you run your business more productively. Today, this has become especially important as computer systems are taking on greater roles — and are being used by more people — in organisations such as yours.

This letter is my personal invitation to you to attend an in-depth seminar, co-sponsored by Microsoft Corporation and (insert third-party name) _____, that updates you on the business computing solutions applicable to the Microsoft® Windows™ operating system and Windows-based applications that can help you become more productive.

Our seminar gives you a chance to see the very latest in Windows-based software from Microsoft. If you attend this seminar, you'll learn:

- How to make the switch to the Windows operating system while leveraging your current software investments.
- How to be more productive with Microsoft Windows-based applications.
- How easy it is to get up to speed quickly with Microsoft's easy-to-use graphical interface — once you've learned one application, you're well on your way to learning them all!

You'll also see:

- The new database for Windows — Microsoft Access®.
- Why so many Lotus 1-2-3 users prefer Microsoft Excel — THE spreadsheet for Windows.
- Why so many WordPerfect users prefer the award-winning Microsoft Word, Version 2.0 for Windows.

The seminar is offered to you at no charge and will be held (insert date) _____, from (insert time) _____ at the (insert location) _____. Because space is extremely limited, I've taken the liberty of holding a place for you. I will call you next week to confirm this reservation and answer any of your questions. I'm sure you will find this free seminar extremely beneficial.

Yours sincerely,

(insert third-party representative name) _____

(insert third-party representative title) _____

Telemarketing

Using a telephone staff to promote your seminar by calling targeted individuals offers a number of benefits that are not possible with other media. The greatest of these is the opportunity for the potential attendee to speak to a “live” person, ask questions, and have a “real-time” dialogue. This method allows you to answer questions and “sell” the prospect on attending the seminar. Finally, no other method allows such an immediate response after hearing about the seminar with telemarketing, the individual can be contacted, sold on attending the seminar, and registered in a single call.

Despite these benefits, telemarketing may have a limited role in your promotional efforts due to these limitations:

- It's difficult to acquire name lists that provide phone numbers, especially if they are business not consumer lists.
- There is a relatively high “missed-contact” rate. Many individuals are difficult to reach by phone and may never be contacted successfully.
- The cost per successful registration (operator contacts, sells, and registers the attendee) is relatively high compared with other promotional methods.

Again, if you decide to promote your seminar with telemarketing, your staff will need to answer these questions:

- Who is the seminar for?
- Why should the attendee care about this seminar?
- What will the attendee see if he or she attends?
- Where will it be?
- How do attendees sign up?

Tips for promotional telemarketing:

- Be sure the lists you purchase have telephone numbers for most names.
- Train all operators or staff on the same telephone script so that the information you are distributing is consistent.
- Give operators or staff written directions to the seminar site so they can provide this information to the attendees if necessary.

.1 Sample Telemarketing Scripts

We have included templates for sample promotional telemarketing scripts in this section.

- Scripts should focus on selling the seminar, not the products being shown. Tell customers what they will see versus why the products are great.

Hi. This is Pamela Kincaid from Microsoft Corporation. I'm calling regarding a free upcoming seminar we're hosting in the Long Beach area.

At Microsoft, we take every opportunity to connect our customers with the latest computing solutions for their business. That's why we're pleased to invite you to this exciting Making the Move to Windows and Windows Applications Seminar we're hosting. This seminar will feature our industry-leading Windows operating system and Windows-based applications software. We will show you how to automatically generate letters to customers by using Microsoft Word, which makes it easy to create great-looking documents — and Word also features WordPerfect help, so your WordPerfect users can continue to be productive and learn the Microsoft Word commands at the same time. We will show you how Microsoft Excel can help you manipulate and analyse your data. Microsoft's spreadsheet application can present this information visually with over 90 different chart types. This seminar will allow you to see these products in action.

This Making the Move Seminar will be held on June 25th from 8:30 AM to noon. This session is designed to provide you with all the information you need to make the right computing decision for your business. Would you like to register for this free seminar?

IF NO:

Then we will keep your name on our mailing list and notify you of any upcoming seminars in your area.

IF YES:

Great! (Register attendee). Do you know of anyone else in your organisation who might want to attend? We have additional room available and would be happy to register them now. We will be sending you a letter a few days prior to the seminar just to confirm your attendance.

Thank you and we hope you will enjoy the seminar. We're looking forward to meeting you on June 25th!

Hi. This is _____ from (insert your company's name) _____. I'm calling regarding a free upcoming seminar we're hosting in the (insert city) _____ area.

At Microsoft (or, As a Microsoft Partner), we take every opportunity to connect our customers with the latest computing solutions for their business. That's why we're pleased to invite you to this exciting (insert seminar name) _____. This seminar will feature (describe agenda, insert Microsoft product names and product selling points as appropriate).

This (insert seminar name) _____ will be held on (insert date) _____ at (insert time) _____. This session is designed to provide you with all the information you need to make the right computing decision for your business. Would you like to register for this free seminar?

IF NO:

Then we will keep your name on our mailing list and notify you of any upcoming seminars in your area.

IF YES:

Great! (Register attendee). Do you know of anyone else in your organisation who might want to attend? We have additional room available and would be happy to register them now. We will be sending you a letter a few days prior to the seminar just to confirm your attendance.

Thank you and we hope you will enjoy the seminar. We're looking forward to meeting you on (insert date) _____.

Hi. This is _____ from (insert your company's name) _____. I'm calling regarding a free upcoming seminar we're hosting in the (insert city) _____ area.

As a Microsoft-supported (insert third party type) _____, we take every opportunity to connect our customers with the latest computing solutions for their business. That's why we're pleased to invite you to this exciting (insert seminar name) _____ we're hosting jointly with Microsoft. This seminar will feature (describe agenda, insert Microsoft product names and product selling points as appropriate).

This (insert seminar name) _____ will be held on (insert date) _____ at (insert time) _____. This session is designed to provide you with all the information you need to make the right computing decision for your business. Would you like to register for this free seminar?

IF NO:

Then we will keep your name on our mailing list and notify you of any upcoming seminars or special promotions in your area.

IF YES:

Great! (Register attendee). Do you know of anyone else in your organisation who might want to attend? We have additional room available and would be happy to register them now. We will be sending you a letter a few days prior to the seminar just to confirm your attendance.

Thank you and we hope you will enjoy the seminar. We're looking forward to meeting you on (insert date) _____.

Branding

Seminars are an opportunity to enhance the image of Microsoft through high-quality events that deliver valuable information to a large number of customers. Through national, field, and international seminars, and third-party-sponsored seminars, we have the opportunity to promote and implement Microsoft seminars that have the same look, feel, and “identity.” We recognise the need to develop and implement a “seminar sub-brand” that extends to our third-party seminar partners and around the world.

Research shows that seminars raise the perception of Microsoft among attendees from a rating of 23 prior to the seminar to a rating of 45 after the seminar (on a scale of 15). In effect, the presentation of a high-quality seminar enhances the image of Microsoft with the attendees.

The marketing that happens before each seminar can be leveraged to enhance the Microsoft image by developing a consistent look and tone used for all seminar promotion and materials. Positioned as integrated events, Microsoft seminars will have greater impact on customers who receive the invitation or see an advertisement, whether they attend the seminar or not. The seminar brand will be used by Microsoft headquarters, field, international, and third parties.

The seminar brand will complement and support the overall Microsoft Corporate Brand.

.1 The seminar sub-brand

Combining a consistent look in advertising and materials with our seminar philosophy and attributes creates the seminar brand. Customers will come to know that every Microsoft seminar will have the same level of quality and value of information. The seminar brand will be manifested in two ways:

- Consistent look for seminar promotion (including direct-mail pieces and advertisements), handouts, merchandising, and slides
- Delivery of the following seminar brand attributes: Consistent quality
- Valuable benefit-oriented information
- Appropriate level of information
- Available when needed

Every attendee who leaves a Microsoft seminar should leave with these three take-aways:

- This was a quality event that met my expectations. I expect high-quality events from Microsoft. Microsoft events are always of high quality.
- The information presented was valuable to me. My time spent at the event was well worth it because I learned the things I needed to learn. The things I learned are probably not available elsewhere.

- The level of information was exactly what I needed to learn more, make an intelligent evaluation, and make a decision. It was the right level of information for me, and it was available at a Microsoft seminar when I needed it.

A seminar sub-brand can help you achieve many goals because it:

- **Establishes a seminar identity:** customers will come to recognise your promotion as a consistently high-quality Microsoft event and will attend because they know they will benefit from it as a valuable information source.
- **Differentiates Microsoft to the customer:** more and more software companies are doing seminar marketing, but they don't offer the same quality experience as Microsoft does.
- **Establishes consistent expectations:** of a professional, high-quality event that delivers both valuable and appropriate information for the customer's needs.

Legal Requirements

When planning any seminar or event, it's important to comply with all legal requirements.

Fire and Health Regulations. Don't assume that the facilities we utilise for seminars comply with local fire and health regulations. Ask the question.

Occupational Health and Safety Regulations. Ensure that all occupational health and safety regulations are complied with during all phases of the seminar: setup, running and pack up.

Indemnity Forms. If running the seminar in conjunction with a high risk activity (e.g. driver training, sail training, horse riding, ballooning, gliding etc.) ensure that an Indemnity Form is made available to all attendees, read, understood, signed and collected.

Anti Discrimination. Ensure you comply with national and/or state laws that prohibit employment discrimination against qualified individuals with disabilities who can perform essential functions of the job with or without accommodations.

The facilities we utilise for seminars or events must be accessible to individuals with disabilities.

Also, reasonable accommodations must be made for disabled participants so that they may enjoy the same services as those who are not disabled. For example, we must consider:

- Providing an interpreter or devices to assist hearing-impaired attendees
- Providing up-front seating for visually impaired attendees
- Making sure all seminar facilities are wheelchair accessible.

.1 Notice of availability of accommodations

All materials developed for external publication should have the following statement incorporated into the materials. (This notice should be in larger fonts if possible and located in a conspicuous location.) This statement serves to communicate Protech Australia's interest in making events accessible to the disabled community.

Needs for Special Accommodations

Protech Australia is an Equal Opportunity Employer. As such, our goal is to ensure that our events are accessible to all individuals, including individuals with disabilities. If you require special assistance, auxiliary aids, or any other reasonable accommodations, please call (insert your registration phone number) at least two weeks prior to the seminar date.

5. HOW TO DEVELOP THE SEMINAR CONTENT

Developing the seminar content is probably the most difficult and painstaking process of the entire seminar planning process. The seminar messages need to be carefully tailored to properly meet the audience's expectations and needs, and the product must be clearly presented as a solution to those needs.

Successful content is produced by concentrating on three key areas:

- Product positioning and take-away messages
- Benefits and feature sets
- Storyline (the Scenario)

Positioning and Message

Generally, most people can remember three things about the individual products after the seminar. So, develop your content to highlight three key marketing take-away messages. For example, in a seminar segment that discusses Microsoft Excel, the content might feature these three positioning statements: Power Made Easy, Professional Looking Output, and Easy and Efficient Conversion from Lotus 1-2-3®.

Everything the presenter demonstrates and says in each of the sections is designed to deliver and solidify the product-positioning message. If you've been successful, an attendee will walk away thinking, "Excel is powerful, but it's sure easy to use," "I can produce some very professional looking reports with Excel", and "It will be simple to convert my Lotus 1-2-3 files to Excel files."

In addition, focus on key messages that support the MS full line of products. It is becoming increasingly important that the individual product messages are synchronised to provide total business solutions for the attendee.

Features and Benefits

When planning which features are to be highlighted in your seminar, it is important to:

- First identify the features that correctly position the product with the target audience
- Then list the features in the order they will be shown during the presentation

This is not an easy task and often requires difficult decisions that may end up cutting a “favourite” feature. Just remember that unless the feature solves a problem for this particular audience, it doesn't belong in the seminar — no matter how exciting the feature may be.

Every feature presented should answer the question, “So what?”, for the audience. Benefits translate the features of the products into tangible advantages for the seminar participants. The benefits presented in a seminar invite the participants to think, “I can use this product because it allows me to solve a business problem or complete a task I must perform regularly (or do something I couldn't do before).”

For example, the benefit of Excel's “drag and drop” feature is that it makes everyday tasks easier because you can easily share information between documents, thus increasing efficiency in the workplace by decreasing the time a user spends editing a document with more arcane methods. Again, this translation of features to tangible benefits is what separates a seminar from a product demonstration.

Storyline

The storyline is the thread that ties the entire seminar together. It is designed to allow a diverse audience to relate to the work tasks, or business problems, and solutions presented.

For example, one of Microsoft's U.S. seminars is based on a storyline of a fictitious company called Encore Musical Instruments. They used Microsoft Office applications to help the fictitious company's marketing manager accomplish these common business tasks:

- Microsoft Word for Windows helps prepare a monthly status report detailing their marketing activity for the month.
- Microsoft Excel for Windows helps the marketing manager create business reports, including forecasts and summary sheets detailing their sales of musical instruments.
- Microsoft PowerPoint for Windows helps the marketing manager make a quarterly presentation to their key customers.
- Microsoft Project for Windows helps plan for the resources needed to create a new product line of pianos.
- Microsoft Access for Windows makes it easy to design a database of customer names and addresses, and then create mailing labels from that database to send a newsletter to customers.

In addition to translating the product features to customer benefits, a storyline allows the presenter to smoothly transition between different tasks using different applications. The storyline makes it easier to capture and maintain an audience's attention during a lengthy software presentation by showing

attendees how to solve everyday business problems using applications that provide easy ways to complete everyday tasks and business solutions.

Setting up your content into these business-solution tasks, or “modules”, will allow you and others giving this seminar to add in or delete certain task sections later if needed. Shorter presentations can then be built out of the longer seminar format very quickly.

Writing the Seminar Script

Seminar scripts come in many shapes and sizes. We've found success in splitting the script into three columns. The first column highlights the features that the presenter must discuss. The second column contains the actual script or suggested wording for the presentation (we include some humour and audience-interaction tips in the script to keep the audience alert and interested). The third column lists the keystrokes to demonstrate the product features.

In addition, we also include a summary of the storyline and a detailed description of the setup required to give the presentation. This includes a list of any modifications to the demonstration computer's initialisation files, or anything else that would affect the seminar.

When the scripting is approximately 80% complete, we conduct a “content certification review” (full rehearsal) to examine the script contents and make any major adjustments before finalising the document.

Conducting an Effective Seminar Presentation

Conducting an effective seminar isn't easy. Your seminar message must be carefully tailored to ensure that you properly identify the audience's needs and then clearly present the products and your business as a solution to those needs.

Don't leave anything to chance. The flow of the event is critical: Conduct a rehearsal so that everyone knows what they will say and will feel comfortable in front of the audience. You will shine if you appear calm, prepared, and confident during the seminar.

To help you get a feel for what happens at a successful seminar, following are some suggested steps for conducting an effective seminar presentation:

Steps for all sponsors

1. **Make introductions.** As host, you should kick off the seminar with a short introductory message. Thank people for coming, explain why you are conducting this event (that is, why it is important to them), and outline the agenda. Be sure to point out the location of the refreshments table and the restrooms to help attendees feel at ease. Finally, introduce the presenter.
2. **Mingle.** At the break, talk with your attendees and make sure there are sales representatives on hand to meet the attendees and answer

questions. This is a prime opportunity to form new business relationships.

3. **Welcome them back.** After the break, welcome the audience back and re-introduce the speaker.
4. **Provide the next step.** Be sure you provide a clear “next step” for your seminar attendees. They should understand that not only may they buy the product but that they also have a partner in solving their business problems. Make them feel that they get additional benefits because they have invested their time to sit through the seminar.
5. **Don't rush off.** Stay around to answer questions and meet all of the attendees. If it's appropriate, immediately arrange follow-up calls with them.

When you're planning what you will present during the seminar, you may want to assign various parts of your segment of the seminar to other people on your team. This helps them feel more ownership in the event and adds variety to the seminar.

Additional steps for co-sponsors

If co-sponsors participate in the seminar, you could also include these steps:

- 1A. **Present case studies.** Right before the break period, stand up and recap the discussion so far. This is a good time for co-sponsors to present a short case study on how the presentation applies to a real-life scenario. (Work with the Microsoft representative prior to the event to select an appropriate case study.)
- 4A. **Highlight the co-sponsor's business.** The end of the Microsoft presentation is not the end of the seminar! Now is the time for the co-sponsor to explain, in a clear and compelling way, the value of his or her company to the attendees. The co-sponsor should discuss why the company is a good business partner, and the solutions it offers for the needs and business problems of the attendees.

6. ON-SITE EVENT MANAGEMENT

Coordinating the mechanics of a seminar (the seminar facility, catering, equipment, registration procedures, and seminar materials) requires careful orchestration and detailed planning up front. Each element of the seminar should focus on providing attendees with a comfortable setting where they can watch the seminar with few distractions.

Site Selection Recommendations

Establish clear criteria for seminar sites that you can articulate to the hotel/site sales staff. You may be booking sites in multiple locations and not have the opportunity to personally inspect each one prior to the seminar.

When determining the best place to hold a seminar, consider what will be the most convenient for the audience. This may be a hotel, a convention center or a “Techmart”-type of meeting facility. Above all, the site you choose should be easy to locate, should offer free and easy parking, be accessible to disabled persons, and have a comfortable room in which to hold the seminar.

Making the Room Just Right

Consider the following when arranging for a seminar facility:

Recommendations and Helpful Hints on Booking Venue Space (Based on 150 attendees)

Booking Recommendations for seminars:

- **Room reservations:** Book the room as early as possible, especially during prime convention time
- **Available dates and times:** Coordinate the seminar dates and times with the Catering / Sales Contact at the venue. Once arrangements have been made with the venue, minimal changes should be made.
- **Room Size:** Square room approximately 2,500 square feet to accommodate either 150 classroom-style setup or theatre-style setup.
- **Ceiling Height:** 12 feet or higher (for use with a 9 x 12)
- **Screen size:** Either 8 1/2' x 10' or 9 1/2' x 12', based on 150 attendees
- **Projector Rental Suggestion:** Barco or Sony Data projector i.e.: Sony 1270, 1271

Tips on ways to save money / time....

- Negotiate the initial price with beverage/food service, adjust the times of the room rental and include any audio-visual rental(s)
- An 8am–5pm time-frame will usually be lower in price than booking the room the evening prior for set-up
- Coordinate with your hotel contact to receive, in writing, verification of your room costs, times and date(s). This will reduce the possibility of double-booked space. This could come in the form of a contract or confirmation letter, but make sure that you get something in writing signed by your hotel contact as soon as possible once the space is booked.
- Request a Banquet Event Order from your hotel contact outlining the details of the seminar; review for accuracy.
- Send a “spec letter” outlining the seminar specifics including a room diagram and a rental-needs checklist, which should include all the fine details of the seminar.

Questions to ask to help avoid last-minute surprises....

- Is the room ADA-approved? i.e.: is it wheelchair-accessible?
- Is the room able to be locked? Security may need to be hired if setup is the night before.
- Obstructions in the room? i.e.: permanent stages, pillars, chandeliers (and how low they hang)
- Is the room carpeted to keep noise level at a minimum?
- Will the room need to be completely darkened?
- What is the maximum capacity classroom- or theatre-style for this room, include AV setup?
- What is the size of the foyer space outside of the room for registration, and any third-party participation?
- If you are planning third-party participation and they are demonstrating software, arrangements can be made with your hotel contact prior to the seminar for electricity hook-ups, extension cords, etc.

Room size

The size of the room depends on the size of the audience. Classroom-style seating (chairs with a table) works best for seminars of fewer than 150 people, and theatre-style seating is best for 150 or more people. The classroom style is most comfortable and usually preferred by the audience. But for large groups, the tables put too much distance between the presenter and audience, making the seminar less effective because it seems impersonal.

Room shape

Square rooms or short and wide rooms are best for seminars. A short and wide room makes it easy for everyone to see and hear the presenter. Long and narrow rooms are less effective, and it is difficult to see the screen from the back of a long room.

Curtains and dividers

Look for a room with a door that can be closed tightly and a wall-like divider for privacy. (A curtain can't sufficiently muffle noises.) Ensure that the room can be sufficiently darkened for product demonstrations.

Sight lines

A room with a high ceiling (at least 12 feet high) provides better viewing for attendees because the room can accommodate large-size screens. Ask if the room has chandeliers, pillars, or anything else that may obstruct the audience's view.

Room controls

An audience is easily distracted if the room is too hot or too cold. Check to see if there is easy access to temperature controls. Also, lighting must frequently be handled by the presenter. It's best if the presenter can control the lights from his or her speaking position in the room. In addition, dimmer switches allow the room to be darkened without going completely black.

Tables and accessories

You need a head table for the presenter. Consider placing tablecloth-draped tables with chairs outside the room for registration. Most hotels provide pens and tablets for the participants at no charge.

Catering

Hotels usually discount room-rental rates if catering is included. Participants usually expect some sort of snack at morning seminars. For afternoon seminars, people generally are satisfied with drinks. To keep costs down, you may want to sponsor a brown-bag lunch seminar or an after-work reception.

Confirming Your Meeting Details

No later than one month prior to the meeting date, you should reconfirm all of your meeting specifications with the facility. The best way to do this is in a specification letter (see example on the following pages).

A specification letter should include the following:

- On-site contact name (presenter)
- Any AV equipment that you wish to rent
- Detailed schedule of events, including setup, registration, actual meeting times, breaks, and time you will be out of the meeting room
- Refreshment order with beginning and ending time you want them served

- Detailed room diagram
- Detailed list of additional items you need from the facility (bulletin boards, raffle bowls, baskets for pens, coat racks, registration tables, and so on)
- All details that were given to you at the time of booking (room-rental, dimensions, maximum capacity, ceiling height, accessibility, billing information)
- Materials and equipment that you are shipping, and a request for shipping specifications you should know about
- Billing information (what should be billed and to whom)

You can never be too specific. This will safeguard you from potential site problems.

Three days before the seminar, call the hotel or meeting facility to confirm your number of attendees. In this call, it is important to go over all details one last time. Again, this will help to alleviate on-site problems.

.1 Sample Specification Letters

We have included templates for sample specification letters in this section. You'll find their corresponding files and templates on this CD-ROM. Simply click the Open Template button to see the file corresponding to the template you are viewing.

.2 Facsimile Cover Sheet Template

Facsimile Cover Sheet

Microsoft Corporation
One Microsoft Way
Bldg 22/4
Redmond, WA 98052

To: «contact»

Company: «dboSITENAME»

Phone: «phone»

Fax: «fax»

From: «name», Seminar Coordinator

Company:

Phone: (xxx) xxx-xxxx

Fax: (xxx) xxx-xxxx

Date: today, 1994

Total number of pages including cover sheet: 7

Enclosed are the details for the «Seminar Name» on «date».

Please disregard any faxes and details from previous Microsoft functions as all details have changes and/or are new. Please feel free to contact me should you have questions.

Thank you for your attention to the details of this fax!

«name»

Confidentiality Statement

The information contained in this facsimile message is legally privileged and confidential information intended only for the use of the addressee listed on this cover sheet. If the reader of this message is not the intended recipient, you are hereby notified that any dissemination, distribution or copy of this facsimile is strictly prohibited. If you have received this facsimile in error, please immediately notify us by telephone at the number listed on this cover sheet and return the original message to us at the above address via the United States Postal Service. We will reimburse any costs you incur in notifying us and returning the message to us. Thank you.

.3 Confirmation of Arrangements Template

Today, 1994

«contact»

«dboSITENAME»

«address»

«dboCITYname», «State» «Zip»

This memo is to confirm the arrangements that we have made to date for the «seminar name» to be held on «date».

1. ROOM RENTAL

Room Scheduled: «dboROOMname»

Time Booked: «comments»

Rental Rate: «rate»

Dimensions/Square Footage: «dimensions»

Ceiling Height (12 ft minimum): «ceiling_height»

Classroom style accommodates: «classroom_capacity»

with:

Room tentatively set for 110 people (confirmation of number 2-3 (two to three working days prior to seminar).

15 feet in the front of the room will be needed for our AV equipment.

The «dboROOMname» has lighting that can be dimmed (excluding exit signs).

Please notify me immediately if any of the above-listed information is incorrect.

Please see Attachment C for a diagram with details of our room setup and rental needs. I will be contacting you 2-3 (two to three) working days prior to the seminar to confirm attendance numbers and details for setup.

Billing Information

Direct billing should already be arranged for our seminar. If an account has not yet been established, please fax a direct-billing application to «name»at (xxx) xxx-xxxx. Items to be direct billed include:

- Seminar meeting room rental
- Catering
- Audio-visual equipment
- Any tax or service charges that may apply
- Temporary help charges

If you have any additional charges that we should be aware of (projection fees, union fees, power fees) please notify me 2 (two weeks) in advance.

All guest rooms and incidentals will be paid by individual credit cards.

ALL invoices must be sent to the following address and contact to ensure prompt payment:

«Company Name»

Attn: «Name»

«Address»

«City, ST Zip»

«Presenter» has on-site authority to make any needed changes. You may also contact me at (206) 936-3864 or fax (206) 936-9197 with any questions or concerns.

Thank you for your time and attention to our seminar. We look forward to working with you.

Sincerely,

Kathy Richardson

Enclosures

*This letter and attached documents support all previous discussions and arrangements made between «dboSITEname» and Microsoft. This information is based on the specifications we were given by «contact». If you see any discrepancies in the information provided in the letter above, please contact Microsoft immediately.

.4 Schedule of Events/Food and Beverage Template

Following are the times for food and beverage service on «date» for approximately 110 guests: For menu specifics please see Attachment A.

Night prior Setup:

6:00 pm Room completely set, including all AV rental equipment placed in room.

«date»

8:00 am Seminar registration begins - <type of breakfast to be served>

9:00 am Seminar begins

10:30 am Break - <type of snack to be served>

12:00 pm Lunch served in <location> (Please refresh meeting room at this time.)

1:00 pm Seminar reconvenes

2:30 pm Break - <type of snack to be served>

4:30 pm Seminar Ends

6:00 pm Microsoft out of Room

Special meals and services may be needed for ADA attendees. We will notify you immediately with any requests. Please be advised that these may be requested on site.

.5 Room Setup and Rental Needs Check List Template

Provided by Hotel

Below are our rental needs and room setup specifications. Please check off each item and notify me if there is anything you cannot provide:

____ (1) Wireless Microphone Lavalier (cannot be handheld or around neck).

____ (1) 9x12 Fast Fold Screen (Must be 9x12, no substitutions please).

Important: Please have this in room during setup. If there is an additional fee, we do not need a drape kit for the screen.

____ (3) Easels; one by registration table and two for directional signs.

____ (2) 6 foot tables with (2) chairs outside of the room for registration.

____ (1) 4' or 6' table (STURDY) in front of room for projector (see diagram).

____ (1) 6' table in the rear of room for literature.

____ (1) 8' table on riser (stage right, at an angle so presenter can view screen) with a lighted standing podium for presenter.

Please make sure that there is ample walking space on the riser.

____ (1) Glass bowl for raffle names on registration table.

- _____ (2) Baskets for pens on registration tables (we will provide pens).
- _____ Beverage station at the rear of the room (with water). If space does not allow, please place in a convenient location outside room.
- _____ NO Smoking in the meeting room.
- _____ All tables are to be draped and skirted.
- _____ Beverages are to be served in glassware. Please do not use disposable cups.
- _____ Garbage cans near beverage station and registration tables.

Provided by Microsoft & delivered to Hotel

All equipment and materials will be sent to: «Presenter»

Arriving 1-2 (one to two) days prior to «date»: Boxes of Materials

Arriving 1-2 (one to two) days prior to «date»: Four Anvil Cases from SHO-Air

When the boxes arrive, please leave a message at the front desk for «dboROOMname», indicating their location

Due to the value of this equipment, we ask that it be stored in a secure (locked) place.

Please place all boxes and A/V cases in «dboROOMname» prior to setup.

SHO-Air will pick-up equipment on «date» at 6:00 pm. All arrangements have been made by Microsoft.

If there are any shipping specifications that I should be aware of, please notify me so I can make any necessary arrangements.

.6 Banquet Event Order Template

ATTACHMENT A

BANQUET EVENT ORDER

Special meal request may be requested by attendees. We will advise you of special request a minimum of 72 hours prior.

.7 Sample Room Diagram Template

Click the Open Template button to open the sample room diagram template.

Equipment Recommendations

The equipment used for the presentation can make or break a seminar. The important thing to remember when selecting equipment is that the projected image displayed for the audience should be sharp, clear, and large enough for all to see. While the type of equipment used varies according to the products

featured and the size of the audience (some equipment serves an audience of 20 better than an audience of 150), two criteria are always important: reliability and quality.

Reliability ensures that the equipment doesn't fail during the seminar (meaning that equipment should be regularly scheduled for downtime maintenance).

Quality equipment ensures that the attendees can clearly see the presentation. Any sacrifices in reliability or quality will seriously impede the effectiveness of the seminar. Proper equipment is a critical success factor in seminar marketing.

.1 To Rent or Purchase

The next consideration is whether to rent or purchase your projection equipment. If you will be conducting seminars throughout the year, consider that equipment rentals will add up, possibly making an initial equipment investment pay off. If you choose to rent equipment, be prepared to articulate exactly what you'll need for the presentation. Your negotiating power depends on what you ask for. In particular, if you are holding your seminar at a hotel, be sure that whoever is ordering audio-visual (AV) equipment for you knows exactly what you need.

What to rent or purchase

Front-screen projection is generally the easiest setup. Particularly for audiences of 40 or more, a front-screen projector with a 9'x12' screen is best for maximum visibility and clarity. The following recommendations are from the national seminar experience gained in using this equipment over the past two years. These are average purchase prices as of April 1993:

DaLite Fast-fold Screen 9'x12' (with frame and carrying case)	\$ 938.00
Sony 1270QB Data Projector	\$ 13,000.00-14,500.00
Barco 800 Data Projector	\$ 15,000.00

Other projectors for rent or purchase that will work:

- Sony VPH-1251Q
- Any Barco data or graphic projector (400, 600, or 800)
- Electrohome 3000 or 4000 (always check the brightness on this machine)
- NEC DP-1200 or 5000
- Espri 2000 or 4000 (very good)

For audiences of less than 70, you can use an LCD panel and overhead setup, and a 10'x10' or 9'x12' screen. The key is to ensure that everyone can see the presentation. Also, confirm that the overhead runs bright and stays cool, and that the LCD panel will emit clear images even when warm — there can be problems if the overhead is too hot. The advantages to using LCD panels are their portability and easy setup; the disadvantages are that large audiences cannot see them and they are mostly limited to computer images (only some do video images).

LCD panels are usually 9 or 12 inches across. There are many dealers, so be sure to talk to a local audiovisual company that you trust. Most LCD panels only do 640x480 images. They can be VGA- and Mac-compatible (the two listed below are compatible).

A recommended LCD setup might contain:

3M 955 Overhead	\$ 800.00
nVIEW Spectra C	\$4400.00
Proxima Colorworks SX	\$3800.00

.2 Shipping Equipment

If you need to ship equipment to different sites, you should have sturdy cases with plenty of foam padding for protection. Seminar Marketing has specifications for these cases we use, if you decide to have them built. Below is an approximate cost per case type:

Projector	\$1100.00
Screen	\$ 522.00
Monitor	\$ 395.00
Sign	\$ 450.00
Public Address system	\$ 333.00

You may find an AV or shipping company that has cases to rent. Again, weigh the cost of frequent rentals with purchasing.

If shipping via ground transportation consider a minivan or small moving truck. SMG has contracted with both AVIS and U-Haul, and you can get competitive rates. This could cost as little as \$30 or as much as \$240.

If shipping via air transportation, consider such factors as weight, insurance, and timing. For National Seminars, we've paid \$400-600 for about 500 pounds by 2nd Day.

Remember to pick a carrier that will commit to taking good care of your equipment. Always label each piece clearly. Don't sign for the equipment as received until each case and piece is inspected for damage. Note any damage directly on an air-bill prior to the driver leaving so the air-bill can be used to justify a damage claim.

On-Site Staffing

Having registration staff members greet and sign in attendees as they arrive satisfies two needs:

The need to capture information.

By signing in attendees as they arrive, you are able to confirm from pre-registration who attended the seminar and who did not. Capturing the names of

attendees is also critical for follow-up purposes. You can conduct telephone follow-up with these attendees to get their impressions of the seminar and to track whether or not the seminar influenced them to purchase and/or recommend Microsoft products.

The need to allow the seminar presenter time to prepare.

Make certain there is enough help on hand to manage the registration process and allow the presenter enough time to prepare for the presentation. Depending on your needs, two registration staffers can usually handle 250 to 300 registrants.

Seminar staff members can be members of your company, temporary employees, or hotel staff hired for the seminar day. If temporaries or hotel staff are hired, be specific in describing the type of person needed for the job and to instruct the agency that they are expected to be dressed professionally. If you need someone with computer skills to do online registration, specifically ask for someone with these abilities. If you do hire temporaries, allow some training time before the event.

See the following checklist for some responsibilities you might want to assign these staff members.

.1

Seminar On-Site Checklist (Template)

Please read the following page to help you understand your general responsibilities for this Microsoft seminar. When you arrive on site you'll receive specific training from the Microsoft presenter. Keep in mind throughout the event that you are the first impression many of these attendees have of Microsoft — be sure to make a great first impression!

Before registration begins:

- Talk with the presenter about registration & needs throughout seminar
- Obtain registration list(s) and, if an Office seminar, the date stamp for offer forms from presenter
- Open all cardboard boxes and arrange seminar materials; give presenter seminar kit items
- Help presenter adjust lights and room temperature
- Get contact names from presenter to reach Banquets, Engineering, etc. departments at the site in case you need to take care of catering, audio-visual or room problems
- Place signs in appropriate places
- Know where the restrooms and pay phones are located

During registration:

- Greet attendees with a smile and warm welcome.
- Conduct registration using two lines: one for confirmation letters and one for attendees without confirmation letters.

- After they register, remind attendees to place a business card in our bowl for the raffle.
- Check off the attendee's name either as having submitted a confirmation letter or as not being on the registration list (if they don't check in you would leave both columns blank).

During the seminar and at the short breaks:

- Tally the number of letters submitted and the total number of attendees at the top of the registration sheet
- Position yourself at the door to make sure it doesn't slam or create noise; at the breaks prop open the doors for easy access and close them after people have returned to their seats
- At the beginning of the seminar continually check for open seats and direct attendees where to sit
- Continually monitor room temperature, lights, catering and any other details by positioning yourself just inside the seminar room
- Kindly ask attendees who have cellular phones or beepers to turn them off during the seminar; ask anyone having a loud conversation during the seminar to please step out in the lobby and continue their conversation.
- Help the presenter time breaks by watching that they are only 10-15 minutes long — signal to the presenter that the break is over
- If Office Seminars, date-stamp offer forms to be ready for the end of the seminar/ Collate Offer forms & referral list

Your lunch and breaks:

- Make sure one assistant remains at the seminar registration table or inside the seminar room door while the other takes a break or lunch
- Do not take lunch between 12:00–1:30pm because of lunch break (NT & VB) or registration for the second seminar. You are entitled to a fifteen-minute break for each four hours of service and, if working a full eight hours, you are entitled to a 1-hour lunch; please coordinate these with the other assistant.

After the seminar is completed and attendees begin to leave:

- Prop doors open for easy access to the lobby
- Immediately begin collecting Seminar Evaluation Sheets — some attendees leave quickly — and hand one offer form to each attendee
- Help prepare the Federal Express packages (do not seal), collect the seminar signs, and tidy the registration table

Between Morning and Afternoon Seminars:

- Clean up registration desk and prepare (as you did in the morning) to conduct registration again

- Follow the steps above again

Before you leave the Seminar location:

- Be sure to tell the presenter you are finished with all details. Check with him/her to make sure that everything is done.
- Be sure to have the presenter sign your time card and give him/her a copy.

.2

On-Site Registration Support Personnel Template

ATTACHMENT B

ON-SITE REGISTRATION SUPPORT PERSONNEL

Please assist us in scheduling one (1) registration support person for the «Seminar Name». Our budget is \$xx.xx/hr for the following: (Please note: If you are unable to provide this support person, please notify me **immediately** as we will need to make other arrangements.)

Date: «date»

Start Time: 7:15 am

End Time: 11:15 am (will be given one (1) 15-minute break.)

Report to: «Presenter» at registration desk

Seminar attire: Business / Professional attire

Requirements: PC computer experience, excellent customer-service skills, flexibility and ability to handle registration and miscellaneous event responsibilities.

Responsibilities: Setting up registration table with collateral, registering seminar attendees, handing out collateral, updating Microsoft database program with attendee information and other duties as assigned by our staff.

ACTION: Please fax this form with the following information completed to «Name» at (xxx) xxx-xxxx two (2) weeks prior to the seminar:

Name of on-site support person_____

Is this person an employee of your hotel_____Yes_____No

If no, name of company/agency support person is from:

Emergency contact (must be available at 7:00 am on «date»):_____

Emergency contact phone number:

(____)_____

I agree to the above information and agree to provide one on-site support person at the «Seminar Name».

Signature_____Date_____

Registration

The registration process is an important precursor for successful seminar marketing. It helps you with planning so there are no surprises the day of the seminar, and provides customers with confirmation that the seminar is in fact taking place where and when they've heard. Important information to capture during registration is the attendee's name and the company name, address, phone number, and mail list code tracking number. It helps to let the registrants know you want this information so you can contact them should there be a change in plans. In addition, encouraging registrants to bring a friend or business partner can help increase attendance.

Registration helps not only in planning for the event, but also in giving an extra personal touch for the attendees. An important closure to registration is acknowledging that the attendee has registered when he or she arrives at the seminar site. People are very appreciative when the greeter looks at a list and says, "Yes, we have you down here. Thank you so much, Mr. Smith, for coming." On the other hand, people are very disgruntled when their pre registration information is lost or incorrect.

Finally, registration captures valuable leads and list analyses that can be used in future direct-marketing campaigns. The name of someone who is willing to commit the time to attend a seminar is extremely valuable. If a customer is unable to attend the seminar, it is still valuable to capture their information to keep on a mailing list for future seminars.

.1 Managing Your Own Registration

Tips for managing your own registration

- When planning your promotion, track the promotional piece that generated your registration either by a code or by probing during the registration call.
- The customer registration should capture the full name, company name, address, and daytime phone, in addition to the seminar session for which they are registering. The complete address and phone can be used for confirmation follow-up as well as for future marketing efforts.
- To identify the seminar session that a customer is inquiring about, you should associate a code with that seminar. When the customer provides this seminar code, it can significantly reduce the confusion during registration for multiple or simultaneous seminars.

- To capture the complete name, address, and phone number, your registration service should provide a representative to talk with your registrants. This ensures that all information is accurately completed and questions are answered. This level of service also provides a positive customer-service experience, setting the stage for your seminar. Using an operator also gives you the opportunity to confirm the site and time with your customer.
- During the registration call, make sure that customers have the option to register additional interested and qualified people from their office.
- Confirmation letters and/or confirmation calls can be very effective in converting registrants into attendees. Letters are most effective when mailed 10 working days prior to the seminar, and confirmation calls should be made three to four work days prior. The letter content should follow the consumer promises made in your promotion and confirm what they will see at the seminar, in addition to site, time, and registration details. Again, this level of service shows the registrant that you are interested in their participation and encourages them to attend
- At the seminar, you can use your registration database as your on-site check-in sheet. Once the seminar is over, you should update your database with a flag indicating that the customer attended, did not attend, or was a walk-in attendee. This helps you in follow-up communication with your customers and can provide you a target list. As your seminars grow in popularity in your district, you might find that some registration efforts are best leveraged within your office and others are best managed through a vendor. If you have a mix of registration methods for your seminars and promote them on the same piece (a district newsletter, for example), it is important that you clearly call out the accurate registration phone number for each seminar listed. This helps to eliminate questions and misdirected phone calls. In addition, if you clearly print your seminar code next to each seminar, you can further reduce questions in the registration process.
- If you choose to allow fax-in registration, keep in mind some of the following challenges you may encounter:
 - Ability to trace, or even be aware of, unreceived faxes
 - Difficulty controlling registration limits
 - If the seminar fills, additional calls must be made to faxing registrant(s)
 - Incomplete faxes will require additional follow-up calls

.2

Confirmation

Active confirmation (sending a letter, calling the pre-registrants, or both) reduces the average no-show ratio of 50 percent by half. In the U.S., typical “no-show” rates (the percentage of people who register for a seminar but don't actually show up) range from 25 to 35 percent for free seminars. We've found that calling a pre-registrant three to five days before the event is the most efficient way of reminding registrants about the seminar because people usually pick up their

telephone messages. Confirmation should be mailed at least 10 working days prior to the seminar and the envelope should clearly indicate that a seminar confirmation is enclosed. These letters are effective if used for check-in at the seminar. A letter and a confirmation call is the best means to reduce the no-show ratio.

Confirmation Letter Components

If you send a confirmation letter, include the following components:

- A thank-you for registering for the seminar
- Confirmation for attendance at this seminar
- The seminar date, time, and location
- Suggested arrival of 20-30 minutes before seminar time to check in, and use of the letter for check-in
- Two or three highlights of the seminar
- Check-in phone number to call with questions

Tips for attendee confirmation letters:

- Your tone and message should convey that the attendee is confirmed and that you are planning for his or her attendance.
- Send the letters about 10 days to two weeks before the seminar, so attendees receive it the week before the seminar.

Confirmation phone calls

The information you should cover in confirmation phone calls is very similar to that covered in the confirmation letter. If you make confirmation calls, cover these points:

- A thank-you for registering for the seminar
- Confirmation for attendance at the seminar
- The seminar date, time, and location
- Suggested arrival of 20-30 minutes before seminar time to check in

Confirmation calls offer at least two additional opportunities that are not possible with confirmation letters:

1. Provides personal confirmation shortly before seminar and, if the registrant is not available, messages on voice mail are still effective.
2. If your registrations are lower than you'd like, you can ask the attendee to think of others in his or her company, or even outside of it, who might be interested in attending the seminar.

Tips for attendee confirmation calls:

- Your tone and message should convey that the attendee is confirmed and that you are planning for his or her attendance.

- Call about three to five working days before the seminar.

.3 **Sample Confirmation Letters**

We have included templates for sample confirmation letters in this section. You'll find their corresponding files and templates on this CD-ROM. Simply click the Open WinWord button to see the file corresponding to the template you are viewing.

.4 **Confirmation Letter (Microsoft Only) Template**

<Today's Date>

<First Name><Last Name><Company><Address 1><Address 2><City><ST><Zip>

Dear <Mr./Ms.><Last Name>:

Thank you for your interest in **the Introduction to Windows NT Workstation™ and Windows NT Server** seminar. This letter serves as confirmation of your personal reservation for the following seminar date, time and location:

Month, Day, 1994

8:30am - 12:00noon

Seminar Location

Location Address

City, ST Zip

To make registration quick and easy, please arrive 30 minutes before the seminar and use this letter to check in.

When you attend this technical overview, you will get a first-hand look at how NEW Windows NT Workstation 3.5 and NEW Windows NT Server 3.5 enable you to leverage your current investment in information systems while providing a more robust computing environment for your end-users.

If you find you are unable to attend the seminar for any reason, please call (800) 557-0800 weekdays between 6:30am and 5:30pm Pacific Time to cancel your reservation.

Again, thank you for your interest in the **Introductions to Windows NT Workstation and Windows NT Server** seminar. We look forward to seeing you.

Microsoft is a registered trademark and Windows and Windows NT are trademarks of Microsoft Corporation.

.5 **Confirmation Letter (Microsoft and Third-Party)Template**

Compaq \ Microsoft Ready to Work Seminar

One Microsoft Way
Redmond, WA 98052-6399
<Today's Date>

<First Name><Last Name>
<Company>
<Address 1>
<Address 2>
<City><ST><Zip>

Dear <Mr./Ms.><Last Name>:

Thank you for your interest in the Compaq \ Microsoft "Ready to Work" seminar. This letter serves as confirmation of your personal reservation for the following seminar date, time and location:

Month, Day, 1994

9:00am - 12:00noon

Hotel/Location

123 Main Street

Seattle, WA 98101

To make registration quick and easy, please arrive 30 minutes before the seminar and use this letter to check in.

When you attend this seminar, Microsoft® and Compaq® will give you the information you need to make informed decisions about your hardware and software investments.

You will see a full range of high-quality, high-value products including:

- Microsoft® Office
- Microsoft Windows™ for Workgroups version 3.11
- The Compaq LTE® Lite Family
- The Compaq ProLinea Line
- The Compaq Concerto Family

If you find you are unable to attend the seminar for any reason, please call (800) 550-4300 weekdays between 6:30am and 5:30pm Pacific Time to cancel your reservation.

Again, thank you for your interest in the Compaq \ Microsoft "Ready to Work" seminar. We look forward to seeing you.

© 1994 Compaq Computer Corporation and Microsoft Corporation. All rights reserved. Microsoft is a registered trademark and Windows is a trademark of Microsoft Corporation. Compaq and LTE registered US Patent and Trademark Office Compaq Computer Corporation.

.6 Confirmation Letter (Paid Seminar)Template

<Today's Date>
<Customer ID number>
<first name> <last name>
<company>
<Address1>
<Address2>
<city>, <St.> <zip>

Dear <Mr./Ms.> <last name>:

Thank you for registering for the Microsoft Access® 2.0 Developer's Seminar. This letter serves as confirmation of your personal reservation and payment receipt of \$299 U.S. funds. The seminar date, time and location are listed below:

Month, Day, 1994

9:00am - 4:30pm

Hotel / Location

Hotel Address

City, ST Zip

To make registration quick and easy, please arrive 30 minutes before the seminar and use this letter to check in.

In this one-day technical demonstration and lecture, you'll learn how to develop professional database applications from scratch using the innovative features of

the new Microsoft Access 2.0. The seminar focuses on techniques and knowledge you can put to use immediately. You'll learn how to:

- Quickly create powerful database applications for Windows™.
- Use Wizards to build highly interactive forms and easily create complex reports.
- Use Microsoft Access Basic to give you full control over user interface and data access challenges.
- Have complete control over multiuser access to virtually any database format.
- Build and distribute applications with the Microsoft Access Developer's Toolkit.

If you find you are unable to attend the seminar for any reason, please call us at (800) 531-7971 Monday - Friday, 6:30 a.m. and 5:30 p.m. Pacific Time to cancel your reservation. Your registration fee will be 100%-refundable if you cancel your reservation by <5 working days prior to seminar date>. If you cancel on or between <4 working days - 1 working day>, a \$50 fee will be retained and the balance refunded. If you do not call to cancel your registration prior to <seminar date>, and do not attend the seminar, there will be no refund.

Thank you for your interest in the Microsoft Access 2.0 Developer's Seminar. We look forward to seeing you.

Microsoft and Microsoft Access are registered trademarks and Windows is a trademark of Microsoft Corporation.

.7 Confirmation Letter (Invoice)Template

<Today's Date>

<Customer ID Number>

<First Name> <Last Name>

<Company>

<Address1>

<Address2>

<City>, <ST> <Zip>

Dear <Mr./Ms.> <Last Name>,

Thank you for registering for the Microsoft Access® 2.0 Developer's Seminar. This letter serves as confirmation of your personal reservation.

Our records indicate that we have not yet received payment in the amount of \$299 U.S. funds for this seminar. Payment is required prior to the seminar. Please call (800) 531-7971 to provide credit card information, or if paying by check,

please mail check immediately to: Microsoft Access 2.0 Developer's Seminar 490
Boston Post Road Sudbury, MA 01776.

A seat has been reserved for you for the following seminar date, time and
location:

Month, day, 1994

9:00am - 4:30pm

Hotel / Location

Hotel Address

City, ST Zip

**To make registration quick and easy, please arrive 30 minutes before the
seminar and use this letter to check in.**

In this one-day technical demonstration and lecture, you'll learn how to develop
professional database applications from scratch using the innovative features of
the new Microsoft Access 2.0. The seminar focuses on techniques and knowledge
you can put to use immediately. You'll learn how to:

- Quickly create powerful database applications for Windows™.
- Use Wizards to build highly interactive forms and easily create complex reports.
- Use Microsoft Access Basic to give you full control over user interface and data access challenges.
- Have complete control over multiuser access to virtually any database format.
- Build and distribute applications with the Microsoft Access Developer's Toolkit.

**If you find you are unable to attend the seminar for any reason, please call
us at (800) 531-7971 Monday - Friday, 6:30 a.m. and 5:30 p.m. Pacific Time
to cancel your reservation.** Your registration fee will be 100% refundable if you
cancel your reservation by <5 working days prior to seminar date>. If you cancel
on or between <4 working days - 1 working day>, a \$50 fee will be retained and
the balance refunded. If you do not call to cancel your registration prior to
<seminar date>, and do not attend the seminar, there will be no refund.

Thank you for your interest in the **Microsoft Access 2.0 Developer's Seminar**.
We look forward to seeing you.

Microsoft and Microsoft Access are registered trademarks and Windows is a trademark of Microsoft
Corporation.

SESSION IS FILLED

USE WHEN TALKING DIRECTLY WITH REGISTRANT OR LEAVING A MESSAGE

Hello. This is _____(first name) calling from Microsoft Corporation to remind you of the (name of seminar/conference) to be held _____(mm/dd/yr) at _____(time am/pm). at _____(location address, city). The Seminar/Conference begins promptly at _____(time am/pm); we ask that you arrive 20-30 minutes early to check-in.

Thank you and enjoy the Workshop/Conference!

SESSION IS OPEN

USE WHEN TALKING DIRECTLY WITH REGISTRANT

Hello. This is _____(name) calling from Microsoft Corporation to confirm your registration for the (name of seminar/conference) to be held _____ mm/dd/yr, at _____(location, address, city) at _____ time am/pm. The Workshop/Conference begins promptly at time am/pm; we ask that you arrive 20-30 minutes early to check-in.

There are additional seats available at this seminar/conference. If you know of anyone interested in attending this seminar, we would be happy to register them now.

Thank you and enjoy the Seminar/Conference!

SESSION IS OPEN

USE WHEN LEAVING A MESSAGE

Hello. This is _____(name) calling from Microsoft Corporation to confirm your registration for the (name of seminar/conference) to be held _____ mm/dd/yr, at _____(location, address, city) at _____ time am/pm. The Workshop/Conference begins promptly at time am/pm; we ask that you arrive 20-30 minutes early to check-in.

There are additional seats available at this seminar/conference. If you know of anyone who would be interested in attending, please have them call 1-800-xxx-xxxx to register.

Thank you and enjoy the Seminar/Conference!

Seminar Materials

While a variety of materials can be produced for a seminar, the following materials represent an effective mix:

- **Name badges** for attendees, the presenter, and special guests make people feel more comfortable. Name badges are recommended if you are hosting an all-day seminar with interaction among the attendees.
- **Attendee materials** should include brochures on your company, price lists, and appropriate data sheets. Seminar evaluation forms should be included as well. Don't forget to have plenty of business cards on hand.
- **Give-aways or raffles** are an excellent way to create enthusiasm for the seminar and to encourage attendees to turn in evaluation forms, if used. (Collect attendee business cards and raffle off product, training, and so on.)

.1 Evaluation Forms

We distribute one-page evaluation forms to the audience in the attendee packets to capture additional profiling information. This information is used to generate sales leads (name, address, phone, title, etc.) and to capture an attendee's program-evaluation information and initial impressions of the presenter and seminar. This evaluation also helps determine if we attracted the correct target audience according to their "buying power" and how the seminar met their information needs. The evaluation form provides a great deal of information on the attendee's profile and the success of a seminar program, including:

- A profile of the participants
- Their product usage preferences
- Ratings on the effectiveness of the seminar and the value of the presenter
- Comments and suggestions

These forms are collected at the conclusion of the seminar, providing immediate feedback on the effectiveness of the seminar.

To encourage people to complete the evaluation form, our presenters frequently refer to the evaluation form throughout the seminar. In addition, offering attendees a "special-offer form," a product coupon, or a small "trinket" in return for the evaluation increases the likelihood of gathering a large number of the evaluations from the attendees.

From time to time, we also use an auxiliary feedback form when launching a new seminar type. This allows us to determine if the content needs immediate attention for revision.

These evaluation answers are entered into a database by a vendor and we are able to generate reports from this database. In addition, we upload these evaluation records to the US RegBase to better segment our regbase records.

.2 Customer Questionnaire (Template)

Customer Questionnaire FCUS

Thank you for taking the time to complete this questionnaire. This information is used to improve our seminar programs.

Your Name _____ Daytime phone _____
Company/Organization Name _____ Fax number _____
Address _____
City _____ State / Prov _____ Zip _____ Event Date _____

1. Did the seminar meet your expectations?

A. Yes B. No

If no, why?

Please rate the following attributes of today's event:

(Circle one response per attribute)

Poor Fair Good Very Good Excellent

2. Value of the information presented in the seminar?

1 2 3 4 5

3. Speaker's ability to communicate material

1 2 3 4 5

4. Your impressions of Microsoft prior to today's seminar?

1 2 3 4 5

5. Your impressions of Microsoft after today's seminar?

1 2 3 4 5

6. How did you hear about this Microsoft event? (choose one only)

A. Invitation by mail addressed to you D. Microsoft Newsletter

B. Personal invitation from Microsoft Representative

E. Word of mouth/invitation passed on to you

C. Newspaper advertisement F. Other

7. For what type of Organization do you work? (1)

(choose one only and print choice in box to right)

A. Chemical M. Financial - banking

- B. Computer hardware and/or software reseller N. Financial - investment services
- C. Education - K-12 O. Insurance
- D. Education - community college P. Legal
- E. Education - higher Q. Manufacturing
- F. Education - campus resellers/bookstores R. Pharmaceutical
- G. Engineering S. Press (Media)
- H. Government - civilian T. Software developer
- I. Government - DOD U. Systems integrator/ consultant/ trainer/vertical applications reseller
- J. Government - state/local V. Other business/industry
- K. Health and medical services W. Not employed/retired
- L. Financial - accounting

8. Approximately how many employees work for your entire Organization/company? (choose one only) (2)

- A. 1-20 D. 101-500 G. 2,501-5,000
- B. 21-50 E. 501-1,000 H. 5,001-10,000
- C. 51-100 F. 1,001-2,500 I. 10,001+

9. What type processor does your IBM/IBM Compatible PC use ? (3c)

- A. 8086/8088 C. 80386 E. 80586/Pentium G. MIPS
- B. 80286 D. 80486 F. Alpha Y. Other

10. Where do you use your personal computer? (choose one only) (5)

- A. At work C. Both at work and at home
- B. At home D. At home for a business operated out of my home

11. How many IBM/IBM Compatible PCs are there in your area of influence? (check one only) (3b)

- A. 1 - 20 C. 51 - 100 E. 501 - 1000 G. None
- B. 21 - 50 D. 101 - 500 F. 1,001+ Z. Don't Know

12. Who do you purchase software from currently?

- A. Software Chain E. Direct from the manufacturer
- B. Store that primarily sells hardware F. Centralised department within your company
- C. Large Computer Superstore Y. Other
- D. Mail order from a catalogue

13. Are you employed full - time or part-time either outside the home or in a home-based business ?

- A. Yes B. No (skip to question 16)

14. Please read the job responsibilities outlined below and indicate the one job description which best fits the following statement:

It's my primary, #1 job responsibility or the primary, #1 job responsibility of people who directly report to me to:... (please check one and only one of the 6 descriptions below):

Note: When considering your answer, select the one job responsibility below on which success in your current job is based, and which depends either on your own skills and abilities or the skills and abilities of those directly reporting to you.

Primary Job Responsibility (Choose only 1)

- A. ...design, develop, or test computer HW or SW
- B. ...sell computer hardware, software or computer services
- C. ...create computer information system strategies, plans or designs for an entire company, subsidiary or division
- D. ...publish computer industry information and trends as an editor, writer, researcher, industry or financial analyst
- E. ...provide computer system implementation, user support or computer education such as training or documentation
- F. ...NONE OF THESE APPLY TO ME (Skip next question)

15. Considering your primary job responsibility, are personal computers & software included in any of the work you do or systems you work on ?

- A. Yes B. No

16. Which of the following statements best applies to you?

- A. I have input into the decision to acquire new software to be used by me and

used by others in my company

B. I have no input into the decision to acquire new software for myself or others

C. I have input into the decision to acquire new software for my PC only

17. Which of the following statements regarding PC software best describes your communication with others? (check one only)

A. On average, I give more advice to others than I receive

B. On average, I receive more advice from others than I give.

18. Are you interested in making a Microsoft software purchase as a result of today's seminar ?

A. Yes

B. No

19. Do you intend to purchase any of the Microsoft products featured in the seminar?

A. No

C. within 60 days

E. within 6 months

B. within 30 days

D. within 90 days

20. Do you intend to recommend any of the Microsoft products featured in the seminar ?

A. No

C. within 60 days

E. within 6 months

B. within 30 days

D. within 90 days

COMMENTS (i.e, what did you find most/least useful about the seminar?)

7. FOLLOW-UP AND MEASUREMENT

After the seminar, two crucial functions remain:

- **Follow-ups** to ensure that attendees are taking the desired next step
- **Measurements** to gauge the effectiveness of the seminar and learn how to improve future seminar marketing efforts

Follow-up with Seminar Attendees

Because seminars are really a means to an end, it's important to follow up with attendees, not only to thank them for their attendance but also to further the relationships with these customers. Often the seminars raise questions in attendees' minds that require resolution. Attendees need information about "what is the next step" to help them either purchase or implement Microsoft products/solutions.

Types of follow-up include:

- Sending thank-you letters to all attendees.
- Sending "sorry-you-couldn't-make-it" letters to registrants who weren't able to attend, providing them with the seminar information and an opportunity to talk with a representative.
- Giving reminders of offers that were made at the seminar.
- Sending additional product literature to attendees.
- Arranging one-on-one meetings with attendees.
- Conducting a telephone sales effort to overcome barriers to purchase and facilitate adoption.
- Enlisting a third party to contact "qualified" leads who attend your event.

Your first follow-up with seminar attendees should be within the first couple of days after your seminar. Microsoft SPs and Resellers should enlist a third party to follow up on leads, assist them in evaluations and purchase, and report back to Microsoft on customer's level of interest and post-seminar activity. The information presented will still be fresh in their minds, and they should have a good understanding of how your product, support, solutions, and or third-party services can benefit them.

By working one-on-one with customers, you will be able to communicate personalised benefits (adapted to the needs of that particular individual) to

complement the general advantages and features that the customer saw at the seminar.

You should use an evaluation form to obtain attendee profiling information to help in sales follow-up efforts.

.1

Sample Follow-up Letters

We have included sample follow-up letters in this section.

<Today's Date>

<First Name> <Last Name>

<Company>

<Address 1>

<Address 2>

<City> <State> <Postcode>

Dear <Mr./Ms.> <Last Name>,

Thank you for attending Microsoft Corporation's **Making the Move Seminar** featuring the Microsoft® Windows™ operating system and Windows-based applications. We hope you found our seminar valuable in meeting your needs.

The Microsoft family of applications for Windows includes:

- Microsoft Access® the new database for Windows.
- Microsoft Word which makes it easy to create great-looking documents and features WordPerfect help so your WordPerfect users can continue to be productive and learn the Microsoft Word commands at the same time.
- Microsoft Excel which enables you to manipulate and analyse your paid claims data that accumulates in our auditing systems' data files. This spreadsheet application can present this information visually with over 90 different chart types. And Microsoft Excel also has a tool called Chart Wizards which leads you through all the steps necessary to create great-looking charts and graphs.

We're prepared to sit down with you and analyse your computing needs and goals. Then we can help you implement a long-term strategic solution that starts meeting your needs today. We'll be calling you to arrange a convenient time.

Once again, thank you for attending our seminar.

Yours sincerely,

<Account Manager Name>

Account Manager

<Today's Date>

<First Name> <Last Name>

<Company>

<Address 1>

<Address 2>

<City> <State> <Postcode>

Dear <Mr./Ms.> <Last Name>,

Thank you for attending the Microsoft Corporation and our company's seminar featuring the Microsoft® Windows™ operating system and Windows-based applications. We hope you found our seminar valuable in meeting your needs.

The Microsoft line of applications for Windows features:

- Microsoft Access® the new database for Windows.
- Microsoft Word which makes it easy to create great-looking documents and features WordPerfect help so your WordPerfect users can continue to be productive and learn the Microsoft Word commands at the same time.
- Microsoft Excel which enables you to manipulate and analyse your paid claims data that accumulates in our auditing systems' data files. This spreadsheet application can present this information visually with over 90 different chart types. And Microsoft Excel also has a tool called Chart Wizards which leads you through all the steps necessary to create great-looking charts and graphs.

We're prepared to sit down with you and analyse your computing needs and goals. Then we can help you implement a long-term strategic solution that starts meeting your needs today. We'll be calling you to arrange a convenient time.

Once again, thank you for attending our seminar.

Yours sincerely,

<Account Manager Name>

Account Manager

How to Measure Your Seminar's Success

As with all marketing efforts, measuring success of a seminar is critical. Measurement allows you to compare projected goals with actual results, gain critical feedback from seminar attendees, and obtain information that will allow for refinements for future seminars.

To accurately and consistently measure seminar activity for corporate, field, and international seminars, a specific set of measurement criteria has been established. This criteria model outlines areas of measurement and provides recommendations and tools to measure key seminar success factors.

Seminar measurement information can be divided into numerous categories. For our model, we have broken it down into five major groups. Within these categories are the key items we wish to measure.

Category	Topic
Promotion	Response rates, attendance information, attendee expectations, seminar invitation
Customer profile data	Audience targeting/customer taxonomy (IEU, fringe, GBU), company size, hardware and software usage, industry, technical knowledge, attendee information needs
Seminar presentation	Presenter ratings, content validation
Logistics	Attendee materials, site dynamics, registration, overall logistics rating
Programmatic results	Overall seminar rating, intent to purchase, recommendation, satisfaction with Protech Australia, competition, follow-up, seminar offer, seminar framework tools, seminar objectives success stories

Measurement Tools

Measurement helps compare projected goals with actual program and sales results, so refinements can be made to future seminar efforts. Overall, you want to measure the results of each seminar by measuring:

- 1) Seminar Program Impact on Purchase Behaviour or Attitude Changes:** an attendee's purchase and recommendation activity, image of MS, and to what degree the seminar influenced their purchase decision.
- 2) The Level of Influence (or buying power) of Your Target Audience and an Evaluation of the Seminar Program:** an attendee's customer taxonomy profile and how they influence purchase or recommendation, presenter skills feedback, value of the information presented, and whether it was a positive or negative seminar experience.

Of the many types of follow-up and measurement methodology available, we've found that the combination of attendee evaluation forms, post-follow-up telephone surveys, and focus groups are most effective in getting the information needed to gain the information above and understand how you have done in reaching your objectives.

Controlling Costs

We are able to control costs while still obtaining accurate measurement by measuring each seminar type based on information needs. For example, our marketing research group recommends conducting phone surveys to a random sample of 200 attendees, but we have had good results in some cases by contacting only 100 attendees from each seminar type.

Another way to control costs is to measure only the information you need to know in order to evaluate the seminar results and make future business decisions. Ask yourself in what ways will any piece of information contribute to improving the seminar.

If your measurement budget is tight, use evaluation forms as your primary measurement. Evaluation forms offer the greatest measurement information for the least cost. They are effective in capturing key customer information, product usage preferences, and the effectiveness of the seminar; plus, this information can be used to generate sales leads.

Remember, measurement should be designed around where you want the customer to be in the purchase cycle at the end of the seminar (i.e., trial stage at the end of Windows NT seminars, adoption/evangelism at the end of Visual Basic or purchase/recommendation at the end of MS Office).

Evaluation Form

We distribute one-page evaluation forms to the audience in the attendee packets to capture additional profiling information. This information is used to generate sales leads (name, address, phone, title, etc.) and to capture an attendee's program evaluation information and initial impressions of the presenter and seminar. This evaluation also helps determine if we attracted the correct target audience according to their "buying power" and how the seminar met their information needs. The evaluation form provides a great deal of information on the attendee's profile and the success of a seminar program, including:

- A profile of the participants
- Their product usage preferences
- Ratings on the effectiveness of the seminar and the value of the presenter
- Comments and suggestions

These forms are collected at the conclusion of the seminar, providing immediate feedback on the effectiveness of the seminar.

To encourage people to complete the evaluation form, our presenters frequently refer to the evaluation form throughout the seminar. In addition, offering attendees a “special-offer form,” a product coupon, or a small “trinket” in return for the evaluation increases the likelihood of gathering a large number of the evaluations from the attendees.

From time to time, we also use an auxiliary feedback form when launching a new seminar type. This allows us to determine if the content needs immediate attention for revision.

These evaluation answers are entered into a database by a vendor and we are able to generate reports from this database. In addition, we upload these evaluation records to the US RegBase to better segment our regbase records.

Focus Groups

AVERAGE COST OF MEASUREMENT

Type of Measurement Tool	Average Cost
Evaluation Compilation and Reporting	\$91 per seminar (200 evals)
Telephone Follow-up and Reporting	\$5,000 per 100-person survey
*Focus Groups	\$5000 per focus group

Focus groups provide a forum for open-ended questions and provide more qualitative than quantitative information. Focus groups are an effective measurement tool for ongoing seminars of the same type where changes are made to a seminar based on key focus group results. Also, pilot programs should use this kind of qualitative measurement to make sure the seminar is clearly communicating the intended message and to provide good content validation.

Focus groups are conducted by an outside firm, usually with Microsoft observing behind a one-way mirror. It is important to use an experienced market-research company to conduct focus groups, as accurate, unbiased data is difficult to obtain in this kind of setting.

Sample focus group questions include:

- Why did you (do you) purchase (intend to purchase) the product? Or why not?
- What was the most valuable part of the seminar? The least valuable?
- What did you really get out of the seminar (the key marketing take-away messages)?
- How did the seminar meet, or not meet, your expectations?

Results from focus groups provide ideas on how to improve the quality of the seminar experience. If the sample of attendees is spread out geographically, in-depth telephone surveys can be used to obtain much of the same information, as do focus groups.

Our initial focus groups for pilot programs usually occur after the first 4 seminars, with members present from each session. By including attendees from 4 different seminar sessions, we are able to collect data from a more random sample of attendees.

Return on Investment (ROI)

Determining ROI is based on an Incremental Return Model. This type of measurement factors in the influence level of the attendees, program costs, research sample size, research respondents who purchased key products, the median/mean number of copies purchased, and the per-unit margin of those key products. It calculates the incremental return on the seminar program and can be one more factor in helping you compare different seminars and determine if that seminar type is worth the MS investment.

Post-Questionnaire Survey

We work with an outside vendor to conduct telephone surveys to track seminar results and to measure the effect seminars have on behaviour and attitude changes — specifically on purchase/recommendation or intent to purchase/recommend. We contact attendees in the 30–45 days after the seminar because we have determined this is the average time it takes a customer to purchase through their business or company purchasing department.

Follow-up surveys allow us to track:

- Where the customer is in the purchase cycle
- The type of attendee (Non-user, End-user, or Computer Professional, etc.)
- Their level of influence
- Where they purchase product
- Any incremental purchases
- Whether they have or will recommend product

We conduct surveys using closed-ended questions to measure quantitative results, instead of open-ended questions (which provide more qualitative feedback). We recommend using an outside research firm to conduct surveys, as people are more willing to give honest answers to an independent firm. Also, it is better to contact a random sample of the audience (100 participants), rather than contacting every person from every seminar.

We have discovered that it is very difficult, if not impossible, to isolate the effect of a seminar directly on the purchase of product. Attendees may have been influenced by other marketing efforts such as advertisements, press reviews, tradeshow, etc. prior to attending a seminar. Thus, we will always be determining a “soft” measure (not a “hard” or definitive sales measure) that is still important to assess as we evaluate the success of a seminar in relation to other marketing events.

In the past we have conducted both pre- and post-seminar surveys to try to gauge a change in attendee behaviour or attitude that occurred as a result of the seminar and which lead attendees to make a purchase or recommendation decision. This was highly costly and did not produce any useable results.

Calculating ROI

Because it is impossible to determine as a “hard” measure how much product was purchased as a result of the seminar, you need to calculate ROI as a “soft” measure, in the form of a range of values. To achieve this ROI range, you will need to perform two calculations: one using the median units purchased and the other using the mean.

- The median number of copies purchased is the conservative calculation. We have discovered through research that 1 unit should always be used for this value.
- Next, you'll calculate ROI using the mean units purchased. By using the mean (or average) number of copies per attendee purchased you are calculating a less conservative incremental return (i.e., the median was 1 unit but the mean may be 8 units).
- Research suggests you must obtain a minimum sample size equal to or greater than 25 values (purchase responses) to calculate the mean; otherwise use 1 unit as your value.
- You must obtain purchase information from a phone survey because of its quantitative value.
- The true incremental return on a seminar is somewhere between the median and the mean.

Key Information Needed

Number of Attendees (entire population size) or the Research Sample Size (multiplied by a factor to reach the population size) You can either calculate using the customers who actually attended the seminar or a research sample size (depending on how “scientific” you want to be); either way it should be calculated out to reflect the entire population size.

Percent of respondents who purchased key products equals the percentage of people out of the number of attendees or research sample who purchased product.

Mean number of units purchased is the average number of units purchased. (note: to pull the average or median closer to a “true” average you can drop the top 10% of responses and the bottom 10% of responses).

Median number of units purchased is the middle number; when you have an even number of responses, you'll need to average the two middle numbers. Many times in seminar measurement this value is 1 unit.

Per Unit Variable Margin equals the standard Variable Margin on a product (a calculation of price/SRP Minus Cost of Goods).

Program Costs equals the marketing dollars spent including the program's fixed costs.

Level of Influence in purchase decisions (3 pt. scale) Asked in a phone survey question (Example: How much did the seminar influence your software purchase or recommendation decision). Use: 100% of the values of the people who gave it "a great deal" 50% of the values of the people who gave it "somewhat" 0% of the values of the people who gave it "not at all"

Median or Mean Incremental Return on Seminar Program Calculations:

Total Population	x *Percent Purchasers	= Total Population Purchasers
Total Pop. Purchasers	x **Mean or Median Number of Copies	= Total Unit Purchases
Total Unit Purchases	x Unit Variable Margin	= Total Variable Margin
Total Variable Margin	- Total Program Costs	= Incremental Program Margin
Incr. Program Margin	/ Total Program Costs	= Incremental Return on Program

*Include 100% of those individuals and corresponding units who say that the program influenced their decision "a great deal"; Include 50% of those who say the program influenced their decision "somewhat"; Do not include anyone who says "not at all" to the influence question.

**Substitute Median for Mean to calculate

Example: let's say we were calculating ROI on a MS Office seminar.

Key information:

- Out of a seminar of 300 people, the research sample included 100 people (project sample to population = 3x)
- Out of the 100 people in the research sample, 30% purchased product = 30 purchasers

Purchase values Mean & Median Mean & Median given number of purchasers

EVENT INFLUENCED "A GREAT DEAL" — Use 100% of values

10 Purchasers 25; 20; 10; 4; 3; 1; 1; 1; 1; 1(Top 10%/bottom 10% = take out the 25 and last 1 values) Mean = 5.1Median = 2.0 Mean = 5.1 x 10 purchasers = 51 unitsMedian = 2.0 x 10 purchasers = 20 units Mean Units = 51 x "3" = 153 unitsMedian Units = 20 x "3" = 60 units

EVENT INFLUENCED "SOMEWHAT" — Use 50% of values

15 Purchasers 100; 50; 15; 13; 6; 6; 5; 4; 3; 1; 1; 1; 1; 1 (Top 10%/bottom 10%
 = 100, 50, 1,1) Mean = 5.5 Median = 4.5 Mean = 5.5 x 7.5 purchasers =
 41 units Median = 4.5 x 7.5 purchasers = 34 units Mean Units = 41 x "3" = 123
 units Median Units = 34 x "3" = 102

EVENT INFLUENCED "NOT AT ALL" — Don't include any values

Total Mean number of units purchased = 276 units

Total Median number of units purchased = 162 units

Per Unit variable margin = \$70

(If more than one product, do all calculations for each product; also there will
 be a standard unit variable margin published in FY'94)

Program costs = \$8,000 for the seminar

Mean Calculation:

Step #1 100 x 30% = 30 total population purchasers
 Step #2 In chart above = 276 total unit purchases
 Step #3 276 x \$70 = \$19,320 total variable margin
 Step #4 \$19,320 - \$8,000 = \$11,320 incremental program
 margin
 Step #5 \$11,320 / \$8,000 = 1.42 incremental return on the
 seminar

Median Calculation:

Step #1 100 x 30% = 30 total pop. purchasers
 Step #2 In chart above = 162 total unit purchases
 Step #3 162 x \$70 = \$11,340 total variable margin
 Step #4 \$11,340 - \$8000 = \$3,340 incremental program
 margin
 Step #5 \$3,340 / \$8000 = .42 incremental return on the seminar

ROI is then somewhere between .42 to 1.42 on your investment. So, at the higher
 end of the range for every dollar you spent on the seminar you gained .42 on your
 investment.