

# **SEMINAR PLANNING GUIDE**

V1.0

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# 1. Introduction

## 1.1 Background

*This guide was originally written as a proposal for a Boston area professional society, which will be referred to as “the Society”. Most of the items discussed are applicable to other organizations.*

The Society has undertaken a major review of the existing seminar program with the goal of revamping the program so that the seminars become financially successful. It is recognized that significant changes are needed in marketing and promotion of the seminars. However, it is vital to remember that marketing and promotion can greatly enhance the success of a good product – but can not make poor or mediocre products into winners.

A product may be defined in a vacuum with little or no customer research and then “thrown over the wall” to sales and marketing with the assumption that these organizations just need to “do their thing” to make it successful. In some cases this works. In most cases the product does not meet market needs or expectations and the marketing organization is left with “putting lipstick on a pig.”

This means that it is vital to consider the whole product – the whole customer experience – not just “the thing in the box”. The customer experience includes the seminar itself, handouts, venue, meals, service (registration, etc.), the overall “feel” of the day’s experience, promotion and messages, and connection with other Society activities.

Successful products – successful seminar programs – require both a good core product, packaging the product to meet market needs, and an effective program of promotion and support.

## 1.2 Key Questions

There are several questions that we need to ask – and answer! – for each potential seminar:

- Who would attend this seminar? What is the target market definition?
- How many prospects are there for this seminar? What is the size of the target market? We need to be doing ongoing market research to gauge interest and opportunity for different subjects.
- Why would someone attend this seminar? Why would someone give us \$300-\$600+ and a full day or two of their time?
- What is the benefit, in customer terms, of attending this seminar?
- Is this the best available choice for a seminar?

## 1.3 Seminar Approach

As the seminar program is a major investment of time, money and resources by the Society and has a major financial impact on the Society, we should treat the seminars as *products* and apply a (somewhat) formal product development process to them. There are two likely results

from this approach: First, more effort will be required up front in the selection and definition of the seminars. Second, the seminars are more likely to be successful.

## 1.4 Goals

Key questions include what we are doing, why we are doing it, who we are doing it for, how are we doing it, and desired outcome.

### 1.4.1 *Why Are We Doing This?*

### 1.4.2 *What Are We Doing?*

### 1.4.3 *Who Are We Doing It For?*

### 1.4.4 *How Are We Doing It?*

### 1.4.5 *Desired Outcome*

## 1.5 Product Definition

This will include a product definition phase which will define the target market, develop a set of ideas to evaluate,

# 2. Marketing

The four foundations of marketing are **Product, Price, Positioning and Promotion**.

## 2.1 Product

Assuming the product category is “seminar”, what are the details of this specific seminar? What is the topic, subject matter, presenter, goals, handouts, venue, and any other elements that may be significant to attendees. What is *unique* about this seminar?

## 2.2 Price

What is the price for the seminar? What is the value of the seminar? What is included in the price? How does the price compare to alternatives?

## 2.3 Positioning

What is the target audience – technical, management, marketing? What is the level of content? What are the prerequisites? How does this seminar compare with others? Is this a budget seminar or a luxury seminar? What are the alternatives to attending this seminar (including doing nothing)? Why choose this seminar over the alternatives, including doing nothing? What are the associations of attending this seminar (emotional level associations)? Is this an elite seminar or a “working stiff” seminar? Will people be in *over their heads or under their heads*?

## 2.4 Promotion

What elements are in the promotional mix? What is the marketing plan, what is the promotional budget, and who is responsible for each element?

A rule of thumb for marketing is that it requires five to seven *touch points* with a prospect to get them to make a purchase decision. A *touch point* is an interaction with a prospect where they receive and recognize (in other words don't ignore) a message. A touch point is typically an advertisement, direct mail piece, email, personal contact or other form of directed interaction.

The next critical factor is the *conversion rate* – the percentage of prospects that can be persuaded to make a purchase decision. The conversion rate can vary dramatically depending on the target market, the product, the cost of the product, and other factors. Conversion rates can range from a small fraction of 1% (typical of spam) to nearly 100% (highly qualified prospects who are already pre-disposed to a purchase decision). Direct marketing has traditionally had a 1%-2% conversion rate, although higher conversion rates can come from qualified prospect lists.

If we make favorable assumptions of 5 touch points for a decision and a 5% conversion rate, we will need 100 touch points for each person attending a seminar. A seminar attendance of 200 people can be expected to require 20,000 touch points. If the conversion rate drops to 2%, we will need 50,000 touch points to get 200 attendees.

See *Chapter 4. Promotion* for details on the ways we propose to implement these touch points.

## 3. Seminar Product Plan

The seminar product plan is a formal document that defines the seminar, the people responsible for executing it, and planning and operational details. It should be considered a contract by the people putting on the seminar and should be formally approved and signed off by the Society.

While it is a living document which will change as the seminar proceeds through development and execution, the core definition and financial model should remain intact. Any changes to the core definition will need formal approval.

### 3.1 Project Team

We need to identify a **project leader** who has the authority to make decisions and commitments to execute the seminary program. This person will need to be supported by a team to handle logistics and specific tasks. The project leader is responsible for the success or failure of the seminar. They will need to be carefully chosen and enthusiastically supported.

### 3.2 Seminar Definition

Defines what the seminar is, topics to be covered, scope, duration, size and similar elements.

### **3.3 Goals**

What are the goals of the seminar? Includes number of attendees, revenue, expenses, visibility, and advancement the Society. If there are any additional goals such as addressing minorities in computing, handicapped access, or establishing relationships with specific companies or universities, they would also go here.

### **3.4 Key Contacts**

The people responsible for the seminar. Includes registration, logistics, speaker contact, and spokesman.

### **3.5 Budget**

All anticipated expenses, both fixed and variable. Includes financial analysis, breakeven analysis, and sensitivity analysis (what if attendance is +/- 20% of projected number?).

### **3.6 Abstract**

Traditional abstract of the seminar. Includes details on topics to be covered, key points, and insight into what will be learned.

### **3.7 Speaker Bio**

Standard speaker bio. Establishes credibility and experience. Includes publication history. Includes photograph of speaker and any other relevant photographs.

### **3.8 Background Information**

Information on how the seminar topic fits into the industry, useful facts, who is using it, competitive approaches, success stories, recent articles, relevant Web sites or Blogs, international developments, etc.

### **3.9 Target Audience**

Who are we trying to reach? Define a profile of the person who should attend, including the benefits they would receive and how to reach them.

### **3.10 Key Messages**

#### ***3.10.1 Content Messages***

The easy one – what will be covered in the seminar and what are the key lessons from the seminar. Includes at least 5 messages; 10-20 messages would be good, as we could use different messages in different places. A large number of available messages also allows us to focus on the most important ones.

#### ***3.10.2 Benefit Messages***

The important messages – what benefits you receive from your investment (time and money) in attending the seminar. Make as concrete and hard-hitting as possible. These are the messages that we will focus on promoting. Again, at least 5 benefits.

### 3.11 Logistics

A complete set of logistics information and schedules, including dates, times, venue, venue contacts, meals, AV, handouts, registration and cost.

## 4. Promotion

Promotion has been identified as a major need in making the seminar program successful. This is currently a preliminary section that addresses a number of promotional tools that we can implement.

The basic model is to create or capture a large block of information up front and then abstract it and package it for multiple distribution channels. The primary source of this information will be technical experts and the presenters.

These technical experts should work with the marketing team to craft a set of messages. This is best done in working meetings; the approach of pointing the marketing team to a website or book and asking them to absorb the information and create the messages places a large burden on the marketing team. Also, marketing is likely to miss important points or craft misleading messages without the benefit of direct insight and feedback from the technical experts.

### 4.1 Promotional Copy

A series of messages need to be crafted. These include a detailed write-up as well as a set of 3-5 smaller, complementary messages. The detailed write-up would go in the Reflector as a half-page or full page ad, on the Reflector Web site, and on the GBC/ACM Web site. It might also be used for posters or flyers

### 4.2 Graphics

Graphics add great impact and attract attention. We should include charts and diagrams, illustrations and pictures wherever possible. The graphics should be designed for use in both color and B&W. We should include pictures of the speaker, book covers, graphic abstracts of magazine articles, and “relevant” pictures (people, products, building, etc.).

### 4.3 Seminar Logo

For the Deep AJAX seminar we produced a distinctive logo. This proved very effective, and was used as a identifying and unifying element across the entire seminar project. Because of the impact of an effective logo it is vital to design one as early as possible.

The Deep AJAX logo was a straightforward 3D text design, which can be readily adapted to other seminars. If we choose to do this, the “look and feel” of this design can become a unifying visual element for the Society seminar program.



Figure 1: Deep Ajax logo.

## **4.4 Promotional Vehicles**

Once the promotional copy and graphics have been prepared they will be packaged and distributed through a variety of promotional vehicles. Since the goal is to achieve a minimum of 5-7 touch points per person, the same messages will be delivered multiple times through multiple vehicles.

### ***4.4.1 Meeting Announcements***

We should make brief announcements at all available forums, including Society meetings, other professional society meetings, and any other meetings that Society steering committee members attend. A script should be prepared so that the presenter can appear professional and convey all critical information. Handouts should be available with seminar details. We should try multiple vehicles for these handouts, including full color postcard and business card formats.

### ***4.4.2 Real Times***

We should have a 1-2 page article for each seminar, running the three months before the seminar. In addition to an announcement/abstract format containing the details of the seminar we should also have an article in the form of speaker interview or an article by an expert in the field. This article would introduce the topic and contain messages about the benefits of attending. The advantage of the article is that it can be more informal and can convey a human touch.

### ***4.4.3 The Reflector***

The Reflector is one of our major communication vehicles. A half-page or full-page ad style announcement should be placed, as well as a brief abstract. This should be done in each of the three months before the seminar. The Reflector and the IEEE Boston Section website contain essentially the same information. (This item is specific to Boston area computer related activities; you will need to find similar organizations in your area.)

### ***4.4.4 IEEE Boston Section Website***

Full seminar details should be provided on the IEEE Boston Section website. Their Courses section has an excellent format for presenting course information. (This item is specific to Boston area computer related activities; you will need to find similar organizations in your area.)

### ***4.4.5 Society Website***

Full seminar details and online registration should be provided on the Society website.

The seminar announcement should be a “mini web site” within the Society website. It will be multiple pages, will have substantial graphics content, and will be designed as a promotional and marketing vehicle for the seminar. A model of what we want to do is User Interface Engineering. See their website at [www.uie.com](http://www.uie.com) and look for the User Interface Conference. UIE has been doing this for years, knows what they are doing, and are successful.

#### **4.4.6 Email**

We should do at least three rounds of emails. The emails should be at one month intervals starting three months before the seminar. Each email should be different, focusing on a different element of the seminar. The emails must be brief and must focus on customer benefits.

The email list or lists needs to be examined. The best way to use email is to include links to rich content as a combination of embedded pictures and Web links. This will require a server with the appropriate content loaded before any email blasts go out.

#### **4.4.7 Flyers**

8.5 x 11 flyers are a promotional mainstay. They should be graphically designed and include full information. They should be printed on colored stock, probably green or yellow. Flyers can be printed for \$0.03 each with very quick turnaround times. If done in color, Kinko's charges \$0.40 - \$0.50 per copy.

For the Deep AJAX seminar, flyers were heavily used. These flyers had a distinctive design, contained messages and information, and encouraged quick reading. They were designed to attract interest and provide just enough information to send people to the Web site for full details.

Because the flyers were cheap and easy to customize, we produced multiple versions containing discount codes. These offered discounts for specific groups, such as NEJUG.

It is difficult to overstate the importance of having effective flyers.

#### **Post Cards or Business Cards**

Business cards are inexpensive. Color business cards with printing on the back can be done for \$50 per thousand or \$60 for 2,000 (VistaPrint). Color postcards (5.6" x 4.33") cost \$110 for 1,000 (VistaPrint). Either of these formats has good impact and can hold considerable information. In addition they are easy to carry and make good take-away items.

#### **4.4.8 Direct Mail**

Direct mail, using a folded flyer or a postcard format, can be a good tool for getting attention. More planning and discussion is needed.

Cost of direct mail is \$0.40-\$0.50 per piece. This is the total cost, including printing, addressing, handling and postage. It does not include mailing list costs, which will need to be addressed separately if we choose to purchase a mailing list. See the chapter on postcards for details.

#### **4.4.9 Posters**

Kinko's can print 11 x 17 color posters for \$1.60 each. We should experiment with the impact of placing high-impact posters on company and school bulletin boards.

#### **4.4.10 Signage**

Kinko's can print signs up to 3'-5' wide for \$8.00 to \$15.00 per square foot. Pricing depends on paper, backing and lamination selected. These are full color signs printed on inkjet printers.

A 18" x 24" poster, mounted on foamcore, costs \$75. These should be printed on glossy media – we tried paper, and it did not have the visual impact that glossy media does.

#### ***4.4.11 Networking***

Personal contacts are extremely powerful. Everyone involved with the seminars should be fully aware of the details and take advantage of opportunities to mention it to other people. We will need to provide people with a script, business card or postcard announcements, and a standard email message.

#### ***4.4.12 PR***

Part of the planning package should include press releases. We need to determine where these press releases can be placed.

In addition to press releases we should prepare case studies, stories, and arrange interviews.

#### ***4.4.13 Magazine Articles***

Magazine articles are a high impact, very credible, low cost vehicle. Unfortunately, it is difficult to determine exactly when articles will appear and they have a long lead time. Magazine articles are best used as an overall awareness vehicle for the Society and to drive people to the web site for current information.

#### ***4.4.14 Newspaper Advertising***

In addition to press releases we can consider placing ads in newspapers. This section needs further development.

#### ***4.4.15 Radio Advertising***

Although very mass market, radio advertising can be effective. We should explore demographics of local stations and spot costs. Radio advertising should be explored as a growth vehicle after we have successfully implemented other promotional vehicles.

#### ***4.4.16 Television Advertising***

Like radio, television can be effective. This is more likely to be cable channels than major channels, but still presents an interesting opportunity. If we have members with the proper skills, we could consider developing targeted video content for both cable TV and for inclusion on our web site.

#### ***4.4.17 Corporate Connections***

We need to explore ways to both reach corporations and to use them as a vehicle to reach their employees. This section needs further development and is an area where the Society officers and board can play a vital role.

#### ***4.4.18 University Connections***

We need to explore ways to both reach Universities and to use them as a vehicle to reach their faculty and students. This section needs further development and is an area where the Society officers and board can play a vital role.

## 5. Website

A custom website dedicated to the seminar should be developed. This is simply a directory on the Web server – each seminar goes in its own directory or subdirectory. The Web developer has read/write access to this directory and can easily update this seminar website. The seminary website is linked too from the front page of the SocietyM site.

For the Deep AJAX seminar, a custom website was developed in DreamWeaver. This site used a 3-column layout, with targeted messages in the sidebars and the main content in the center column. The site ended up containing 3 pages – the main page, a dedicated page for directions and parking, and a registration page (linked to Acteva).

Since the seminar website actually lived outside of the regular Society website, it was easy to provide limited access to it through a password protected directory. The Web developer was able to quickly and easily make modifications in DreamWeaver and then directly upload them. At some points, the site was being changed several times a day.

The combination of seminar specific page design, content and graphics was well received.

Note: the Deep AJAX site was a first effort. The basic design elements worked well, but the visual appearance could be improved. It might also be worthwhile breaking the main page into multiple pages, with separate pages for agenda, speaker bios, etc.

The Deep AJAX site was a straightforward CSS site, with all content and design elements self contained. It can easily be edited using DreamWeaver or by hand editing. A new seminar site can easily be created by copying and editing the Deep AJAX site.

## 6. Postcards and Direct Mail

Full service mailing houses can print and mail from electronic submissions at low cost with quick turnaround.

For the Deep AJAX seminar we used PostCard Services ([www.postcardservices.com](http://www.postcardservices.com)). A custom 4color design was created, submitted online, and mailed to 4,500 people. The cost of this mailing (printing, postage, handling) was \$1,740.

Postcard Services has templates which can be used for custom designs, and accepts pdf files. We prepared a full custom design (in CorelDraw), featuring background, logo and messages. We chose B&W for the address side, which also contained custom messages.

The process is to login to the Postcard Services website, fill out a form with order details (quantity, size, printing information, mailing services needed, etc.), and upload the artwork files (pdf). They then create an electronic proof which is a pdf file containing exactly how the front and back of the postcard will look plus an authorization page. The authorization page must be signed and all 3 pages faxed or mail back. No work is started until they have the signed proof sheet. Note that a new proof sheet is produced for each job, even if you are using existing artwork. Thus, there is no time savings for repeat jobs, so you might as well customize each job.

Plan for one week leadtime from Postcard Services. It will require 2-3 working days from submission of files to availability of electronic proof, 1-2 days for approval of the proof, and 3-4

days for printing and delivery to the post office. If this time is included in the schedule, the system works well.

We also used Postcard Services to print 1,000 postcards which were delivered in bulk to the Society to hand out. This cost ~\$0.21 each, which is reasonable for full color collaterals. Plan 10 days for this process – the proof and printing process takes 3-5 days, and shipping is either ~5 days or very expensive.

## **7. Acteva Registration**

## **8. Seminar Timeline**

### **8.1 Overview**

This is a draft project plan for a Society seminar. While the actual dates will change for other seminars, the timing is intended to remain the same. This sample is intended to show the activities and timing/sequencing of activities. It is not an actual plan; for example, The Reflector and the Real Times do not publish July or August issues.

### **8.2 May**

All details of speaker, date and location need to be settled. Messages and high level plan completed. Production of first round marketing materials completed.

### **8.3 June**

Execute first round of marketing. Begin production of second round marketing materials.

#### **8.3.1 *Email Blast 1***

Initial email. Brief overview and link to Web site.

#### **8.3.2 *Web Posting 1***

Place the first round information on the GBCACM web site. Includes preliminary information, including subject, dates, location, pricing and discount schedule.

#### **8.3.3 *Reflector 1***

First announcement of seminar in The Reflector. (Note: need deadline.)

#### **8.3.4 *Real Times 1***

First announcement of seminar in Real Times. (Note: need deadline.)

#### **8.3.5 *Postcard 1***

Postcard with high level messages and link to Web site.

### **8.4 July**

Execute second round of marketing. Begin production of third round marketing materials.

**8.4.1 Email Blast 2**

Second round email. Include case study and benefits as well as link to Web site.

**8.4.2 Web Update 2**

Provide additional details. Provide case study. Provide benefits with details. Include more detailed speaker information and agenda. Try to encourage people to register now.

**8.4.3 Reflector 2**

Place a detailed seminar announcement in the Reflector. (Note: need deadline.)

**8.4.4 Real Times 2**

Place a detailed seminar announcement and a case study in the Real Times. (Note: need deadline.)

**8.5 August**

Execute third round of marketing. Begin production of final round marketing materials.

**8.5.1 Email Blast 3**

Third round email. Include a new case study and additional benefits as well as link to Web site

**8.5.2 Web Update 3**

Update with more reasons to attend. Structure to build excitement and sense of urgency.

**8.5.3 Reflector 3**

Place a detailed seminar announcement in the Reflector. May be repeat of previous announcement. (Note: need deadline.)

**8.5.4 Real Times 3**

Combination of story and logistics information. Coordinate with Web site, should be Web story with fewer details. Could include speaker interview.

**8.5.5 Postcard 2**

Second round postcard mailing. Emphasize early registration discount deadline.

**8.6 September****8.6.1 Email Blast 4**

Send out final email with deadlines one week before seminar.

**8.6.2 Web Update 4**

Update web site with latest information.

**8.6.3 Reflector 4**

Final detailed seminar announcement in the Reflector. (Note: need deadline.)

**8.6.4 Real Times 4**

Final detailed seminar announcement in the Real Times. (Note: need deadline.)

### **8.6.5 Seminar**

Deliver the seminar!

### **8.7 Post Seminar**

A set of follow-up tasks should be done as quickly as possible after the seminar. The Web Site report should go up the week after the seminar – it would be ideal if it can be written during the seminar.

#### **8.7.1 Follow-up Email to Attendees**

Combination of thank-you, links to additional information, special offers and note from speakers. Should go out one week after the seminar.

#### **8.7.2 Follow-up Email to List**

Brief report and link to Web Site to regular email list. Goal is to show them what they missed and get them to attend future seminars.

#### **8.7.3 Web Report**

Full report of seminar with pictures, highlights and available materials on Web site.