



*scf*university

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client appreciation
events

cli E nts in V ite serv E relatio N ship sa T isfaction tru S t

Client appreciation events are a great way for you to build loyalty among existing clients.

They provide you with a venue in which you can thank clients for their business—building their trust and cultivating relationships with them. Events can also indirectly serve as an effective prospecting tool in your financial practice. These events can build energy and buzz among existing clients which, in turn, motivates them to tell friends and colleagues about the event—and about their relationship with you. A successful event—whether large or small—will leave a lasting impression that can result in stronger client loyalty and increased revenue.

7 keys to success

keys to a successful event

There is no perfect formula for a client appreciation event. The event's success will largely depend on your ability to identify the event's objectives. As you plan the event, spend time in these seven key areas.

Identify your objective. What do you hope to accomplish (referrals, good will, etc.)?

Know your budget. Develop a budget for the event and work to stay within those boundaries.

Select the right event. What event will attract and resonate with clients? Remember your event budget as you develop ideas.

Invite the right clients. Who should be invited? How will you get them there? It is important that you send invitations well in advance so clients can make plans to attend.

Pay attention to detail. What needs to be planned to execute the event flawlessly?

Convey your appreciation. What can you say to clients at the event to truly express your appreciation for their continued business?

Follow up. Follow up with those who attend and let them know how much you enjoyed the time you spent with them.

event ideas



Golf Event

A golf event is a classic type of event that can generate competitive camaraderie and a fun atmosphere for clients of all ages. Simply plan an evening of group lessons with a golf professional at a local course or driving range. For a more involved event, organize a full tournament and host an awards dinner or cocktail party afterward.



Throw a Party

Parties can be scaled to accommodate large and small groups. Smaller parties can be hosted in your home or office and can foster a warm, personal atmosphere in which you can really spend quality time with clients. For large groups, you can rent a venue, cater the event, and even hire a band.



Art Gallery Showing

This type of event will help you minimize cost as artists and gallery owners are always looking to open their venues to increase exposure to their art. Add an extra touch by serving wine and hors d'oeuvres.



Wine Tasting

Organize an event for eight to ten couples. This can be a wonderful way to get to know clients in an intimate, sophisticated atmosphere. The real bonus with wine events is that wine not only appeals to the upper socio economic demographic, but financial planning and wine naturally go together.



Family Movie Night

Rent a single movie theatre for a family movie night. Before the movie begins, the theatre staff will display your logo on the silver screen while you address your clients and thank them for their business. Provide popcorn, candy, and soda—and the whole family will enjoy their evening out together.



Family BBQ and Picnic

Rent space at a local park and barbecue hot dogs, hamburgers, and the like. Incorporate clients' families by planning games and friendly competitions. An egg toss, a three-legged race, or a watermelon-eating contest are a few classic examples that can appeal to clients of all ages.



Sporting Event

Take clients to a local game and leave a great impression on sports fans. Purchase a block of tickets in a specific section at a hockey match. Rent an executive suite at a triple-A baseball game. Professional sporting events can get expensive, but there are ways to make it happen and achieve the same result.



Shredding Event

Rent a shredding truck for four hours around the end of tax season. Invite clients to bring old documents to shred. You can also hand out Identity Theft Prevention tips as an added value.



Casino Night

Hold this type of event at a banquet hall or local casino. Donate the proceeds to charity and use your own promotional items as awards.

a few extra tips

- Be sure you personally engage with clients during your event. Delegate tasks so you can focus on engaging in comfortable, relaxed interaction with your clients.
- Hire a photographer to take candid photos during the event. Send photos to clients in a thank you note after the event. They will appreciate it. And, of course, you can use these photos in your office and in future marketing materials.
- During events that incorporate food, remember to accommodate clients with special dietary needs.
- For large scale events, it is a good idea to use an event planner. Professional planners often have vendor relationships that can cut event costs.
- If you choose to host an event that includes alcohol, it is a good practice to limit yourself to one or two drinks. Your own personal conduct is a direct representation of your business.
- For outdoor events, always have a backup plan that allows for bad weather.

promotional items

Consider providing clients with promotional items at your event. T-shirts, coffee mugs, embossed golf balls, pens with your logo, or custom notepads are a great way to help the experience continue far beyond the actual event. It provides them with a tangible item that serves as a reminder of the event and your relationship with them. While the event is designed to appreciate and thank clients for their business, it is also a marketing tactic. As such, distributing promotional items during the event is a great way to promote your brand, leave a lasting impression, and solidify relationships with those clients in attendance.

» Keep Your Event Compliance-Approved

Anytime a product is discussed or a vendor or product provider helps cover the costs of your event, it is necessary for you to work with our compliance department in the planning stages of the event. In those cases, additional review and paperwork may be required. If you have questions, please contact the compliance department.



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