

## Developing Seminars That Bring in Business

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Seminars for clients and potential clients are becoming increasingly more popular as a business building tool. They are a way to serve clients and potential clients as you demonstrate your expertise and consulting skills. The service and value provided, of course, depends on the quality of the seminars. When done well, they enhance your reputation and bring in business; but when done poorly, they hurt your reputation and hinder business. Here are a few tips for conducting seminars that will win clients' appreciation and business.

***Target topics toward specific audiences:*** During tax season, you took a comprehensive look at the financial condition of your clients and gained a wealth of knowledge to tap into when choosing pertinent topics for particular audiences. Different organizations have different needs and perspectives so don't try to address all their needs in the same session. Succession planning may be vital for family owned businesses while income allocation may be critical for physician groups. After tax season, review your client files and determine what topics would be most suitable for specific clients. Perhaps you were thinking ahead and made notes during tax season about the needs and interests of various clients. Either way, now is the time to act on your knowledge of your clients' situations.

***Tailor your content to the audience:*** All topics have some basic underlying principles, but a generic, one-format-fits-all won't work. Rather than have a general seminar open to anyone, develop specific seminars for specific audiences. A seminar "Understanding Financial Statements for Contractors" would be more valuable from the client's eyes than "Understanding Financial Statements." If you're addressing contractors, you must use contractor language and examples; if you're addressing non-profits, you must use their language and examples. Your clients are interested in their situation and industry, not those of others. It may take more time to prepare multiple versions of a particular seminar, but the credibility you gain is well worth it. People will notice your customization and will draw conclusions that you truly understand their world.

***Limit PowerPoint:*** PowerPoint has some excellent benefits, but it is also the source of many dreadfully dull, try-your-patience seminars. Too often PowerPoint drains seminars of their life and vitality. The best seminars engage the participants through structured interactions, and PowerPoint limits interaction. It also detracts from your goal of building relationships with your participants; they end up focusing more on the screen than on you. Why would you want them to do that? To avoid the PowerPoint mediocrity trap, think of it as the visual aid it is, not as the presentation itself. It plays the same role a flipchart or overhead projector—just in a jazzier way. Use PowerPoint to support you and your message; don't let it replace you or dull down your message.

***Develop Dual-Purpose Materials:*** Seminar materials serve two purposes: they engage participants during the seminar, and they provide a reference guide afterwards. Thus, you must balance how much information to have written out with what they must do to stay involved. If everything you say is written out, there is no reason for them to be in a room with you face-to-face. If the material is too sketchy, it makes it difficult for participants to grasp the concepts. Make your materials interesting and easy-to-follow; include graphics and charts; and connect them to individual and group work. Don't forget, the materials go back to their offices with them so you want them to refer to them often and remember where they got them.

***Simplify, simplify, simplify:*** Accounting topics are complex and most people, other than accountants, don't understand them very well. That's why seminars can be such a valuable business building tool. If you can take something complex and overwhelming and turn it into something understandable and enjoyable, your credibility will soar. Few, if any, clients and prospective clients want a thorough understanding of complicated tax laws or cumbersome details about accounting procedures. What they do want is an understanding of how they can make their businesses more profitable and their lives less stressful. They want to know how cost segregation, estate planning, or business valuation can benefit them and what they must do to reap those benefits. Give them enough to chew on but don't choke them with too much detail. Genius is in simplicity.

With tax season winding down, it's time to set sights on ways to leverage the knowledge and relationships tax season brings. Seminars are an excellent way to do this and summer and fall are ideal times for them. They can enable you to highlight the consulting aspects of your firm while providing a valuable service to your clients and prospective clients. Just remember, it's the quality of your seminars that will make the difference. Target specific topics to specific audiences, tailor your content to each audience, limit your use of PowerPoint, and keep it simple. If you do, you'll reap the benefits of client loyalty and more business.