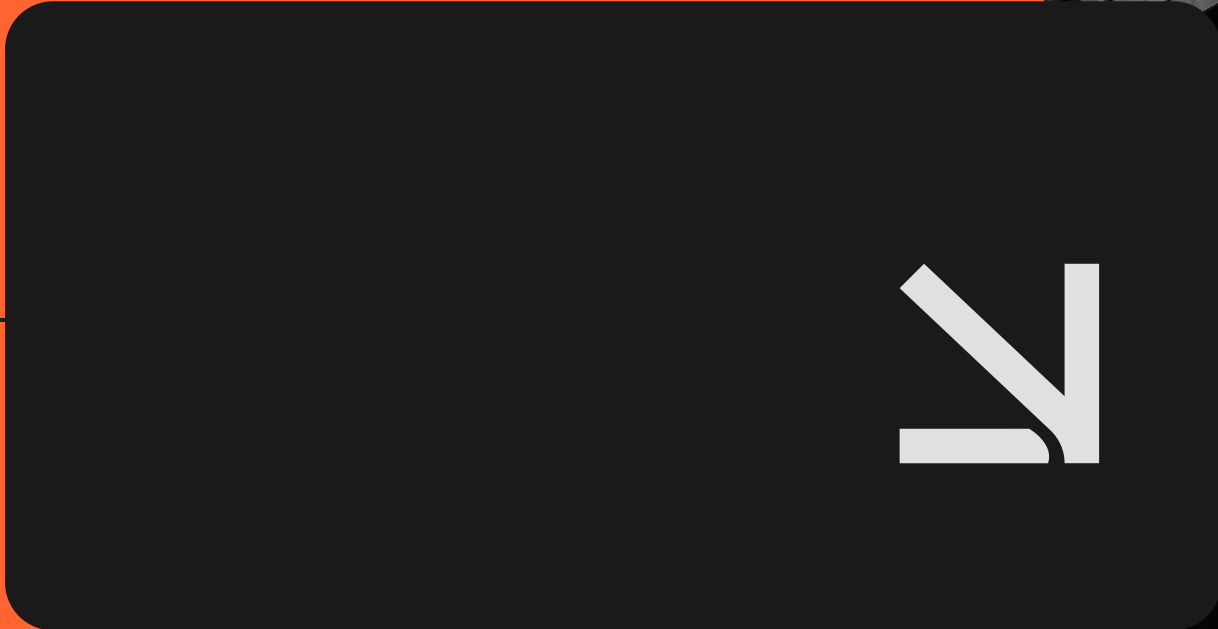


Charlie Van Derven's
Guide to

DELIVERING IMPACTFUL WEBINARS

THAT CONVERT

for Financial Advisors



CHARLIE VAN DERVEN

MARKETING CONSULTANT

3 REASONS WHY WEBINARS MATTER

**1**

Client & Prospect Education and Trust Building: Webinars educate clients about financial complexities, establishing the advisor's authority and credibility.

**2**

Marketing & Brand Building: Position yourself as a thought leader and authority. The simple invitation is impactful, even if they don't attend.

**3**

Lead Generation: You're nurturing 100s or 1000s of prospects. The webinar allows them to self-select as ready for a deeper conversation.

DRAFT A COMPELLING WEBINAR TITLE

Keep it short, impactful, and relevant. It should capture the essence of the topic and make the audience want to attend.

Examples:

Money Matters: A Comprehensive Guide to Financial Wellness After Divorce
529 Plans Demystified: How to Leverage Tax-Advantaged Savings for College
Maximizing Tax Efficiency in Early Retirement: Strategies for Keeping More
Closing the Year Strong: Essential Financial Moves Before December 31st



THE DESCRIPTION

01
Start with a powerful opening sentence.

02
Clearly outline topics that will be covered

03
Mention key takeaways or benefits of attending

04
include details about the speaker/expert presenting the information





UPLOAD DETAILS

ZOOM, WEBEX, ETC

SET UP

- Set the date, time, and duration.
- Ensure you have a reliable internet connection for the live event.

MATERIALS

- Upload any pre-recorded segments or presentation materials.
- Use clear and attractive artwork for the webinar platform, emails, and social posts.





BUILD EVENT

ON LINKEDIN

USE THE "EVENTS" FEATURE ON LINKEDIN

- Use the "Events" feature on LinkedIn.
- Add the webinar title, description, and relevant imagery.
- Mention the event date, time, and how to register/join.
- Promote the LinkedIn event in your posts and articles on the platform.



EMAIL COMMUNICATION

**1****First Email (One week prior):**

Introduce the topic.
Highlight the importance/relevance.
Share the date and registration link.

**2****Second Email (One day prior):**

Reminder about the event.
Share any preparation tips or materials.
Offer a calendar link to save the date.

**3****Post-Webinar Email:**

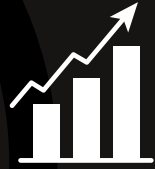
Thank attendees for their presence.
Provide the replay link.
Encourage feedback and share details about upcoming events.



INVITATIONS



- Use LinkedIn's search and filter tools to identify the right 1st tier target audience.



- Invite up to 200 connections to attend the webinar each day.



- Social Advisors recommends a 2 week (10 business day) invitation process, allowing you to invite up to 2,000 connections to attend.



SOCIAL MEDIA PROMOTION

- 01**
Create eye catching graphics and short videos.
- 02**
Use relevant hashtags and mention speakers and participants.
- 03**
Schedule consistent and unique posts across all platforms.
- 04**
Engage with comments, likes and shares to boost visibility.





WEBINAR DELIVERY

BEST PRACTICES

TECHNICAL

- Check audio/video/internet.
- Check presentation tools.
- Rehearse session.

AUDIENCE

- Use polls.
- Q&A sessions.
- Encourage chat participation.

DELIVERY

- Dress appropriately.
- Maintain good posture.
- Minimize distractions.
- Maintain positive energy.
- Keep water within reach.



POST- WEBINAR FOLLOW UP



- **Feedback:** Send out a feedback survey or form to gather insights and areas of improvement.
- **Networking:** Engage with attendees on social media, thank them for their participation, and connect for future collaborations.
- **Analyze:** Review metrics like attendee numbers, drop-off rates, and engagement levels to refine future webinars.

POST WEBINAR EMAIL

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SAMPLE EMAIL

Subject: 🚀 Catch the Replay! Your Exclusive Webinar Resources Inside 📁

Hi [Name],

Wow, what an incredible webinar we had! 🌟 If you missed it or just want to relive the magic, we've got you covered. Here's the link to access the webinar recording: [Webinar Replay Link]

As a token of appreciation for joining us, I want to offer you some FREE resources that I believe will add immense value to your journey:

- [Resource 1 Title & Link]
- [Resource 2 Title & Link]
- [Resource 3 Title & Link]

Feel free to dive in and explore these materials at your own pace.

🎉 Exclusive Offer for You 🎉

As a thank you for being a part of our webinar, I'm excited to extend a special opportunity your way. For the next 72 hours, I'm offering an exclusive 20% discount on my consulting services. This is your chance to supercharge your strategy and achieve remarkable results with personalized guidance.

Ready to take action? Just reply to this email or reach out at [your contact details] within the next 72 hours to lock in your discounted rate.

Looking forward to the opportunity of working together and seeing you excel.

Best regards, Charlie Van Derven

PS: Remember, success favors the action-takers. Don't miss out on this chance to elevate your [industry/topic] game and grab a deal that's too good to resist!

1. Warm Greeting and Thank You

2. Webinar Recap

3. Webinar Recording Link

4. Free Resources

5. Exclusive Offer Introduction

6. 20% Discount Details

7. Benefits of Consulting Services

8. Urgent Call to Action (CTA)

9. Testimonial or Case Study

10. Contact Information

11. Unsubscribe Link

12. Social Sharing Links

13. Personal Signature

14. Postscript (PS) for Urgency or
Benefit Reminder

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FINAL THOUGHT



20%+

20-40% of webinar attendees turn into qualified leads.

20%+

higher lead conversion rates.

50%

Increase engagement around your business.

30X

Webinar attendees are 30 times more likely to convert into clients.

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LET'S CONNECT!



Meet Charlie Van Derven He has been instrumental in propelling advisors to new heights within the financial sector for longer than he wants to admit.

Charlie's expertise lies in helping advisors carve their unique path. Through his guidance, financial advisors discover their authentic voice and connect with their ideal audience, setting them apart in a competitive landscape.

With a strategic approach, Charlie has not only enhanced their messaging and targeted focus but also fostered consistent growth.

His impact continues to transform the advisory landscape.



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