

Prospecting Workshop: Audience and Location

For most small businesses, “workshop” conjures up the image of an expensive event providing little of actual value beyond a free dinner. This paper offers an alternative intended to change that perception.

Ideas

Here are a few tips to consider when planning a prospecting workshop.

1. Target Audience

Think of groups with members or participants who fit your ideal client profile. If your expertise is working with small business owners, consider the following:

- Chamber of Commerce, Start-up Meet-ups and Rotary Club. SCORE (Service Corps of Retired Executives) is a must. They hold regular events. [Learn more here.](#)
- If you have local banks and credit unions without financial advisory services, approach them about events. They have the relationships to fill up a room (and provide one, too).

Maybe your specialty is working with retirees. Some groups to consider here include:

- Municipality senior centers, Red Hat clubs, corporate and organization retiree luncheons and events, and Google retiree events in your area. You’ll be surprised what is available.
- Check into career centers and colleges as most offer courses on personal finances (or they should). They regularly seek outside experts to present to their students.

2. Locations

You can host a highly impactful event in a location that won’t break the budget.

- Banks, credit unions, libraries, meeting halls, municipal buildings and schools.
- Often your target audience to whom you’ll be presenting may supply the venue.

For these events, your office is not the best choice. Always select a neutral location.

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