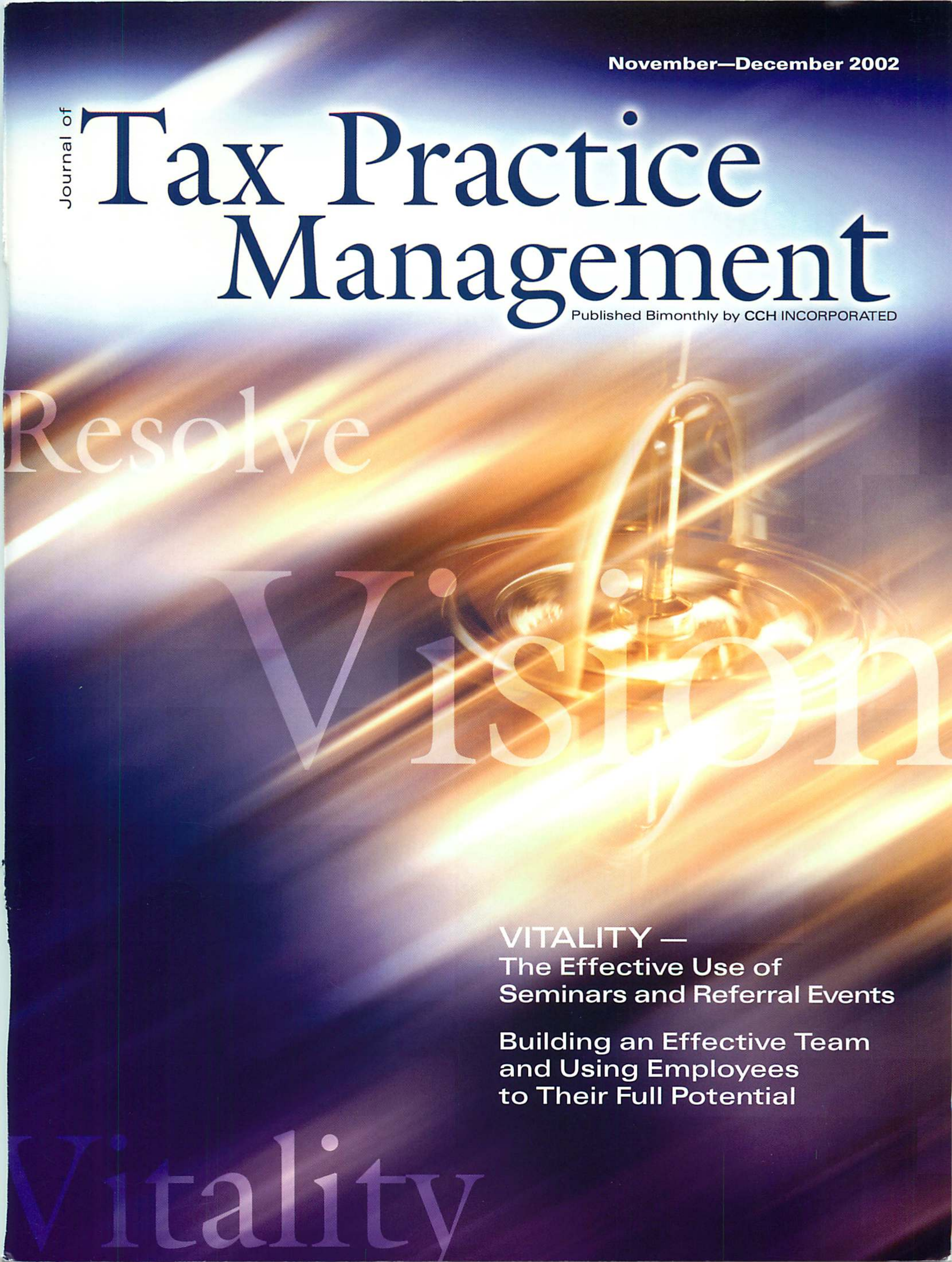
November—December 2002

Journal of Tax Practice Management

Published Bimonthly by CCH INCORPORATED



**VITALITY —
The Effective Use of Seminars and Referral Events**

Building an Effective Team and Using Employees to Their Full Potential

Seminars: Are They a Thing of the Past? Keys to Successful Credibility Building and Educating in a Saturated Marketplace

By
D. Michelle Golden

Michelle Golden explores how to keep seminars attractive with a market that is saturated and time-restricted, explaining that firms must have a plan, have an expected outcome, measure against it and, above all, allow adequate time and resources to plan.

Keeping seminars enticing in a saturated and time-restricted marketplace is a challenge almost all accounting firms face, regardless of their size, geography or target market. Many firms also find it difficult to determine if their seminars are a worthwhile investment of practice development time and dollars.

I have interviewed several firms and combined the results with my 10 years of experience in the CPA marketing industry to provide some discussion on what works and what doesn't when it comes to seminars in the new millennium.

Seminars Are in a Nationwide Slump

The problem is widespread. Firms of all sizes in all parts of the United States are modifying their marketing plans by cutting seminars altogether, trimming all but the most successful programs, or letting their seminars evolve into less traditional formats that they feel better meet their objectives. How these firms define success is important, and we'll cover that below, but it is important to acknowledge the symptoms we are witnessing in the market today.

Lisa Koczera of Massachusetts-based Rosenfield Raymon Restivo, PC, captures the feeling among accounting firm marketers when she observes, "A recent estate planning seminar offered by a large law firm here drew only about 12 people in a hotel

D. Michelle Golden is the President of Golden Marketing Resources, Inc. in St. Louis, Missouri.

ballroom with a buffet that was planned for at least 100. This particular firm has offices all over the world, a huge marketing budget, great collaterals and is very well respected. When they can't get a respectable showing, I think it says something about the marketplace's interest in this kind of activity."

It's not just the east coast that notes these trends. Firm after firm told me similar stories. Some marketers candidly attributed poor attendance to weak content, bad seminar timing and, sometimes, unfocused objectives with the "ideal attendee" undefined.

Almost all respondents told me that the least successful seminars, and the ones they either cut or plan to cut, are general—such as tax law changes or other theory-based presentations. "We don't do any general tax type events because the attendance is usually next to nothing," says one marketer. Another confided, "Our less successful seminars were broad, almost philosophic in nature. No matter where we had them—fun place or not—turnout was never high enough to justify the cost."

A Saturated Marketplace

High-level professionals—the decision-makers and credible referral sources you want to reach—have been over-saturated with seminars from professional service firms of all types over the last decade or so. Let's face it, if you and I consider our time too valuable to spend at nonessential seminars, why would other, possibly busier, business people make time for them.

The audience we want already receives huge quantities of invitations from every medium of communication: postal, e-mail, fax and phone. Everyone we do business with, and their competitors, every organization or association we belong to, plus many of the Web sites we land on, offer seminars. They can't all be good. And they are not. But how do we choose? We can't even go to all the programs that look interesting because there are simply too many seminars and too little time. If that is how we feel, think about those whom we are inviting!

Many firms are guilty of putting on seminars that they will admit were sub par. Unfortunately, in the 1990s, there was a large number of seminars "to help businesses" put on by professional services firms. Often these were hastily prepared or presented by inexperienced speakers. Many programs were thinly veiled sales pitches where value for the time spent was noticeably undelivered. The high-level professionals who attended such seminars naturally concluded that attending seminars put on by such firms was not the highest and best use of their time.

While this explained some historic drop in attendance, many firms quickly learned from their mistakes and corrected these flaws. Yet attendance is still in a slump.

Key causes for poor turnout seem to be:

- dull content;
- topics that aren't critical to today's pains;
- unclear agendas;
- similar presentation by competitors; and
- logistical reasons like poor location or time of day.

Ideal time of day and location vary by audience and geographic area and are best determined by asking the prospective audience about their availability and preferences. Content is a much greater animal to get our arms around.

Content Is Key

"Folks will come out of their offices if there is some impending change to which they must respond and that they must learn about to protect themselves or their business. The more general stuff isn't as compelling," says Melinda Guillemette, consultant and former marketing director for REDW in Albuquerque, New Mexico.

We've discussed the fact that seminars based around general topics like tax changes aren't drawing crowds, but why? Lisa Koczera suggests a good very reason: "I've come to the conclusion that our clients don't want to take the time to attend seminars—they don't want to get to know tax law changes—they pay us to know." She makes a valid point: they certainly do pay us to know.

Even worse to consider, do clients perhaps perceive that our firms are trying to share tax law changes *en masse,* hoping clients will let us, their accountants, know later which ones might pertain to them? I suspect it could confuse clients and even shake their confidence in our intent to evaluate and address their needs individually. One hopes clients never experience us dropping the ball for them regarding a tax law change they learned about at our seminar.

At the root of the problem of general topics failing to appeal to large

> If your firm has put on a so-so seminar that may have scared prospective attendees from coming back, don't despair. Even if yours wasn't the greatest, there is always room to market a "new and improved" seminar to the right audience at the right time with the right agenda.

audiences, we can draw the clear conclusion that topic urgency and applicability to the audience are essential. People want to know mostly about things that will affect them in the short term and they want to know what to do about it. They want to know this as specifically as possible. Therefore, it makes complete sense to focus on very targeted attendee groups providing how-tos and training versus theory.

Despite the negative reception to general topics, many firms are enthusiastically building seminars into their 2003 strategic plans and marketing budgets. A few are even juicing up their seminar plans. The key for these firms is that they are adapting to the changing marketplace and learning from their past mistakes. Marketing directors strive to get the most practice development bang for their dollar and they agree on two things: Planning is essential—follow up is key.

Effective Seminars in the 2000s

Marketers agree—firms must stop holding seminars just to hold them. Have a plan, have an expected outcome, measure against it and, above all, allow adequate time and resources to plan. Cheryl Smyers of Stambaugh Ness, PC, in York, Pennsylvania, advises:

> If done right, seminars still can be a solid part of a good marketing plan. To be successful, they should be very targeted and a thorough process for developing, publicizing and tracking results should be used.

Setting Objectives

First, your firm needs to establish its objectives. To do this, think about what it is that your firm ultimately seeks to achieve:

- Acquire new business
- Build credibility (résumé enhancement or becoming "famous")
- Increase referrals
- Help existing clients

At this point, you may or may not know who your target audience will be.

Whether you desire to increase new business directly or simply perform a credibility building exercise, you will take a similar approach, but will have distinctly different expectations for the outcome. Either way, your approach most likely will involve selecting an area of practice (a niche) that could be an industry (*e.g.*, construction) or a service area (*e.g.*, employee benefits) in which you already have some clients or past experience, so you have a base of knowledge or expertise from which to speak. Once you determine what your target niche is, you can focus on the best way to reach the group.

> Almost all respondents told me that the least successful seminars, and the ones they either cut or plan to cut, are general—such as tax law changes or other theory-based presentations.

Similarly, to achieve the objective of increasing referrals, you will need to identify what types of referrals you wish to increase. Probably these will be referrals to a particular niche or service group. Try to think outside of the box. If you have ever kept records of the referral source for any existing clients, this is a good time to review them. Clients come from strange places and we are often surprised by the source of referrals.

Helping existing clients is an easier goal to tackle because you know who your audience *won't* be. Again, try thinking of your client base in terms of industry groups. To keep a topic relevant to your audience, you will want to avoid lumping different sorts of clients together.

Many believe the ideal seminar size is 30 or fewer attendees. A larger presentation does not indicate greater "success" and it is not conducive to the individualized attention that firm personnel and presenters can give a smaller group.

Shaping Your Topic and Deciding How to Reach Your Target Group

If you don't have a particular topic in mind yet or still need help narrowing down the niche group, try reading some industry publications pertaining to your core client industries. See if any of the topics inspire you or if there is something break-through or particularly newsworthy for your clients. For any topics you consider, ask yourself, "Would this make me want to attend a seminar if I were them?"

Michelle Class of Barnes, Dennig & Co., Ltd. in Cincinnati, Ohio, describes her topic selection process:

> We plant a marketing representative in the monthly meetings of each of our niche groups. We keep our ears open for the tiniest hint of a potential topic idea—especially an exciting new development mentioned by any client service team member.

Accounting marketers have found that certain audience types respond better to certain types of presentations than others. Groups belonging to target industry niches seem to be attending topics that provide crisis response and management solutions—sessions answering questions such as, "How will it affect me?" "What can I do to prevent it?" and "How should I prepare?" They also like presentations that are entertaining and gatherings that allow opportunities for networking with others in their industry.

Clients seem most interested in attending seminars that provide detailed training and instruction. These seminars must go beyond "teasing" with tidbits and suggesting they call the firm for help—these sessions must provide substance!

Referral source groups respond well to instructional or educational sessions, especially when delivered over lunch that you have catered in at their offices. Referral sources are also the only group you can address with, "This is who we are, this is what we do, and this is the type of referral we are looking for." Be sure to give them a turn to stand up and tell you who they are, what they do and what type of referrals they are looking for as well.

Lawyers are a popular referral source group to target. They are one of the few groups that truly appreciate tax law change briefings and they also respond well to tips on reading and understanding financial statements. In contrast to the overall decline in the number of seminars, Jen Barnum of Smith & Gesteland LLP in Wisconsin offers her firm's recent success:

> We have increased the number of tax seminars we do for attorneys and have had a great response. We drew 102 attorneys to our last seminar. We now do them three times per year.

Marketers agree–firms must stop holding seminars just to hold them. Have a plan, have an expected outcome, measure against it and, above all, allow adequate time and resources to plan.

Keep an open mind and "think big" on possible referral sources. Beyond bankers, insurers and lawyers, firms can market to bonding agents, trade and government associations, business incubators, software companies, payroll service companies, public officials, members of boards of directors and that often forgotten audience: other CPAs. Again, it's a good idea to comb through records you may have kept about where or from whom your past referrals have come for clients of the type you seek.

Be aware that you do not need to be the one to speak in order to gain recognition for your firm. For instance, a St. Louis firm I know holds an extremely popular annual seminar for its primary niche group—dentists. The firm considers it a point of pride that they don't bore their clients and prospects with accounting topics, instead they bring in other experts known within their clients' industry or motivational speakers that inspire their audience. The firm still controls the event, but with the presentation component out of the way, it is much less work for the firm and they get all the great credit for the good time that attendees have.

When determining how to reach an audience for the purpose of building credibility, it is best to try to get in front of the type of people whom your future desired prospects deeply respect. If you can present to, or in conjunction with, a trade association, relevant educational institution or other group that your future desired prospects turn to for advice, guidance and instruction, that is your best bet.

When choosing a means of reaching your target audience for the purpose of increasing new business, your objective should be to present yourself as a qualified resource and dedicated supporter to the target audience's industry. If you can include some well-served clients within your audience of prospects, it will serve you well. Many firms have found there is no better way to sell their services than to quietly sit back and let a client do the selling for them.

When selecting prospects to invite to your niche-based presentation, consider getting prospect names and contact information from industry associations. Many will even help you promote the event. Otherwise, very targeted lists can be purchased from any of several marketing list companies, including Dun & Bradstreet and American Business Lists.

It is proven time and again that small groups are more effective than large groups when it comes to increasing the opportunities for new business. Keeping your group no larger than 30 is recommended by many of the marketers who offered the benefit of their experience. This gives representatives from the firm a chance to introduce themselves to an attendee and personally gather a name to be used in future follow-up.

Event Logistics

Your firm will need to make several decisions about the presentation that may seem like minor details, but any of which can make or break the success of your event. More than a few firms have been disappointed with the poor turnout for a sunny Friday afternoon event, wondering what on earth happened to all the people who said they would be there.

Type of Meeting

Strategic decisions about who will host the event, who will present and who will promote it are key to filling the seats. Some choices are as follows:

- Hosted, presented and promoted by the firm alone
- Hosted, presented and promoted by the firm in conjunction with other professionals (bankers, lawyers, insurance, industry experts, *etc.*)
- Hosted jointly by the firm and another organization who handles most or all of the promotion (business journal, chamber, association, *etc.*)
- Hosted by the firm, but presenter is an expert outside the industry
- Hosted and promoted by professional seminar organization (Lorman Education Services, *etc.*) with one or more people from the firm as presenters

Coordinating and presenting on your own is fine, but when you work with others to produce an event, many advantages can be realized.

A few years ago, I coordinated a presentation intertwining content from a tax partner, a lawyer, an insurance broker, a psychologist and a prominent local bank. The bank formally hosted the presentation. The goal: a two-hour presentation on family business succession with each presenter speaking from his or her unique perspective. The presenters each invited between five to 10 ideal candidates for succession planning services from their respective contact lists. The presenters' synergies were evident and attendees recognized the advantage of hiring this team (who already concurred on approach and respected each other) over trying to build their own teams. The most surprising and appreciated element was the psychologist—people loved the acknowledgement of the emotional side of business succession. Within a week of the presentation, a larger regional bank approached the firm to hold a similar session in conjunction with their bank. Word traveled fast in the community and the results were excellent.

In some markets, the business journals are "going in on" seminars together with firms. It can be a great bargain because the firm sponsors the event for a fixed fee and the business journal publicizes it and handles all the logistics. The firm just needs to make sure that the purpose and the prospective attendees align with those of the business journal. The business journal or local chamber of commerce is likely to draw too broad of an audience for many firms' presentations. Producing a seminar with or through the right association instantly targets your desired audience.

Working with another group to put together your presentation can help with cost as well as credibility. Jen Barnum says:

> Smith & Gesteland has increased the number of seminars that we participate in through other associations. The advantages are that we don't incur costs and there is little to no risk to us if very few people show up.

Date, Time and Location

After deciding on your event hosts and presenters, other key decisions impacting attendees are the location, date and the time of day for your event. Obviously, you'll want to select a venue that is centrally located among the attendees. Whenever there is a choice, tend toward a venue away from peak traffic, with ample parking and adequate, attractive and comfortable conference space. If parking is not free, arrange for a voucher so attendees are not inconvenienced or surprised with parking fees.

The importance of your guests' physical comfort should not be underestimated. Cheryl Smyers offers good advice:

> Doing a seminar 'right' includes the soft, fuzzy stuff like handing out plenty of prizes, offering refreshments, mints on the tables and even a pillow for someone to use if they're having back trouble. Think of how you'd like to be treated.

The firms I interviewed, as well as marketers discussing ideal seminar timeslots in a recent discussion thread on the Association for Accounting Marketing Discussion List, all concurred that seminars lasting longer than two to three hours are a bad idea. Julie Barnes at Smith & Howard PC in Atlanta says, "Our longest seminar is two and a half hours. If they last longer, either our registration suffers or people come, but leave early."

The firms are virtually unanimous that Tuesday, Wednesday or Thursday mornings are the best time for professionals because they haven't been distracted with their workday yet. The only two exceptions noted were for elderly attendees or doctors and other healthcare professionals who all seem to prefer the 3 p.m. to 5 p.m. timeslot. For the medical profession, the preferred day is Wednesday because many offices are closed to patients that day. Some firms hold cocktail hour events, but these are less often for instructional topics than for networking, motivational or entertainment purposes. Thursday evenings are historically the best choice for a good turnout.

This suggestion won't excite many CPAs who read it, but holding a seminar during tax season can be an excellent strategic move. That is the time of year when financial issues are front-of-mind for most people, and when accountants are perceived as inaccessible. To have a firm's attention when outreach efforts are the last thing on their competitors' minds puts a firm at a real advantage. Never underestimate the power of challenging a stereotype!

Alternate Presentation Styles

A great number of firms host events that deviate from the sit-down, classroom-style seminars we often think of. A very popular approach is to hold moderated "roundtable" meetings. These consist of one, two or several tables of eight to 10 people who meet fairly regularly and discuss a designated topic—often someone from the firm moderates, but some firms swear by bringing in an outside speaker or moderator.

Early morning roundtables can be very effective for drawing elusive audiences such as contractors or manufacturers who are otherwise very difficult to pull away from their businesses. These sorts of events also offer a nicely informal opportunity to network among friendly competitors or like-kind organizations. This also appeals greatly to such groups as local governments or nonprofit organizations.

Some firms routinely hold roundtables for their key industries and few firms charge for them. In many cases, the attendees generate their own topic ideas, thus keeping their own interests renewed. It makes it easy for the firm to maintain the program's momentum when attendees are so enthusiastic that they are planning their own future events. "Before you host your first few, ask the audience what they want to hear about," offers Michelle Class. "Each year we do a survey soliciting feedback on our programs and for topics for our next year's seminars. It works great!" Barnes Dennig regularly holds small roundtable discussions for not-for-profit, construction, manufacturing and wholesale/distribution niches. The firm also brings in nationally recognized speakers annually for each of their target markets. These sessions are half-day and attendance ranges from 100–150, depending on the niche.

Julie Barnes offers excellent advice gleaned from her experience:

> Our quarterly roundtables are co-sponsored, and many outside people lead the entire session. We've had HR executives, attorneys (for fraud detection and prevention), technology companies and bankers.

She believes her firm's clients enjoy getting a perspective from someone besides their accountants, and that the clients trust their firm to get the right kind of speaker. Barnes continues:

> Most of the speakers don't charge us, since they are in a room full of potential clients, but we make it clear that the sessions are strictly for the education of our clients and are not at all a sales opportunity. This is essential to the success of the sessions; at the first sign of a sales pitch, our clients would decide never to sign up for another session.

Barnes' firm sometimes includes invitations to referral sources to join in. Since this can be risky she suggests, "We ask them to bring one of their clients that would benefit from the session. This keeps them from attending the session simply to network with our clients, and also offers us a new prospect."

Another effective format is to bring lunch in and hold the presentation at the offices of a client, prospect or referral source. Although less seminar and more client goodwill, firms often follow a brief introduction and hour of targeted information with a guided tour around the client's facility. Firms who do this cannot stress enough how valuable it has been for strengthening client relationships.

A great spin on the seminar is to invite several of your clients in, one at a time, to teach your firm's personnel about their industries.

Fee or No Fee

Whether or not to charge for your event—this logistical consideration has spawned many debates. Some firms swear by it, saying that by paying to come, attendees perceive the experience as having greater value, therefore they experience higher attendance rates. Some suggest it keeps the number of no-shows down significantly.

Firms that charge a fee usually do so for the more traditional classroom-type presentation, entertaining or motivational events, or dinner events, rather than for less formal sessions such as roundtables or lunch sessions. Charging attendees also seems to be market driven, with more firms in the Northeast, Southern California and Chicago markets charging admission. It makes sense that if competitors are giving free seminars (with success) it would not be a great idea to charge for yours.

A California firm told me, "With some of our publicly offered seminars, we publicize a fee but extend personal invitations with complimentary admission to those whom we specifically target. We also extend the complimentary invitation to any clients who wish to attend."

Plans, Follow-Up and Measuring the Outcome

A seminar without follow-up is like having a birthday party and never opening your gifts. All the work is done and the follow-up, the easiest part, is what most firms skip. Cheryl Smyers feels strongly that "a seminar without a follow-up plan is a waste of time and money." Unless your purpose is only to build your résumé, I agree wholeheartedly with Ms. Smyers.

Several firms have told me their seminars are ineffective. Or worse, some confess that they have no idea if their seminars were effective. The only way one *wouldn't* know is if one didn't set objectives, didn't follow up with attendees or didn't track either.

Ineffective seminars have many symptoms. If attendance was good, but people left early or dozed off, it may have been the result of poor presentation quality or perhaps a poor match of content to the audience. If response to the invitation was disappointing, it could have been a result of the time, day, location, promotion strategy or materials, or maybe the topic offered just wasn't as exciting to invitees as it was to the firm. If everything seemed great during the seminar, but no attendees hired the firm within the next few months, it's possible the firm didn't adequately express a call to action during the presentation or perhaps the firm failed to step through the threshold of those doors of opportunity it succeeded in opening.

> Firms that seem to have the most success are holding shorter, more focused sessions for specific niche groups.

Understanding the market and planning properly, well in advance, are essential to pulling off an effective presentation. Part of event planning, which should start months in advance, is building in a series of follow-up activities appropriate to the audience and/or related to the topic.

Setting Goals and Measuring Against Them

New Clients. Goals for your event outcome should be realistic and will no doubt involve follow-up activities if they include closing the deal with new clients as a result of your seminar.

Credibility. For credibility building, the objectives may be to "successfully present with an average evaluation score of 4.5" and to add the presentation to the presenter's curriculum vitae.

Leads. For generating leads for new business, working the room will be as important as a strong follow-up plan (*see* Tip 8, below). The measurable objective for one presenter might be to "identify and maintain contact (long-term) with 20 business owners, but identify the five 'hottest' leads within two to three months and work those leads well to obtain at least two as clients within six to nine months." Your firm needs only a simple system—easy as a spreadsheet—to track seminar attendees against new clients obtained by the firm. In the absence of a sophisticated contact management system, people responsible for working the leads will have to be trusted to do their follow-up (marketing or administration can help remind them) and will have to report on their efforts periodically in order to track progress.

Referrals. A goal of increasing referrals is the simplest to track if the firm knows how many referrals came from targeted referral groups in the past. If not, your goal will simply be a set number of referrals over a certain period of time. Be sure to track outgoing referrals too. Those whom you refer out should be returning the favor with inbound referrals. If they aren't, talk to them about it and, if need be, start sharing the names of others who do refer work to you.

Existing Clients. Increasing help to existing clients is trickier to measure. Are you helping them be more self-sufficient? Or are you helping them to understand they need to hire you for more services? If the former, you could track the number of clients who have successfully achieved self-sufficiency based on your education and training. If the latter, you would measure new fees in certain relevant categories against prior year fees in those categories. Be sure to note whether or not fees in those categories are higher for those who attended your seminar than for those who did not if you wish to determine whether your seminar was effective for increasing fees.

Tips to Enhance Effectiveness

1. Listen to your intended audience. Research and be sure content and attendees are a match. It's hard to remember sometimes because we dwell within this industry of accounting, but the things that matter to us may not matter to our desired audience. Your seminar can impart information on topics as far from finance and compliance as one can get while you are credited with delivering good stuff to your audience. Find and deliver the most relevant and interesting information you can.

2. Be clear and detailed in conference promotional materials. Be clear about your program content. I just received a lovely, professionally printed invitation to a local firm's "Annual Seminar." The invitation lists date, time and location, but omitted one small thing: The topic! My perception? "It mustn't be very important." Don't assume people know what you intend. Promote your event clearly in such a way that your preferred audience won't want to miss it.

3. Follow up with invitees before the event. After you send invitations, someone from your firm should call to confirm receipt and remind recipients to save the date. You could also send e-mail or fax reminders. An after-hours voice mail is a great way to do this. Call or e-mail again one or two days prior to the event to remind registrants that you look forward to seeing them at the seminar.

4. Deliver a memorable presentation with excellent handouts. If your potential presenters are newbies or much in need of a Toastmasters membership, putting them on the agenda for your formal presentation is a bad idea. Let them build their skills and confidence in smaller, less critical settings and bring in the experts for your seminars. If PowerPoint is used, slides should contain only key words and presenters must not read their presentations from the slides. If charts and detailed illustrations are used, make sure they are decipherable from the back of the room. If not, put them in the handouts that, by the way, are a *must* at the *beginning* of the session. Don't skimp, because good handouts are vitally important to most attendees.

5. Provide a call to action (especially if seeking new business or asking for referrals). If your seminar is on an urgent topic or discusses a technique or approach, suggest to attendees that they should review their situation (provide them some sort of tool or checklist to do so) and then contact you to obtain some sort of free analysis or advice based on the results. The analysis must provide some value and not be just a service plan with a cost estimate attached. When you do your follow-ups, you can even offer to help them with their review if they seem to be stumbling. Giving a little will lead to getting a lot.

6. Ask attendees for feedback in the form of evaluations. Program attendees appreciate the opportunity to provide quick evaluations of what they've seen and heard. The key is to be brief. Keep your evaluations to three or four yes/no or scale-rating questions and one or two open-ended questions with one or two lines for writing. People want a chance to say what they think without much effort.

7. Follow up with the people who do not attend. To everyone who did not respond, send a nice letter bullet-pointing the highlights of your event and invite them to fax back a request for handouts. Ask what sorts of topics might interest them and also ask permission to send them future invitations. For registrants who were no-shows, send them a copy of the handouts with a note that you regret they were unable to attend. Invite them to call you at their convenience if they are interested in discussing the content over a lunch or if they have any questions. Follow up with them in a week or two to make good on that lunch offer.

8. Follow up with attendees post-conference. In advance, create and send to all attendees a "follow-up piece" by mail. This could be any kind of a document: article, checklist or other aide relating to something mentioned in the presentation. If, during your event, firm members worked the room and introduced themselves to attendees, determine who will follow up with which attendees to sign this letter and to keep contact alive over time by working the leads. Avoid assigning anyone more than 15 to 20 contacts. Send occasional articles or informational tidbits pertaining to the session. Have them identify the five best leads within a short time—those leads should be people the assignee could continue conversations with over lunch. Try to touch base with them every couple of months after that. Offer to help them achieve

continued on page 56