

TOM DEANS Ph.D. AWARD-WINNING PROFESSIONAL SPEAKER

How to Host an *Every Family's Business* Seminar Featuring Tom Deans, Ph.D.

Why a seminar on business succession planning, and why now? There have never been so many aging business owners nearing retirement.

The combination of smaller families and better-educated children who have pursued careers outside the family business has created a succession crisis of epic proportions. Long, expensive retirements mean that business owners who have the majority of their wealth sitting in the retained earnings of their firm are assuming untenable risks with that wealth.

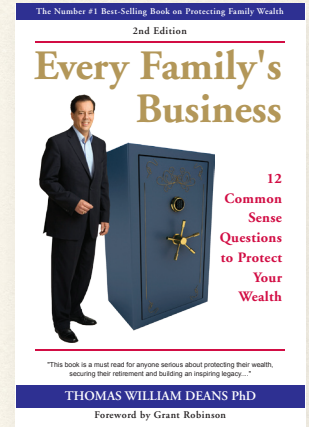
When succession planning goes well for business owners it goes well for everyone, including employees, lenders and advisors.

Timeline of Key Action Items

- 8 weeks before the event: book the room.
- 7 weeks before the event: finalize the invitation list.
- 6 weeks before the event (or earlier): distribute invitations and books to prospects and existing clients.
- 5 weeks – and then every week – before the event: call all invitees.
- 1 day before the event: call all confirmed attendees.

Planning Tips to Ensure Success

1. The seminar is designed to help advisors by delivering to their business-owner clients and prospects a thought-provoking message on the importance of business succession planning.
2. *Every Family's Business* is the best-selling family business book of all time and as its author, I'm neither licensed to sell financial products nor do I offer consulting services. Never hire a speaker unless you understand how they make their money – you are introducing your best clients to them. Truly professional speakers don't hand out business cards to their audiences nor do they include "infomercials" in their speeches. My seminar is about positioning you, the advisor, as the expert. My event provides the motivation for clients and prospects to work with their advisors without delay to implement their succession plans.
3. My seminar's message centers on the key theme of *Every Family's Business*. That's why the most successful advisors distribute copies of the book at least 6 weeks before the event. I will provide template letters for prospects and clients to accompany the book, along with a template invitation.
4. Most events are held at hotels or golf courses. The most successful are co-sponsored by a team that includes wealth management, insurance, accounting, legal and/or lending professionals. Having co-sponsors will send a clear message that advisors from other disciplines are enthusiastic about working collaboratively to design and implement business succession plans.



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5. This event is designed as a family event and attendance of clients' spouses and children as young as 14 is encouraged. This point is crucial. When spouses and children learn that they could end up owning and running a business with a large tax bill as a result of a failure to plan, the probability of implementing an intelligent succession plan is vastly improved.
6. The cost of the event includes room rental; very seldom do I see food served. Occasionally, depending on the time of the event, light refreshments may be offered – coffee, tea, water.
7. Total event time is 90 minutes, including a 30-minute reception at the beginning of the event, the 45-minute keynote and 15 minutes (on average) for a question-and-answer session. I'm also willing to lead a panel discussion after my talk (with the panel made up of the co-sponsors). This gives me an opportunity to direct questions to my sponsoring hosts and position them as the experts.
8. I am happy to sign books after my keynote address. I encourage the sponsors to participate in the book signing. It's another opportunity for me to encourage attendees to book appointments with their advisors.
9. It is important for advisors to "sticker" their books. Unlike pads of paper, pens, baseball caps and other corporate promotional items, books have a high perceived value – people hold onto them. Remember to affix a label with your firm's name and contact information to the back cover of the book, over top of the barcode. In addition, consider having your local print shop turn your business card into a bookmark – this is another excellent opportunity to brand your firm.

It is inevitable that someone in the audience will call me directly after they have read *Every Family's Business*. When they do, I will ask them who gave them the book. If you have labeled the book, I can send the reader back to you for advice. With more than 125,000 copies of *Every Family's Business* in circulation, I need readers to call their advisors, not me...so again, please label your books! If you do, I will call you and give you the name of the reader who has contacted me looking for help. If you have attended my speeches you will know that I always make it clear to my audience that I am neither a consultant nor a financial advisor.

10. I'm available to do interviews for radio, TV and print, both before and after the event. I'm experienced at working the names of the event sponsors into my interviews. This is free publicity for you and will clearly boost attendance for your event, especially among non-clients.
11. It is rare that I do only one event for an advisor. Participants often say, "I wish my husband/wife/brother/sister/business partner/friend had attended," so it's always good to announce to the audience that I will be returning in, say, six months. Your goal should be to differentiate your firm by positioning it as the go-to family business succession-planning firm in your market.
12. I encourage sponsors to offer a door prize drawn from business cards collected at the registration desk. The event will attract walk-ins, especially if I have done media interviews, and it is always helpful to have contact information for walk-ins for follow-up.
13. Follow-up is crucial. Ask attendees whether they have read the book, ask what they liked about the event, but most importantly, ask whether you can meet with them to begin talking about the implementation of their family business succession plan.
14. Keep a detailed list of everyone to whom you send a copy of *Every Family's Business*. Even if a prospect or client cannot attend your event, you can still follow up with a phone call and ask, "Can we get together and talk about the book"? Try doing that with a sleeve of golf balls!

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