21

Game-Changing Virtual Event Strategies to Spark New Business

By Maribeth Kuzmeski, PhD

Red Zone Marketing®

www.RedZoneMarketing.com

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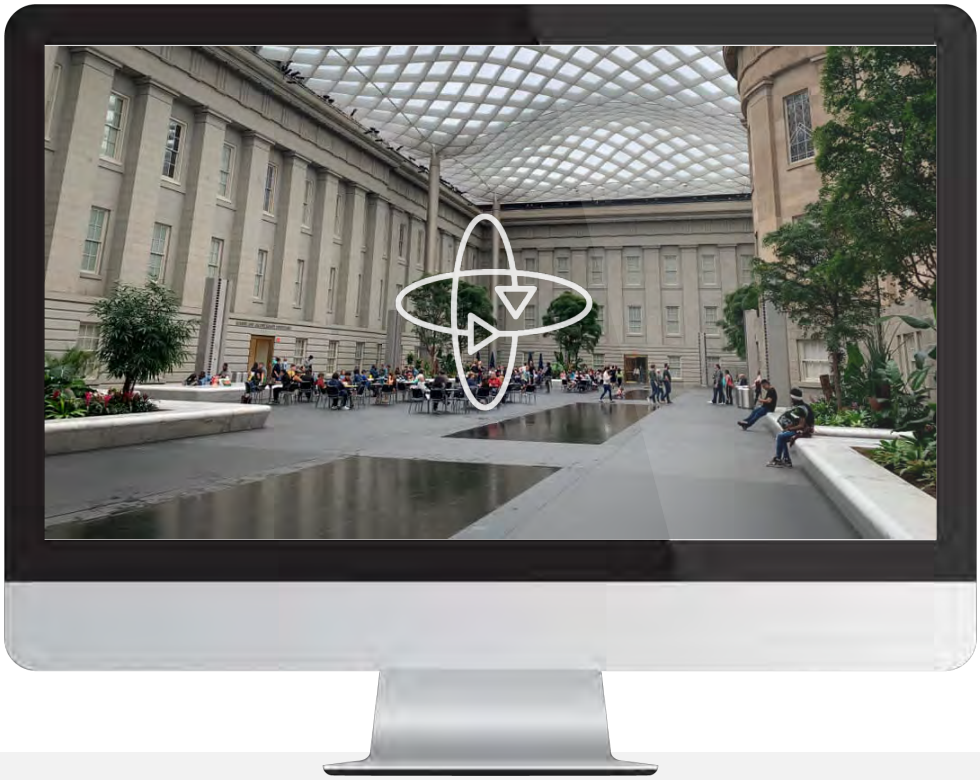
INTRODUCTION

Given social distancing and the fear surrounding Covid19, the face of marketing has changed. And, it may not be just for the short-term. Financial firms need to be prepared to conduct marketing and build business moving forward.

Through multiple research studies and in-depth interviews with some of the most successful financial professionals from across the United States, Red Zone Marketing has uncovered the most profitable, game-changing event ideas for boosting your business in uncertain times.

In this report, you will find 21 event ideas, most conducted via Zoom, along with information on who attended, how they were invited, and resources that may help you conduct similarly successful events right now. All of them have produced new business for the financial advisors who implemented them which is why we are sharing them in this report.

SIDE NOTE: To help support the staff of tourism businesses, events and shows, many companies are offering unique virtual options that have never been offered before. These companies want to support their staff and stay in business so they can once again offer tours and events live. For financial advisors is a great opportunity to support other organizations and provide fun and entertaining virtual events for clients and prospects.



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Types of Virtual Events

SECTION 1	Virtual Games
SECTION 2	Virtual Educational Events
SECTION 3	Virtual Entertainment/Shows
SECTION 4	Virtual Tastings
SECTION 5	Virtual Tours
SECTION 6	Virtual Informal Meet Ups
SECTION 7	Sponsored Events

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VIRTUAL GAMES

WHO WAS INVITED	Clients and their referrals
HOW WERE THEY INVITED	Phone calls initially, emails now
CLIENTS IN ATTENDANCE	Approximately 20 per weekly event
PROSPECTS IN ATTENDANCE	Approximately 15 per weekly event
NEW BUSINESS	YES!
RESOURCES	https://www.bingomaker.com/web-app/free-virtual-bingo-game/

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VIRTUAL GAMES

WHO WAS INVITED	Clients and their referrals
HOW WERE THEY INVITED	Emails and promotion on Facebook
CLIENTS IN ATTENDANCE	30
PROSPECTS IN ATTENDANCE	12
NEW BUSINESS	YES!
RESOURCES	https://www.triviahublive.io/

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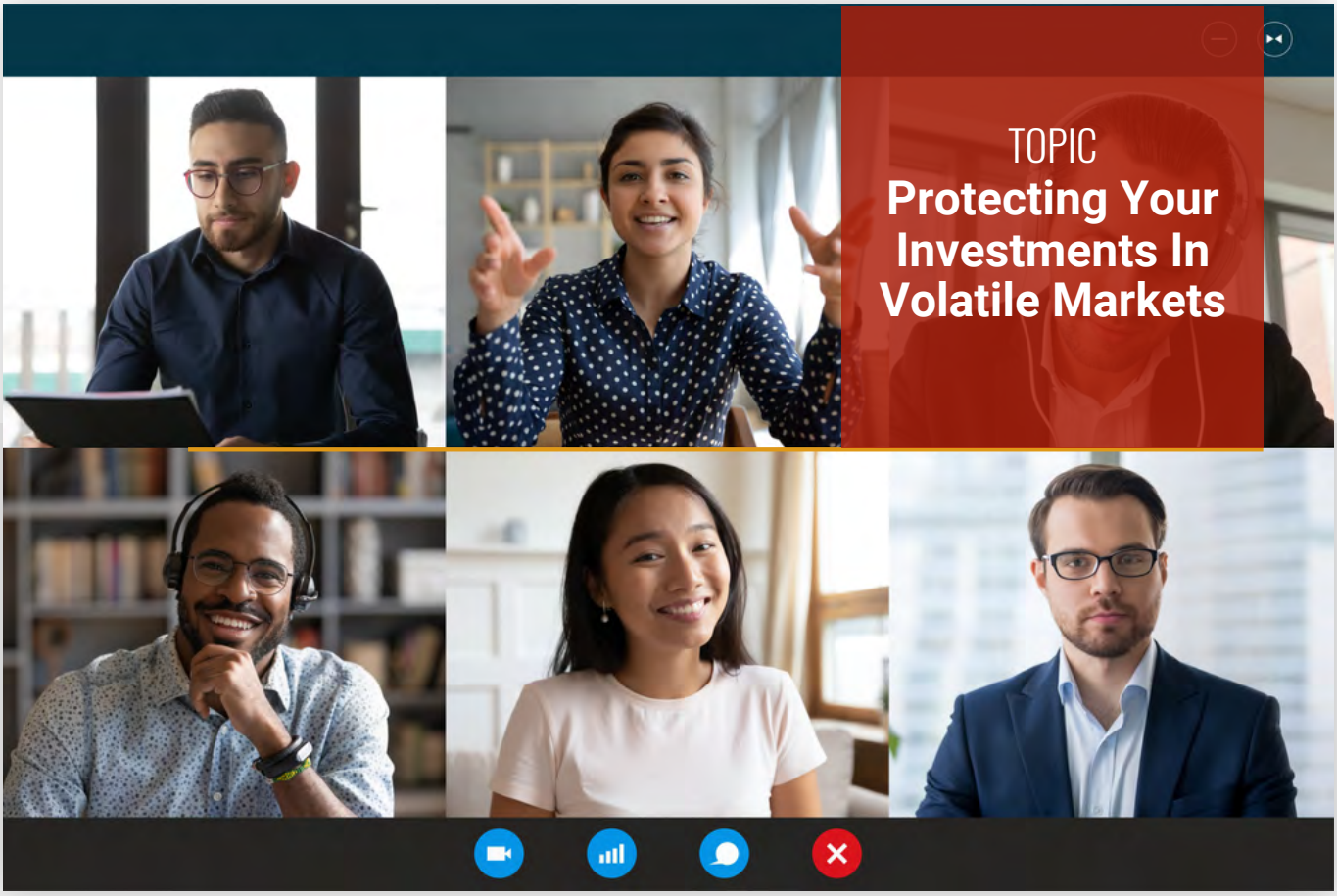
VIRTUAL EDUCATIONAL EVENTS

WHO WAS INVITED	Prospects
HOW WERE THEY INVITED	Emails to current prospect list and social media posts
CLIENTS IN ATTENDANCE	35
PROSPECTS IN ATTENDANCE	35
NEW BUSINESS	YES!
RESOURCES	http://leadingresponse.com or https://whiteglove.com/virtual-seminars/



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VIRTUAL EDUCATIONAL EVENTS

WHO WAS INVITED	Prospects
HOW WERE THEY INVITED	Emails to current prospect list and phone request to clients to pass along information to others
CLIENTS IN ATTENDANCE	27
PROSPECTS IN ATTENDANCE	27
NEW BUSINESS	YES!
RESOURCES	http://leadingresponse.com or https://whiteglove.com/virtual-seminars/

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VIRTUAL EDUCATIONAL EVENTS

WHO WAS INVITED	Prospects
HOW WERE THEY INVITED	Social media
CLIENTS IN ATTENDANCE	31
PROSPECTS IN ATTENDANCE	31
NEW BUSINESS	YES!
RESOURCES	https://whiteglove.com/virtual-seminars/

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VIRTUAL EDUCATIONAL EVENTS

WHO WAS INVITED	Clients & Prospects
HOW WERE THEY INVITED	Email to Clients with a referral request, email to prospects, social media posts
CLIENTS IN ATTENDANCE	43
PROSPECTS IN ATTENDANCE	10
NEW BUSINESS	YES!
RESOURCES	http://leadingresponse.com or https://whiteglove.com/virtual-seminars/

TOPIC

Interview a Money Manager

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VIRTUAL ENTERTAINMENT/SHOWS

WHO WAS INVITED	Clients
HOW WERE THEY INVITED	Email
CLIENTS IN ATTENDANCE	100+
NEW BUSINESS	YES!
RESOURCES	https://www.facebook.com/moplay/

VIRTUAL CONCERT

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VIRTUAL ENTERTAINMENT/SHOWS

WHO WAS INVITED	Clients and their Referrals
HOW WERE THEY INVITED	Email and a Request to Bring Friends
CLIENTS IN ATTENDANCE	50
PROSPECTS IN ATTENDANCE	23
NEW BUSINESS	YES!
RESOURCES	https://www.cszchicago.com/virtual-shows or https://www.secondcityworks.com/services/meetings-events

VIRTUAL CHICAGO IMPROV

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VIRTUAL TASTINGS

WHO WAS INVITED	Clients
HOW WERE THEY INVITED	Email and a Request to Invite Friends
CLIENTS IN ATTENDANCE	15 couples
PROSPECTS IN ATTENDANCE	10 couples
NEW BUSINESS	YES!
RESOURCES	www.bottlesnation.com

HOW TO BOOK YOUR VIRTUAL WINE TASTING EVENT

- Determine how many virtual locations will be participating. Coordinate with your friends and colleagues!
- Use our online booking system to pick a date and time for your group. Book online.
- We will contact you to coordinate wine to be sent to each participant.
- Wine cost per virtual location is $79.99. Each location will receive 4 full-sized bottles of wine.

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VIRTUAL TASTINGS

WHO WAS INVITED	Clients and their Referrals
HOW WERE THEY INVITED	Phone Calls with a Request to Invite Friends
CLIENTS IN ATTENDANCE	4 couples
PROSPECTS IN ATTENDANCE	4 referrals
NEW BUSINESS	YES!
RESOURCES	https://ashevillewellnesstours.com/tour/cooking-class/

VIRTUAL COOKING (and eating) CLASSES

Cooking Classes

Virtual Experience

Gather around the virtual table, sip your favorite beverage, and bond over the preparation of a nourishing meal under the expert direction of a local chef.

LEARN MORE

$75/person

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VIRTUAL TOURS

WHO WAS INVITED	Clients and Prospects
HOW WERE THEY INVITED	Emails and Social Posts
CLIENTS IN ATTENDANCE	47
PROSPECTS IN ATTENDANCE	25
NEW BUSINESS	YES!
RESOURCES	https://www.theguardian.com/travel/2020/apr/06/10-best-virtual-tours-of-worlds-natural-wonders-everest-patagoni

Virtual Climb of Mt. Everest

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VIRTUAL TOURS

WHO WAS INVITED	Clients and their Referrals
HOW WERE THEY INVITED	Emails with a Request to Invite Friends
CLIENTS IN ATTENDANCE	25 couples
PROSPECTS IN ATTENDANCE	15 couples
NEW BUSINESS	YES!
RESOURCES	https://arigatojapan.co.jp/destinations/online-experiences/

Tokyo Online

Tokyo Online: Virtual Experience in Shibuya and Shinjuku with a Local Expert

Online | Cultural Nightlife

Join a local online guide, travel around two exciting spots in Tokyo from the safety and comfort of home. Bring a snack and some drinks to enjoy while we hang out. We will connect across the globe. You will learn a lot about Tokyo and you will know by the end that you have a local friend in Japan!

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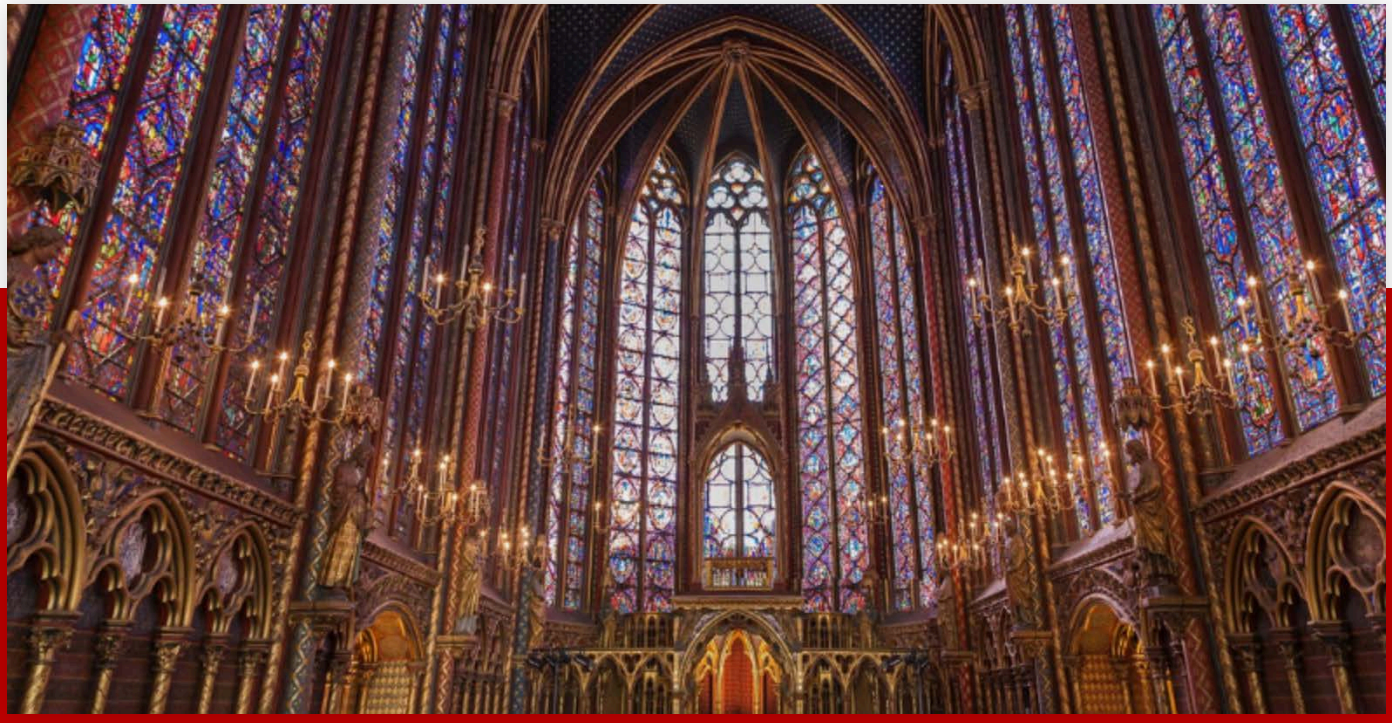
SECTION 5

VIRTUAL TOURS

WHO WAS INVITED	Clients and Prospects
HOW WERE THEY INVITED	Emails and Social Posts
CLIENTS IN ATTENDANCE	Approximately 40 Each Month
PROSPECTS IN ATTENDANCE	Approximately 15 Each Month
NEW BUSINESS	YES!
RESOURCES	https://www.thetourguy.com/tours/virtual-tours



Monthly Group Tours of Cities of The World

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VIRTUAL TOURS

WHO WAS INVITED	Clients
HOW WERE THEY INVITED	Emails and Requests to invite Friends
CLIENTS IN ATTENDANCE	20
PROSPECTS IN ATTENDANCE	15
NEW BUSINESS	YES!
RESOURCES	https://bouchaine.com/visit/virtual-wine-tastings/

Tour of Winery, Vineyard & Tasting

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VIRTUAL TOURS

WHO WAS INVITED	Clients and Prospects
HOW WERE THEY INVITED	Emails to clients with Requests to invite Friends, emails to prospect list, social media posts and paid social advertising
CLIENTS IN ATTENDANCE	30
PROSPECTS IN ATTENDANCE	35
NEW BUSINESS	YES!
RESOURCES	Past event: https://youtu.be/NeTNusuDBg4 Future Events: https://www.facebook.com/getyourguideUS

Guided Tour of the Vatican Museum

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VIRTUAL TOURS

WHO WAS INVITED	Clients
HOW WERE THEY INVITED	Emails and Calls to New Clients
CLIENTS IN ATTENDANCE	2-5 per month
PROSPECTS IN ATTENDANCE	0
NEW BUSINESS	YES!
RESOURCES	https://www.youtube.com/watch?v=GT1HXaWMRDs and https://kuula.co

Virtual Onboarding Office Tour

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VIRTUAL INFORMAL MEET UPS

WHO WAS INVITED	Clients
HOW WERE THEY INVITED	Emails and Calls to Clients and request to invite prospects
CLIENTS IN ATTENDANCE	Approximately 40 per month
PROSPECTS IN ATTENDANCE	Approximately 5 per month
NEW BUSINESS	YES!
RESOURCES	Invite a surprise guest – money manager, famous athlete, spouse ☺

Virtual Happy Hour with Surprise Guest Each Month

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VIRTUAL INFORMAL MEET UPS

WHO WAS INVITED	Clients and Prospects
HOW WERE THEY INVITED	Emails and Calls to Clients and Prospects
CLIENTS IN ATTENDANCE	Approximately 10 per month
PROSPECTS IN ATTENDANCE	Approximately 2 per month
NEW BUSINESS	YES!
RESOURCES	Advisor introduces team members. Each team member talks for 2 minutes about what they do on the team and their background.

Virtual Meet The Team

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VIRTUAL INFORMAL MEET UPS

WHO WAS INVITED	Clients and Prospects
HOW WERE THEY INVITED	Emails to Clients
CLIENTS IN ATTENDANCE	Approximately 20 per month
PROSPECTS IN ATTENDANCE	0
NEW BUSINESS	YES!
RESOURCES	Invite everyone to the Zoom Party who has a Birthday in that month. Send “party favors” in advance. Who doesn’t love to be celebrated?!

Virtual Monthly Birthday Party

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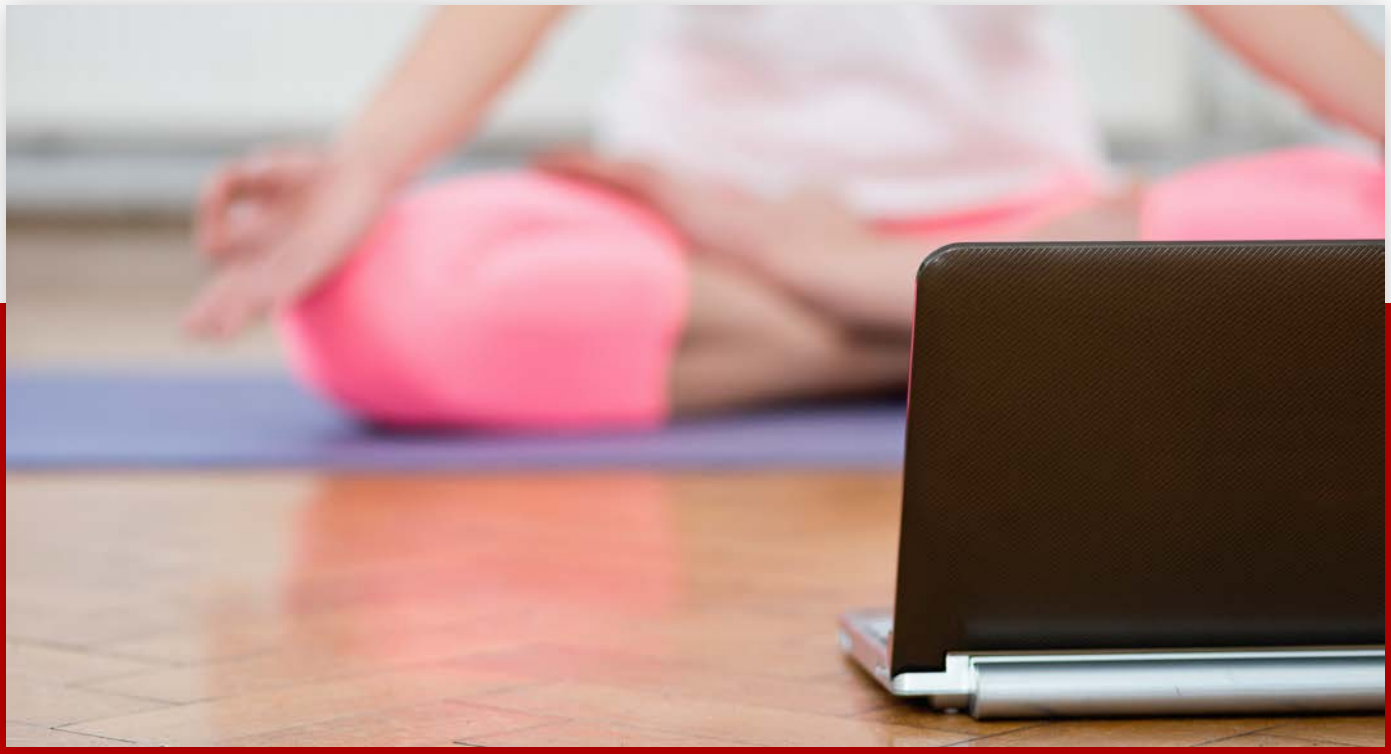
SPONSORED EVENTS

WHO WAS INVITED	Meeting already happening
HOW WERE THEY INVITED	By the yoga business
CLIENTS IN ATTENDANCE	0
PROSPECTS IN ATTENDANCE	Approximately 20 per week
NEW BUSINESS	YES!
RESOURCES	Find a local provider who would like to have a sponsor for their already recurring event. The advisor speaks for 1-2 minutes before the event starts and joins in with the group.



Virtual Yoga - Sponsored

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SPONSORED EVENTS

WHO WAS INVITED	Service already happening
HOW WERE THEY INVITED	By church
CLIENTS IN ATTENDANCE	?
PROSPECTS IN ATTENDANCE	100+ each week
NEW BUSINESS	YES!
RESOURCES	Advisor's church could not get streaming to work so the advisor offered pay for it to be professionally done as a sponsor.

Streaming Church Service - Sponsored

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21

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For More Information Contact
Info@RedZoneMarketing.com
847-367-4066