

***REPLACING***  
***- THE -***  
***RAINMAKER***

***WORKSHOPS***

***B2C MIXERS***

This workbook accompanies the audio workshop. It includes speaker's notes, which summarize the content covered in the workshop. It also includes activities, which you'll complete during the workshop, and a continuing education assignment, which you'll complete after the workshop. The continuing education assignment gives you a chance to apply the theory you learned in a practical setting. At the end, there's a quiz to test what you've learned as well as space to make notes and information on where to go to learn more.

## ***SPEAKER'S NOTES***

### **Learning outcomes**

- You'll learn why it's worth your time and resources to host B2C mixers.
- You'll learn how to host informational events.
- You'll learn how to host hospitality events.

### **Business-to-client mixers**

- Informational events are events that center on a topic of interest.
- Hospitality events are events that feature a firm announcement or celebration.
- Both types of events bring together a variety of constituencies, giving everyone a chance to mix and mingle.

### **Informational events**

- Events should play an important role in your overarching marketing strategy.
- Informational events usually feature a speaker who drives specific content to a targeted audience.
- Informational events might address topics such as retirement planning, financial planning or exit and succession planning.

### **Hospitality events**

- Hospitality events tend to be more celebratory.
- Common reasons for hospitality events include a firm announcement or a recognition event.
- Hospitality events are typically the first events to fall off the radar during a down business cycle.

### **Return on investment**

- B2C events help you win new business, whether through new work or new referrals.
- "Good news opportunities" are a chance to convert positive feelings into business development opportunity.
- Often "good news opportunities" arise when you've saved a client time or money or helped them seize an opportunity.

### **Good news opportunities**

- B2C events also represent "good news opportunities."
- An informational event showcases your intellectual knowledge and provides value to your clients.
- A hospitality event gives your firm a chance to recognize, reward and thank to key contributors.

### **Connect in person**

- B2C mixers give accountants a chance to interact with clients, prospective clients and other professional contacts.
- Accountants lead busy lives, with little time to interact with key constituencies.
- Events are a chance to get people together and good things can happen when you do that.

### **Show your true colors**

- Getting everyone together in person adds depth and substance to your pitch.
- The events you throw say something about you and about what you value.
- Events are particularly important if your competitive advantage and claims highlight your people or culture.

### **Get offline**

- In-person events are a great way to escape the digital trap.
- It's easy now to communicate with your clients entirely digitally.
- Events give you an opportunity to meet in person, which helps deepen your relationship.

## **Play connector**

- There will be benefits for you down the line if attendees at your party make valuable connections.
- Hosting events helps build your public image.
- Events are a great way to increase brand awareness and boost staff morale.

## **Pick topics that have broad appeal**

- Pick topics that have broad appeal for informational events.
- One idea is to create a “planning series” that rotates through different planning topics.
- You want to maximize your value per event, and to do that, you need to attract a sizable audience.

## **Pick an appropriate time**

- Most people want to go home at the end of the workday, yet that’s when most events take place.
- Consider hosting your events at unconventional times and building them into the workday.
- Keep your events short, no more than an hour and a half.

## **Have a hook**

- Hook attendees with a headliner or a great topic.
- Look for speakers whose name your clients will recognize.
- Don’t host the same exact talk every other firm in town is hosting.

## **Repurpose content**

- Repurpose the content after the event is over.
- Post the presentation online to make the content available “on demand.”
- It’s a great way to share your knowledge and demonstrate your value without any extra effort.

## **Make it family friendly**

- Make hospitality events family friendly.
- Add elements that appeal to different members of the family unit.
- Making it a family affair will help keep attendance up.

## **Make it family friendly**

- Inviting the whole family gives you a chance to meet the whole family.
- Your success as an accountant depends on becoming a trusted advisor to your clients.
- Creating an environment where you can meet their extended family can only be a good thing.

## **Build the activity around other opportunities**

- Break the mold and schedule events at unconventional times.
- Consider scheduling your event early in the evening.
- That will allow attendees to go from your event to another event, such as dinner or the theater.

## **Don’t mix too much business with pleasure**

- The point of hospitality events is to thank everyone for their contribution to your success.
- The point of hospitality events is not to put everyone in a room so you can sell stuff to them.
- The valuable business development opportunities at these events come from one-on-one networking.

## **Recognize and reward**

- Make hospitality events about recognition, reward and thanks.
- If you’re going to say a few words at the event, make the focus about the audience.
- Saying thank you, and demonstrating you mean it, is a crucial part of all business endeavors.

## **Find the host with the most**

- You don't have to host all your events in your firm's conference room.
- Consider off-site locations for your events.
- Think about whether you have any hospitality-oriented clients who would be good hosts.

## **Create an eye-catching invitation**

- Create eye-catching invitations for informational and hospitality events.
- The quality of the invitation says a lot about the quality of the event.
- It's worth it to spend a few dollars to create an invitation that grabs the reader's attention.

## **Remind, remind, remind!**

- Remind attendees frequently.
- Follow up with a phone call after you've sent the initial invitation.
- It's important to mix up your methods with your reminders.

## **Remind, remind, remind!**

- Don't be an annoyance but be persistent.
- Promote events on social media to help build anticipation.
- Always publish dates far in advance.

## **State the benefits outright**

- Tell attendees why they should come.
- Make sure the value proposition of your event is clear.
- Top 5 lists are often an effective strategy for getting the benefits across.

## **Play host**

- Provide your staff with a list of attendee bios before the event.
- Place hosts at all entry points to ensure guests are welcomed when they arrive.
- This makes it easy for guests to join the party seamlessly.

## **Work the room**

- Practice your elevator pitch before the event.
- Research who will be there ahead of time.
- Set a goal for yourself and don't leave until you've met your goal.

## **Work the room**

- Smile, relax and look like you're having fun.
- Ask insightful questions, listen actively to the answers and try to make a personal connection.
- The key to success at networking events is to talk to a lot of people.

## **Focus on building relationships**

- Don't sell too hard at networking events.
- It's impractical and not the point of the event.
- The point is to connect with attendees and begin to build a relationship.

## **Follow up afterward**

- Always follow up after the event.
- Call attendees to thank them for coming and to restart the conversation.
- Send each attendee something tangible after the event.

## Odds and ends

- Make registration seamless.
- One great event will lead to many more.
- People will talk and everyone will be eagerly awaiting the next event.

## Summary

- B2B mixers are a great way to win more work and to connect with clients and prospective clients in person.
- Informational events give you a chance to showcase your firm's expertise.
- Hospitality events give you a chance to celebrate successes.

## ACTIVITIES

If you're completing these activities on your own, please write down your answers in your workbook. If you're completing these activities in a group, please write down your answers individually. Then share your responses with up to two other people. Look for commonalities among everyone's responses and discuss any differences.

### Activity 1

Suggest five topic ideas for an informational event. For each idea, explain the appeal of that topic to your clientele.

### Activity 2

If the focus of a B2C event is getting to know the people in the room, craft a list of 10 questions you might ask to achieve that goal. For example, for people you haven't met before, you might ask: "Where did you grow up?" "What did you study in college?" "What do you like to do in your spare time?" For people you know but haven't seen for a while, you might ask: "What's changed since the last time I saw you?"

## CONTINUING EDUCATION

Attend a B2C informational or hospitality event and practice your one-on-one networking skills.

## QUIZ

1. The two most common types of B2C events are informational events and hospitality events.
2. Informational events usually feature a speaker who drives specific content to a targeted audience.
3. Hospitality events give your firm a chance to recognize, reward and say thanks to the key contributors who've helped them along the way.
4. A good news opportunity isn't necessarily an opening to ask clients for more work or referrals.
5. B2C mixers provide an opportunity to connect people from across your network, including employees, clients, prospective clients, vendors, strategic alliance partners and referral sources.
6. Good B2C events are both fun and lead to tangible business development gains.
7. B2C events do little to increase brand awareness or boost staff morale.
8. The best B2C events take place at the end of the workday.
9. It's not necessary or important for you to repurpose the content you create for a B2C informational event.
10. If you want people to come, tell them what they'll get out of it. Make sure the value proposition of your event is clear.

## ***NOTES***

## ***FOR MORE INFORMATION***

For more information about additional workshops, or other Replacing the Rainmaker products and services, please visit [ReplacingTheRainmaker.com](http://ReplacingTheRainmaker.com).