



SEMINAR FOLLOW-UP CALL SCRIPT

Goal: Reconnect with attendees, refresh their memory, rebuild warmth, and schedule their appointment – without sounding pushy or awkward.

1. MINDSET BEFORE YOU CALL

- You're not "selling" – you're serving. They came because they wanted clarity.
- You're the familiar, helpful voice that bridges curiosity to confidence.
- Keep it light, human, and conversational – smile before dialing.

2. OPENING THE CALL

"Hi [First Name], this is [Your Name] with [Firm Name].

I just wanted to thank you again for joining us last night at [Venue Name]. Did you and [Spouse Name] enjoy the dinner?"

(Pause, respond naturally – humor and warmth go a long way.)

"We really enjoyed having you there – [Presenter Name] had a great time meeting everyone.

I wanted to follow up because a lot of people left saying it really got them thinking about their retirement plan, especially around [specific topic discussed – e.g., taxes, income planning, market risk]."

3. RE-ANCHOR THEIR MEMORY

People often forget who you are or what the event was about – remind them gently.

"Just to jog your memory – it was the retirement workshop at [Venue Name], where [Presenter] talked about ways to create steady income in retirement and keep more of it from taxes."

"We met right before/after the presentation – I was helping at the registration table / handing out packets."

4. TRANSITION TO VALUE

Connect their attendance to a next step.

"We know everyone's situation is a little different, and a lot of folks asked how to see what those ideas might look like with their own numbers.

That's why we set aside a few complimentary planning sessions this week and next – just a chance to personalize what we covered."



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(Pause, check tone – stay friendly and calm.)

“It’s not a sales pitch – it’s simply a 45-minute visit where [Advisor Name] walks you through how to make your money last, what you’re paying in fees, and how to keep more of it from Uncle Sam.”

5. CREATE EASY ACTION

“Would you like me to go ahead and reserve a time for you while I’ve got the calendar open? We’ve got a few times this [Day/Time Window] and some next [Weekday]. Which would be easier for you?”

(If they hesitate, use the gentle nudge below.)

“Totally fine – even if you’re just curious, it’s a great way to see where you stand. Most people tell us it’s the most helpful hour they’ve ever spent on their retirement.”

6. HANDLE COMMON OBJECTIONS (Soft, No Pressure)

“We already have an advisor.”

“That’s great – most of the people we meet do. They just want a second opinion to make sure everything’s still working as well as it could be.”

“We’re busy right now.”

“Totally understand. That’s why we hold a few flexible spots – would a quick 30-minute review next week work better, or should I note to circle back after [timeframe they give]?”

“We’re not sure we’re ready.”

“No problem at all. There’s no commitment – just clarity. Most people tell us they walk out feeling relieved, whether they make changes or not.”

7. LOCK IN THE DETAILS

“Perfect – I’ve got you down for [Day/Time]. You’ll meet with [Advisor Name] here at our [Office Location]. We’ll send you a quick confirmation email and text with directions.”

(Optional add-on for stronger stick rate)

“You’ll also get a short video from [Advisor Name] just thanking you for attending and confirming what to bring – keep an eye out for that later today.”



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8. CLOSE WITH WARMTH

“We really appreciate you coming out last night, [First Name]. It means a lot that you took the time to think about your future – we look forward to seeing you on [Day]. Have a great rest of your week!”

PRO TIPS (Pulling from the Manual)

- **Speed equals trust.** Call within 24 hours of the event.
- **Track everything** – log calls, texts, and responses in your Seminar Tracker.
- **Personalize** each call: mention the restaurant, table conversation, or a story the presenter told.
- **Keep the tone “neighborly professional.”** Confident, never scripted.
- **Follow every call with a confirmation email and/or text reminder** the next morning.

OPTIONAL VARIATION – TEXT OR EMAIL FOLLOW-UP

“Hi [First Name] – this is [Your Name] from [Firm Name]. Thanks again for joining us at [Venue]! We really enjoyed having you. [Advisor Name] has a few complimentary retirement sessions open this week to help personalize what we covered. Would you like me to reserve one for you? Quick and easy – no sales pitch, just clarity.”

SEMINAR FOLLOW-UP VOICEMAIL SCRIPT

Goal: Re-engage attendees, remind them who you are, and prompt a callback or reply – without sounding salesy or robotic.

CONTEXT & TONE

Speak **slowly, clearly, and with warmth.**

Smile while you talk – it genuinely changes how you sound.

Keep it under **35 seconds.**

End with a clear reason to call back and an easy way to do so.

CORE SCRIPT

“Hi [First Name], this is [Your Name] calling from [Firm Name].

I just wanted to thank you again for joining us at [Venue Name] the other night – it was great having you with us.



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I know [Advisor Name] shared a lot about retirement income and protecting what you've built, and we wanted to offer you one of the complimentary one-on-one visits we set aside for attendees.

It's a simple, no-pressure conversation to see how everything fits with your own plan.

You can reach us back at [Phone Number], or if it's easier, just reply to the text or email we sent earlier today to grab a time that works for you.

Again, this is [Your Name] at [Firm Name] – we look forward to connecting soon!"

SHORTER VERSION (When calling a large list)

"Hi [First Name], this is [Your Name] with [Firm Name].

Thanks again for coming out to [Venue] this week – we really enjoyed meeting you.

We've got a few complimentary retirement review spots open for attendees over the next week or so – just call us back at [Phone Number] or reply to our email to lock in a time.

Again, this is [Your Name] with [Firm Name] – talk soon!"

NO-SHOW VARIANT

"Hi [First Name], this is [Your Name] with [Firm Name].

I saw you had registered for our retirement workshop at [Venue] but weren't able to make it – totally understand, life happens.

I just wanted to reach out personally and offer you the same complimentary one-on-one retirement visit we shared about that night.

It's a great way to catch the highlights and see how the strategies might fit your situation.

You can call us at [Phone Number] or reply to this message to find a time that works best.

Again, this is [Your Name] with [Firm Name] – we'd love to help however we can."

PRO TIPS FROM THE MANUAL

- **Call within 24–48 hours** after the seminar. Speed equals trust.
- **Pair the voicemail with a text or email** immediately after – same message, short and friendly.
- **Use your name twice** (once early, once at the end) to build familiarity.
- **Always mention the venue or topic** to trigger memory: most people attend multiple events and forget which one you were.
- **End on an open door, not a hard CTA** – the tone should feel like an invitation, not a pitch.