

EMERALD MAIL DIRECT

Emerald has a long history of helping our clients market their financial seminars to a wide range of prospects, across diverse geographical locations. The tips below are derived from the many mailings performed, along with the experience gained from our *Science of Seminar Selling* training program. These tips are crucial aids to the successful outcome of your seminar. The guidelines provide information for a variety of marketing efforts, including Dining Seminars, Co-Sponsor Presentations, and Client-Only meetings. If you have additional questions, please call StoneRiver-Emerald and we will be glad to assist you in your planning efforts.

The Seminar Presentation

- ◆ Choosing the right seminar to present is critical. It conveys volumes about you and the professional standards you maintain. The energy and resources that you will spend in getting attendees to your seminar warrant a top-notch presentation.
- ◆ For help in choosing the right seminar, call StoneRiver-Emerald.

The Meal

- ◆ Provide one!
- ◆ Dinners will generate the strongest response – by far.
- ◆ Lunch is an alternative, but should not be a stand-alone option.
- ◆ Breakfast is an inferior choice.
- ◆ Sodas and cookies, appetizers, wine and cheese, desserts, etc. will deliver a lower response.
- ◆ DO NOT charge your prospects for attending the seminar.

The Location

- ◆ Restaurant are the preferred option.
- ◆ C.C. or hotels can be used, but will generally obtain fewer responses.
- ◆ DO NOT hold dinners at Convention Centers, Libraries, or your office.

The Time

- ◆ Early evening is best.
- ◆ Don't start before 6:30 pm. People need time to arrive after work.
- ◆ Don't start after 7:30 pm. People won't stay out too late.
- ◆ Don't expect working people to leave work to attend.
- ◆ Retirees don't have work conflicts, so the presentation can be scheduled earlier.

The Date

- ◆ The best days to hold seminars are Tuesdays, Wednesdays, and Thursdays. (See StoneRiver-Emerald's Seminar Marketing Calendar for specific dates.)
- ◆ Weekends, holidays, dates of major sporting events, and election days should be avoided.

The Mail Piece

- ◆ Whenever possible, leverage StoneRiver-Emerald existing language in the direct-mail letter. It captures years of direct-mail industry experience.
- ◆ If possible, obtain a logo that refers to the seminar location to add familiarity to the offering.
- ◆ Put the restaurant logo on the envelope, if possible. Color envelopes will get the best response. 5,000-piece mailings are the preferred minimum for mailings representing multiple events.
- ◆ We can accept any content that you have created or have secured permission to utilize, however, additional time will be required. By providing your own content or the content from a third-party, you represent that you have the authority to use and/or modify that information and are giving StoneRiver-Emerald permission to use that information in the printing of your mailing piece.

Initials _____

The List

- ◆ List information is gathered from a variety of different sources. Lists are not guaranteed to be 100% accurate. The demographic information and the address information are subject to the list collection methodology of the list provider and verification procedures.
- ◆ StoneRiver-Emerald only uses reputable list sources with established track records; however, the lists will contain inaccuracies. The only accurate way to validate income level is to review solid documentation. Verification of confidential information will need to take place during appointments with clients.
- ◆ Standard deliverability rates are typically in the 95-98% range (national standard).
- ◆ Individuals within a particular Zip code may or may not be included in a list that you select. Although some homes or individuals may match your selected criteria, they may not receive the mailing if the list company is unable to verify their actual demographics. This is a standard challenge facing list-accumulation companies.
- ◆ Due to the DO NOT CALL regulations, StoneRiver-Emerald does not offer phone numbers with acquired lists. If you desire phone numbers, please discuss options with your EMD Marketing Consultant.

Mail Delivery

- ◆ Pieces are mailed Standard Presort as the baseline service.
- ◆ If you want the mailing to be delivered more quickly, we offer Priority service. This will direct your mail to the destination USPS Sectional Center Facility, bypassing a variety of normal USPS stops. To further expedite the mailing, First Class Presort may be chosen. Additional fees apply for mailing options other than Standard Presort. The following time frames are typical but not guaranteed by the USPS:
 - Standard Presort – 8-16 days
 - Standard Presort Priority – 5-13 days
 - First Class Presort – 2-7 days
 - Additional time will be required for jobs located in Alaska and Hawaii
- ◆ Pieces should be scheduled to be delivered to the destination address no later than 10 calendar days before the seminar date.
- ◆ StoneRiver-Emerald cannot dictate delivery time to the USPS and is not responsible for early or late deliveries relative to the seminar date. Often, the mailing will be delivered over several days to the destination addresses.
- ◆ Responses to any offer or call for reservation will vary, and StoneRiver-Emerald cannot predict when or how quickly your prospects will respond.
- ◆ StoneRiver-Emerald is not responsible for results. Please request feedback to help ensure your success.
- ◆ StoneRiver-Emerald is NOT responsible for advisors' mailings that cross over or overlap in an area.

Reservations

- ◆ Reservation call-in's should be handled by a live contact.
- ◆ Confirmation should be done through a phone call, not a letter or other correspondence.
- ◆ Answering machines leave the potential attendee uncertain and will diminish response. 24-hour access is best.
- ◆ Professional call centers are an excellent alternative for taking reservations, if they handle it correctly.
- ◆ We suggest using a live, staffed 24-hour answering service to accept your reservations. Should you need help in locating a service, we can refer you to one used by many of our clients.

Confirmations

- ◆ Confirm attendance 2-3 days prior to the seminar.
- ◆ Confirmation should be done through a phone call.

After the Seminar:

- ◆ Follow up the next day to schedule and confirm complimentary consultations.
- ◆ If you wait any longer, there is a very good chance of losing your prospects.
- ◆ It is best to schedule the appointments yourself, instead of using an assistant. It will be much harder for your prospect to turn you down than your assistant. If you've established rapport, the sense of obligation will be strong.

Please sign below. Your signature indicates that you understand the tools needed for a successful seminar. If you do not follow the above guidelines, your results may be impacted negatively. After signing, fax to StoneRiver-Emerald at (858) 674-2465.

X

Date

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