



WORKSHOP-IN-A-BOX

EVERYTHING YOU NEED FOR A SUCCESSFUL VIRTUAL WORKSHOP ALL IN ONE PLACE.

DMI will provide you with everything you need to execute a successful **live** webinar, packaged up and ready for you to use. From pre-event, to post-event, and everything in between, your DMI team has you covered. For optimal results, DMI recommends live webinars.



WHAT YOU WILL RECEIVE

- ✓ **DEDICATED WORKSHOP COORDINATOR**
DMI has a dedicated, full-time seminar and workshop coordinator to help you through every step of the process.
- ✓ **FILL THE SEATS**
Use one of DMI's trusted partners to fill the seats at your event. Our workshop coordinator will walk you through each option and help you choose the best vendor for your specific goals.
- ✓ **WORKSHOP PLANNING & OPTIMIZATION CALENDAR**
You will receive a workshop planning and optimization calendar to help guide you through choosing the best event date, as well as calculate how many workshops you should do in a year to meet your revenue goals.
- ✓ **PRESENTATIONS**
Professionally designed, compliance approved presentations on a variety of topics, including Maximizing Social Security and Taxes in Retirement.
- ✓ **TRAINING**
Training on the presentation and materials provided by our VP of Sales and your individual Sales Consultant, so you are well versed on the content prior to your event.
- ✓ **CUSTOMIZED MATERIALS**
Materials to use during your presentation, including poll questions to keep the audience engaged and educational brochures to offer as an appointment booking incentive.
- ✓ **EMAIL AND PHONE SCRIPTS**
Scripts for post-event follow up to ensure you are optimizing your conversations for maximum appointment booking ratios.
- ✓ **ENROLLMENT IN OUR EMAIL MARKETING CAMPAIGN**
Stay top of mind with prospects and continuously drip on them with educational content.
- ✓ **FIRST APPOINTMENT MATERIALS**
Everything you need to execute a successful meeting, from a first appointment outline, to a client-facing lifestyle budget planner and retirement readiness scorecard.