



21

Game-Changing Virtual Event Strategies to Spark New Business

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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.

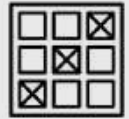
SIDE NOTE: To help support the staff of tourism businesses, events and shows, many companies are offering unique virtual options that have never been offered before. These companies want to support their staff and stay in business so they can once again offer tours and events live. For financial advisors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



Types of Virtual Events

SECTION 1

Virtual Games



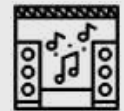
SECTION 2

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



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/>



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/>

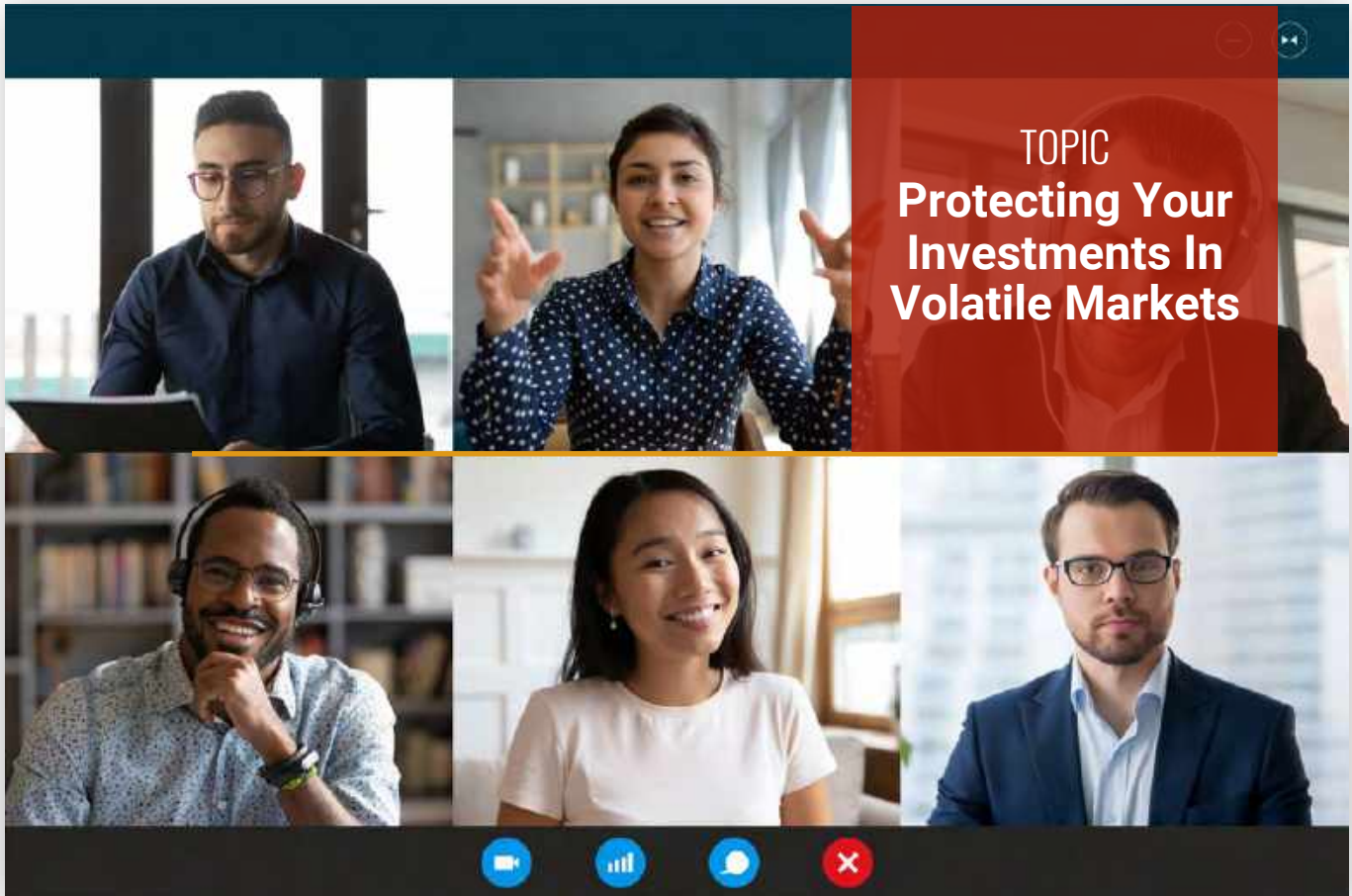


**HOSTED VIRTUAL
TRIVIA EVENTS**

BOOK NOW

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/



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/



VIRTUAL EDUCATIONAL EVENTS

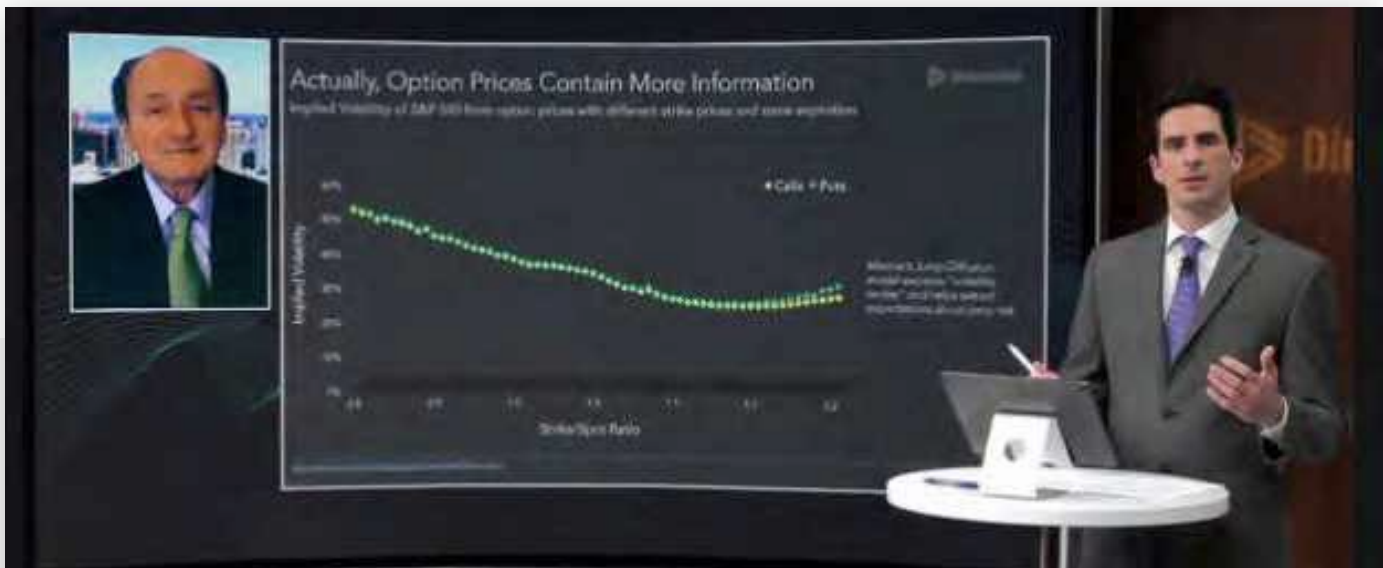
WHO WAS INVITED	Prospects
HOW WERE THEY INVITED	Social media
CLIENTS IN ATTENDANCE	31
PROSPECTS IN ATTENDANCE	31
NEW BUSINESS	YES!
RESOURCES	https://whiteglove.com/virtual-seminars/



TOPIC
**Taxes in
Retirement**

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

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

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 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.



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

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

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!

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

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/

HOW IT WORKS

1. SELECT YOUR EXPERIENCE

Select from four different experiences, with each experience including its own set of wines to be shipped to your door.

2. SCHEDULE A TIME

After your purchase, please reach out to us via phone or email to schedule the best available time that works for you.

3. VIEW THE LIVE TASTING

A private host seated before the panoramic view of the Bouchaine Vineyards will then lead you and guests through a discussion of the wines.



Tour of Winery, Vineyard & Tasting

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

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

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

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

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

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

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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to Spark New Business**

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