



Instructor Tools:

Post-Class Follow Up Guide

We know how important that initial post-class follow up is but also how tricky it can feel to get right. That's why we've put together this quick to provide tips on how to effectively do so in order to successfully convert them into clients.

Why Follow Up is Crucial

Hosting a financial education course is an excellent way to establish yourself as an authority in your local community and attract potential clients. Following up allows you to continue building a relationship with these individuals and demonstrate your expertise even further. Offering a complimentary 1-1 consultation post-class is an incredibly valuable way of converting attendees into clients.

Tips for Effective Follow Up

Here are some tips to keep in mind when following up with course attendees:

Personalize your Follow Up Emails

Instead of sending out generic emails, take the time to personalize each one. Mention something specific from the course that resonated with the attendees or ask a question related to their personal financial goals. This will show that you value their attendance and are genuinely interested in helping them.

Provide Valuable Resources

In addition to personalized emails, consider offering additional resources such as blog posts or helpful handouts. These can further showcase your

expertise and provide attendees with valuable information they can use to improve their financial situation.

Be Persistent but not Pushy

It's important to follow up multiple times, as some attendees may need a little more time and encouragement before making the decision to become a client. However, be mindful not to come across as pushy or aggressive in your approach. Remember, building relationships takes time and patience. Educational marketing is a long-term strategy with high payoff.

More Follow Up Tools

We've created a series of post-class nurture emails for you to use and customize! You can find our "Post Class Attendance Nurture Email Series" in our Instructor Tools section of our Instructor Knowledge Base.