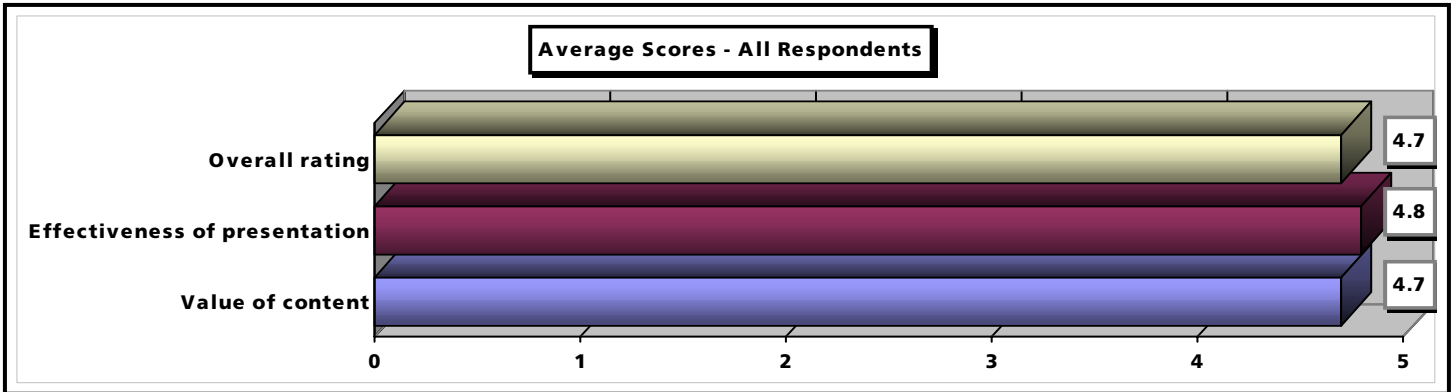




Presentation Evaluation Summary

Event: IMCA Fall Money Management Exposition
Program: Making the Web Work for Consultants
Location: St. Louis, MO **Sponsor:**
Attendees: 225

Date: September 20, 2005
Evaluations Returned: 118
Response Rate: 53%



Distribution of Individual Scores						
	<u>Poor</u>	<u>Fair</u>	<u>Good</u>	<u>Very Good</u>	<u>Excellent</u>	<u>Total</u>
Overall	0	0	0	30	73	103
<i>Share</i>	0.00	0.00	0.00	0.29	0.71	
Presentation	0	0	0	22	81	103
<i>Share</i>	0.00	0.00	0.00	0.21	0.79	
Value	0	0	2	23	78	103
<i>Share</i>	0.00	0.00	0.02	0.22	0.76	

Overall, I would **DESCRIBE** this session as...

- “Search engines and Web sites.”
- “Very eye-opening.”
- “Excellent.”
- “Informative.”
- “Very eye opening and useful.”
- “Great ideas to use immediately.”
- “Helping me get off my cyber-ass and move to the next level. I have a Web site, use email extensively but need to utilize technology to service and retain clients.”
- “Really creative and invaluable tips.”
- “Valuable.”
- “Very good.”
- “Extremely interesting.”
- “Excellent.”

- “Extremely helpful.”
- “Excellent. Every advisor looking to increase office efficiencies and production should attend.”
- “One of the five nuggets I look for at a meeting.”
- “Very interesting.”
- “Very good.”
- “Useful.”
- “Very good.”
- “Excellent.”
- “Excellent and actionable.”
- “Helpful. Thank you.”
- “Great.”
- “Very helpful – really good – great job!”
- “Very useful, practical.”
- “Super.”
- “Great ideas.”
- “Innovative.”
- “Hands on!!”
- “Excellent.”
- “Very helpful!”
- “Very helpful; simple but effective.”
- “Very applicable to our businesses.”
- “One of the most useful I've experienced.”
- “Great blocking and tackling.”
- “Excellent.”
- “Immediately useful.”
- “Stuff I can use everyday, a nice break from just the academia.”
- “Outstanding.”
- “Very beneficial.”
- “Excellent.”
- “Very useful.”
- “Very valuable – quick, easy to apply immediately techniques to share with our reps at 700 financial institutions in 42 states.”
- “Very informative and valuable; great presentation!”
- “Challenging to me to get started.”
- “Informative.”
- “Helpful.”
- “Very informative.”
- “Outstanding!”
- “Good information.”
- “Empowering.”
- “Opening a world I'm reluctant to get into.”
- “Good.”
- “Very helpful.”
- “Useful because it's applicable.”

- “Good.”
- “Helpful.”
- “Excellent.”
- “Very good.”
- “Insightful.”
- “Helpful - provided clarity to our use of the Web... Cooleremail.”
- “Valuable.”
- “Applicable and interesting.”
- “Good but heavy content into small time.”
- “Very useful.”
- “Extremely leveraging.”
- “Valuable... time well spent.”
- “Very helpful.”
- “Very informative.”
- “Helpful.”
- “VERY informative.”
- “Informative...”
- “Very useful.”
- “Very informative.”
- “Helpful in locating prospective new clients.”
- “Very helpful.”
- “Informative - pragmatic.”
- “Refreshing.”

The **BEST IDEA** I heard was...

- “Access to info.”
- “How much info is out there.”
- “Ways to use Google.”
- “Communicate with clients every 2 weeks.”
- “Furl.net.”
- “The site tips as resources.”
- “Site preferences.”
- “Furl/Google alerts”
- “How to search and giving specific examples of sites.”
- “How to search.”
- “COI info - how to get to “know them” better.”
- “Google alert, Address Grabber.”
- “Accessing the ASAE site - knowing current events.”
- “Better using Google.”
- “All were equally good.”
- “Egrabber/quotes/*Google info*.”
- “EGrabber and ASAE.”
- “All great ideas.”
- “Several.”

- “Do it.”
- “Email sites, About, Furl.”
- “Explosive use of Google, CoolerEmail.com”
- “Furl.net and Google Alerts”
- “How to surf Internet and egrabber.com.”
- “Google news alert.”
- “CoolerEmail.com”
- “Google info.”
- “Obtaining association info to target directly; follow up and know more re: client interests.”
- “All of the information was relevant; enjoyed the Web site into the most. “
- “The various uses of Google.”
- “The association web site.”
- “Prospecting ideas and ideas to find info on what clients/prospects want to learn about.”
- “About.com”
- “Address Grabber.”
- “Egrabber.”
- “Search features and hints.”
- “Several Google ideas.”
- “Various sites that I can use as tools.”
- “Steps to take.”
- “Furl, egrabber.”
- “Furl.com”
- “Web sites.”
- “Surveymonkey.com”
- “Insight to engage others on my team.”
- “The various links to info and search language.”
- “Google ideas.”
- “About.com”
- “Egrabber.”
- “Google use.”
- “Google advanced search.”
- “ASAE.”
- “ASAENet.org and About.com.”
- “Satisfied HNW clients prefer contact every 2 - 3 weeks.”
- “Link sites.”
- “How to utilize Google.”
- “Learning about keywords.”
- “Google tips.”
- “How to efficiently prospect new business.”
- “How to use Google more efficiently.”
- “All the free Google services.”
- “All good ideas - opened my eyes.”
- “Different prospecting sites.”
- “Google search.”
- “Google information.”

- “Association executives listing.”
- “egrabber.com”
- “Web sites and using quote marks.”
- “Email client service review.”

I wish you had spent **MORE TIME** on...

- “More valuable sites.”
- “An example i.e. foundations and how to find them in our area.”
- “Everything! This would be a terrific workshop - giving each person the opportunity to set a personal game plan.”
- “Referrals.”
- “Google.”
- “All good.”
- “Same ideas just more of it.”
- “Great as is.”
- “Prospecting ideas/retention ideas.”
- “N/A.”
- “Would like to have time to play around on the sites.”
- “N/A - all was good.”
- “Cooleremail.com”
- “I could have drilled into more examples on same topic.”
- “Narrowing down searches.”
- “Slowing down the information flow.”
- “Organizing data/CRM”
- “Office computerization.”
- “Web site hosting, tips.”
- “Client referral/COI ideas/marketing myself.”
- “Most of material.”
- “Q&A.”
- “Facilitating client communication by email.”
- “Other databases in addition to asaenet.org”
- “N/A.”

To **IMPROVE** this presentation, you should...

- “Have more time.”
- “Be longer.”
- “Excellent presentation.”
- “Bring you home with me.”
- “Great - can't imagine how to improve.”
- “N/A. Great presentation!! Thank you!”
- “N/A - good amount of info.”
- “N/A - great.”
- “Talk about the knowledge journal.”
- “Ask what people want”

- “N/A”
- “Have more time.”
- “Limit to 1 hour.”
- “Not much - very well done.”
- “More ideas with examples from current clients; making systematic.”
- “Slow down and give out handouts prior for notetaking.”
- “Direct client servicing/communication.”
- “Give handout on the way in.”