



CAPSTONE MARKETING

IMPORTANT ONLINE WORKSHOP INSTRUCTIONS

Dear Colleague,

Thank you very much for registering to attend our online workshop **"How to Upgrade Your Client Base to Optimize Profits"** presented by Capstone Marketing. The webinar is scheduled for:

Wednesday, October 20, 2021

1:00-2:15 p.m. Eastern

(That's 12:00 p.m. Central, 11:00 a.m. Rocky Mountain, 10:00 a.m. Pacific)

Please click the link below to join the workshop:

<https://zoom.us/j/96528604389?pwd=bStlWVU2aolNdDRNbHFGSotlT01QZz09>

Passcode: **025951**

This workshop will start promptly at 1:00 p.m. Eastern. Please connect 10-15 minutes in advance for a tech check. We will not be able to handle service or support requests during the session.

Here are some useful tips to get the most out of the workshop:

- Reserve a conference room and set up a data display and computer so all of your team members can watch the presentation – using safety protocols, of course.
- Prepare in advance by noting at least one client you would like to retain and one you would like to transition out (terminate).
- During the workshop you can submit questions using the Q&A function. You are asked to keep your microphone muted except when asking a question.
- The list of those who login is part of the verification process for CPE so please use your first and last name.
- Submit your questions in advance by emailing jcaragher@capstonemarketing.com.

CPE Credit

Following the workshop, you will be invited to complete a brief feedback survey. I would appreciate it if you would take a few minutes to let us know your thoughts about the session. **This is also part of the verification process for the CPE** so it's important that you complete the survey. Note: 1.5 CPE credits will be given to those attending the live workshop.

Watch your email for additional reminders from Capstone Marketing. Meanwhile, I look forward to a fun, focused workshop with you.

Sincerely,

Jean Caragher
Capstone Marketing

P.S.: If you have any additional questions or requests before the webinar, please don't hesitate to contact me (at jcaragher@capstonemarketing.com, or 1-727-324-3379) no later than 30 minutes prior to the program.

P.S.S. This workshop will be recorded.