

Client Advisory Council Checklist

4-6 Weeks Prior to Event

- » Book location
- » Verbally invite clients
- » Send written invitations
- » Book professional facilitator, if needed
- » Make food and beverage arrangements
- » Create agenda

2 Weeks Prior to Event

- » Prepare ground rules document
- » Prepare list of sample questions for facilitator
- » Determine note-taker
- » Email participants to confirm attendance; attach agenda
- » Order materials needed (paper, pens, mugs, etc.)

2 Days Prior to Event

- » Print agendas & ground rules
- » Print nametags or tents
- » Prepare other relevant materials
- » Confirm food and beverage with vendor
- » Call to confirm attendance with advisory council members; follow up with reminder email and agenda

Day of Event

- » Distribute materials at each participant chair: agenda, notepad, pen
- » Confirm food and beverage timing with vendor

Post-Event

- » Debrief with team
- » Create action plan
- » Send thank you notes to clients
- » Enter reminder in CRM to follow up with updates in 3 months