CARSON COACHING

Client Appreciation Event Checklist

Event:

Date & Time:

Location:

Contact:

Phone Number:

Email Address:

Professional:

Contact:

Phone Number:

Email Address:

Special Notes:

At least 6-8 Weeks Prior to Event

- [ ] Determine event topic/activity
- [ ] Set date & time of event
- [ ] Book venue
- [ ] Place event on calendars of advisor and others in the office who should attend
- [ ] Book professional/expert, if needed
- [ ] Make food and beverage arrangements
    - » Ensure you have food options that will accommodate all clients (including gluten free, vegetarian and vegan options and non-alcoholic beverages)

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- [ ] Determine clients, prospects, and COIs to invite
- [ ] Design invitations and submit to compliance for approval (if necessary)
- [ ] Order hard-copy invitations (if necessary)
- [ ] Set up event in CRM or online event tracking system
- [ ] Consider asking a sponsor to help with costs of the event

4-6 Weeks Prior to Event

- [ ] If a small event, Advisor verbally invite attendees followed by emailed save the date
- [ ] If a large/all client event, send out hard-copy or emailed invites
- [ ] If an all client event, add information to client communications and social media
- [ ] Send hard-copy or emailed invitations with details once attendees confirm plans to attend
- [ ] Document RSVPs in CRM event campaign or event tracking system
- [ ] Reconfirm venue details, including any audio/visual needs
- [ ] Request professional/expert biography for introduction (if applicable)
- [ ] If an outside event, have umbrellas prepared and/or do event near area with shelter
- [ ] Have company logo and banners etc. around the venue so others who are at the venue can see your logo and get intrigued by your event (could lead to new prospects!)
- [ ] If parking for the venue of the event is far away, consider hiring a valet service is the venue itself doesn't offer one.

2 Weeks Prior to Event

- [ ] Continually monitor and track RSVPs

1 Week Prior to Event

- [ ] Confirm RSVP numbers to venue & food/beverage vendor
- [ ] Send email reminder to confirmed attendees

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24 Hours Prior to Event

- [ ] Confirm attendance:
    - » Team member calls clients
    - » Advisor calls prospects & COIs (if attending)

- [ ] Confirm final attendee number & timing with food and beverage vendor

- [ ] Hold team huddle with final event details and expectations
    - » Review the attendee list, including final number attending
    - » Review event details: time to arrive at the event, location, special parking instructions, and proper attire for the event
    - » Reminder to bring individual company name badges
    - » If event being held in the office, reminder to ensure individual offices are clean and all client data is out of sight
    - » Confirm everyone is on the same page with event roles – who will be doing what
    - » If your event is a large event with assigned seating, make sure to assign staff to different tables
    - » Confirm final preparation checklist items are assigned
    - » Answer any outstanding questions

- [ ] Print name badges

- [ ] Print attendee check-in list

- [ ] Prepare event supply box:
    - » Printed name badges
    - » Attendee check-in list
    - » Blank name badges
    - » Black markers
    - » Pens
    - » Business cards
    - » Post-it notes
    - » Notepad
    - » Scissors
    - » Paper clips and scotch tape
    - » Extra batteries/light bulbs if applicable
    - » Signs for check-in table
    - » Sign-in sheet for those who didn't RSVP (name & contact info)

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Day of Event

- [ ] Print any last-minute name badges

Hours Prior to Event

- [ ] Check in with venue manager and professional/expert
- [ ] Verify venue signage is correct
- [ ] Organize check-in table

Post-Event

- [ ] Pack up event supplies
- [ ] Debrief with team
- [ ] Follow up with prospects & referrals who attended within 2 days (if necessary)
- [ ] Send "Thank You" email to clients and ask for feedback
- [ ] If a new event, or one that you would like specific feedback on, add the client event to your next Advisor Council agenda meeting
- [ ] Compile any compliance required documents and submit them

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