

Client Appreciation Event Process Template

Process: Client Appreciation Event Process

Description: This process should be used when planning and executing client appreciation events.

Category: Client Events

Keywords: Client Events / Appreciation Events / Client Appreciation Events / Client Parties / Annual Client Event

Last Updated: (Date) **Updated By:** (Name)

Locations Referenced:

- CRM – Workflow – Client Appreciation Events

PROCESS DETAILS:

STEP #	WHAT	WHEN	WHO
1	Determine event type, date/time	14 weeks prior to event	Events Manager
2	Notify required team members; calendar invite	14 weeks prior to event	Events Manager
3	Develop event budget	14 weeks prior to event	Events Manager/CFO
4	Determine targeted client segments to invite	14 weeks prior to event	Events Manager
5	Book venue	12 weeks prior to event	Events Manager
6	Hire speakers/entertainment	12 weeks prior to event	Events Manager
7	Develop customized event checklist	12 weeks prior to event	Events Manager
8	Arrange for necessary equipment rentals	12 weeks prior to event	Events Manager
9	Create event in online RSVP system	8 weeks prior to event	Events Manager
10	Create event invitation, submit to compliance	8 weeks prior to event	Events Manager/CCO
11	Finalize invitee list	6 weeks prior to event	Events Manager
12	Reconfirm bookings	6 weeks prior to event	Events Manager
13	Mail or email the invitations to clients	6-4 weeks prior to event	Events Manager
14	Maintain RSVP record	4-2 weeks prior to event	Events Manager
15	Send invitation reminder email	2 weeks prior & week of	Events Manager
16	Complete event preparation checklist, maintain budget requirements	1 week prior to event	Events Manager
17	Review agenda and RSVP list with Advisor and Team	1 week prior to event	Events Manager
18	Event set up and final preparations	Day of event	Events Manager

19	Event check-in desk, record attendees	1 hour prior to event	Events Manager
20	Pack up equipment and other materials	After event	Events Manager
21	Input client attendee data in CRM	1 day after event	Events Manager
22	Send Thank You email to attending clients and speaker(s)	2 days after event	Events Manager
23	Complete post-event compliance items	Within 1 week after event	Events Manager/CCO