

Educational Event Checklist

Event:

Date & Time:

Location:

Contact:

Phone Number:

Email Address:

Professional:

Contact:

Phone Number:

Email Address:

Special Notes:

12 Weeks Prior to Event

Determine event topic/activity

Determine budget

Solicit sponsorship (wholesaler) support (if necessary)

Set date & time of event

Book venue

Place event on calendars of advisor and others in the office who should attend

Block out client and prospect follow-up time after the event

Book professional/expert, if needed

Make food and beverage arrangements

Determine clients, prospects, and COIs to invite

Design invitations and submit to compliance for approval (if necessary)

Customize event evaluation sheets

Order hard-copy invitations (if necessary)

Set up event in CRM or online event tracking system

4-6 Weeks Prior to Event

Advisor verbally invite attendees followed by emailed save the date

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)

Advisor reviews speaker content and provides feedback (if having outside speaker)

2-3 Weeks Prior to Event

Advisor review Opening & Closing Scripts and agenda

Advisor rehearse and time presentation

Verify compliance approval of presentation (or outside presentation)

Record RSVP voicemail message

Continually monitor and track RSVPs

Call clients who have confirmed attendance without a guest

1 Week Prior to Event

Continually monitor and track RSVPs

Confirm RSVP numbers to venue & food/beverage vendor

Send email reminder to confirmed attendees

Assemble prospect packets

Print event evaluation sheets

Begin printing name badges. Consider the following formatting, which several advisors have found to be helpful:

- » Names appear in ALL CAPITAL letters if a CLIENT.
- » Names appear in Proper Case letters if a Prospect or Guest.
- » Names appear in Italics if a Vendor, Presenter, or Employee.
- » Small gray dot in the lower left-hand corner represents the attendee had a birthday in the last 30 days.
- » Small gray dot in the lower middle of the nametag represents the attendee's birthday is the day of the event.
- » Small gray dot in the lower right-hand corner represents the attendee has a birthday within the next 30 days.
- » Ensure name badges are reviewed for correct spelling, and group them alphabetically by couples or families.

Begin preparing event supply box:

- » Printed name badges, and blank ones
- » Evaluation sheets
- » Remote mouse
- » Attendee check-in list
- » Blank name badges
- » Black markers
- » Pens
- » Prospect Packets
- » Laptop and cords (including extension cord)
- » Back-up copy of presentation
- » Business cards
- » Post-it notes
- » Notepad

- » Scissors
- » Paper clips and scotch tape
- » Extra batteries/light bulbs (if applicable)
- » Signs for check-in table (e.g., Last Name A-G)
- » Sign-in sheet for those who didn't RSVP (name, address, phone & email)
- » Bowl for drawing (if applicable)
- » Prize for drawing (if applicable)
- » Speaker's materials if shipped to advisor's office

24 Hours Prior to Event

Confirm attendance:

- » Team member calls clients
- » Advisor calls prospects & COIs

Confirm final attendee number & timing with food and beverage vendor

Hold team huddle with final event details and expectations

Print attendee check-in list

Day of Event

Print any last-minute name badges

Provide advisor with list of team members attending

Double-check event supply box contents and bring

Hours Prior to Event

Check in with venue manager, caterer, and A/V technician

Check in with professional/expert speaker (if applicable)

Verify venue signage is correct

Place water on podium for each speaker

Set-up laptop so presenter can view without looking at screen

Verify presentation, clicker and microphones are working properly

Locate light switches and volume control

Organize check-in table

- » Place signs on table to organize attendees alphabetically by last name
- » Place name badges on table in order, or in expandable files in location corresponding with signs place on table
- » Place prospect packets and any handouts on table
- » Place blank name badges and sign-in sheet with other badges or expandable file

Place evaluation with pen on each attendee's chair

Post-Event

Collect evaluations and pens

Pack up event supplies and equipment brought from office

Debrief with team

Follow up with prospects & referrals who attended within 2 days

Compile evaluations and distribute report to team

Compile compliance requirements for events

- » Invitees and attendees
- » Handouts
- » Invitation
- » Presentation/slides
- » Copy of radio advertisement and dates it ran
- » Copy of printed advertisement with publication name and dates it ran
- » List of clients emailed the invitation, and copy of email reminders



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