

Passion Prospecting Checklist

Event:

Date and time:

Location:

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

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

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)

2 Weeks Prior to Event

Continually monitor and track RSVPs

Call clients who have confirmed attendance without a guest

1 Week Prior to Event

Confirm RSVP numbers to venue & food/beverage vendor

Send email reminder to confirmed attendees

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 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)

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

