

Client and Prospect Event Best Practices Guide

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Pre-Event

Event Design

- Determine objective
- Choose a date without major conflicts
- Develop agenda and content
- Determine budget
- Source and confirm location
- Identify target audience

Communications

- Send save the date
- Invite and confirm speakers
- Send attendee invites and reminders
- Send pre-event survey, if applicable
- Pull registration reports/RSVPs
- Send prep work or reading materials, if applicable

Logistics

- Schedule prep calls with speakers
- Confirm travel logistics for attendees and speakers
- Order food and beverage
- Finalize presentation and/or content
- Order audiovisual (A/V) requirements
- Send attendees confirmation details
- Document logistics for day of event
- Create onsite materials
- Develop seating plans, if applicable
- Review details with venue

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During Event

- Put up directional signage
- Add event information to hotel reader boards if applicable
- Confirm ground transportation arrivals
- Greet guests
- Hand out meeting materials
- Ensure A/V technician is available
- Set up presentation
- Get speakers mic'd
- Ensure food and beverage arrival
- Refer to event agenda
- Network and discuss interests, talents, and skills with attendees
- Refer to day-of logistics document
- Remember to smile!

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Post Event

- Send survey
- Send follow-up email with:
 - Presentation
 - Additional resources
 - Attendee list
- Determine key takeaways and next steps
- Gather attendee information in your CRM
- Schedule debrief with team
- Discuss next steps with team

Effective Virtual Events

Remember that best practices for in-person events still apply in the virtual world! In addition, below are best practices to consider specific to hosting a virtual event:

- Have designated tech support available for attendees (e.g. have someone manage a group mailbox where attendees can report tech issues)
- Leverage tools like polls, chat, breakout rooms, and reactions to create more engagement
- Remind attendees to register and login with the same email to help avoid issues with logging in or breakout room assignments
- For highly interactive events, keep participation to 10 or fewer attendees or break out room participants

When choosing event themes and topics, keep in mind that many, but not all, will work well in a virtual environment. View themes and topics best suited for a virtual event on the next page.

Event Topics and Themes

Non-Financial Education

- Accessorizing on a budget during a department store trip
- Attend your client's favorite charity event
- Custom suit fittings
- Listen to a local historian talk about your city in a venue such as a town hall, library, or theatre
- Mother's/Father's Day: paint a picture frame at a local pottery studio
- Parenting CPR
- Photoshoot with professional photographer
- Rent out a movie theatre
- Self-defense class

Suitable for in-person and virtual

- Alzheimer's awareness
- Couples communication workshop
- Cyber security
- Health and wellness event with a fitness professional or nutritionist
- iPod/iPad tips and tricks
- Painting class
- Partner with a career center to present in front of unemployed workers
- Considerations for virtual learning
- Navigating social-media privacy

Financial Education

- Host a tradeshow booth
- Opening a new office

Suitable for in-person and virtual

- Dealing with concentrated security positions
- Downsizing
- Financial literacy
- Philanthropic
- Social Security seminars
- Tax for business owners
- Tutorial for downloading and using Skype/Facetime
- Will and estate reviews
- With CPAs for CE credit

Social

- Antiques roadshow
- Family holiday reception
- Golf clinic with pro
- Hayrides, pumpkin- and apple-picking
- Oyster shucking
- Rent a food truck
- Sporting event
- Test-drive a Tesla
- Whale watching
- In-person wine tasting or send supplies for virtual at-home tasting
- Brew your own beer
- Boat cruise

Suitable for in-person and virtual

- Book club
- In-person cooking classes or virtually cooking a meal kit
- Trivia night



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