**Client Event Checklist**

Note: This checklist can be used by the person responsible for coordinating events and should be modified as required based on the specific event being delivered.

❒ 90 days (or more) prior to the event, confirm the type of client appreciation event you wish to have and when.

❒ 60 days (or more) prior to the event, identify if outside experts and/or specific venue are required, based on the event.

❒ RSVP your event expert and confirm date, time and place.

❒ RSVP your venue and confirm logistics for date, time and place.

* + - 45 days prior to the event, identify those you wish to invite: your AAA or preferred clients.

❒ 45 days prior to the event, create the invitations. Make them interesting & never email them.

* + - Theme or brand the event with a catchy name.

❒ 45 days prior to the event, coordinate event logistics (food, supplies, IT, order item to anchor event – the gift)

❒ 30 days prior to the event, mail the invitations and carefully track RSVPs.

❒ 30 days prior to the event, ensure you have the anchor gift for the event.

❒ 2 weeks prior to the event, have someone from your team go to the venue and finalize the details (if required).

❒ 2 weeks prior to the event, send confirmations to clients who have RSVP’d and follow up with those who have not RSVP’d.

❒ 2 to 3 days prior to the event, make confirmation calls to all attending the event.

❒ Day OF the event, have someone from your team arrive early to make sure everything is in order. Make sure you and your team are on time.

❒ Day AFTER the event, mail thank-you cards. Be sure to include the event anchor if it was not distributed at the event itself.

❒ On your next Relationship Call, thank them for coming and ask if they have any suggestions or feedback for next time.