**Client Event Process Sample – Appreciation Event**

## **Date:** [Enter Date]

## **Person Responsible:** Client Service Manager

## **Frequency:** As determined by the Advisor

## **Process:**

NOTE: This process can be used by the person responsible for coordinating events.

1. Confirm the type of Client Appreciation Event you wish to have and when. This should be a ***Lifestyle Event.***
2. Choose a date, secure the venue, and contact any other third parties needed.
3. Eight weeks prior to the Event, the Client Service Manger will confirm with the Advisor the names of the clients invited to the Client Appreciation Event. You should only consider your **AAA clients.**
4. Six weeks prior to the Event, the Client Service Manager is to confirm the event details with Advisor (this includes date/time/venue) and any third-party vendors necessary to host the Client Appreciation Event.
5. Five weeks prior to the Client Appreciation Event, the Client Service Manager is to order event supplies, including items used to anchor or follow the event and set up catering and audio-visual arrangements (if required). **Important - this time frame may vary depending on venue/vendor requirements**.
6. Five weeks prior to the Event, the Client Service Manager is to prepare the invitations. Use the **Event Invitation Sample** found in the Event folder, sub folder Resources as a guide.
   * Hand-write the envelope
   * Use an interesting postage stamp (do not use a postage meter)
7. Four weeks prior, mail the invitation.
8. Two and half weeks prior to the Client Appreciation Event, the Client Service Manager can confirm the RSVPs and check with the clients to see if they will be bringing guests. The Client Service Manager needs to ask for mailing information for the Guest. Refer to Event folder, sub folder Resources.
9. Two weeks prior to the event, mail a personal card to confirmed guests - refer to **Introduction Kit Handwritten Card for Guests** found in the Event folder, sub folder Resources, with your **Introduction Kit.**
10. Two weeks prior to the Event, the Client Service Manager will confirm with the Advisor the number of attendees expected, and confirm with catering, venue, and vendor contacts (if required).
11. One week before the Event the Client Service Manager will confirm the following:
    * Ensure all event materials are on site by contacting the venue.
    * If you have invited a guest speaker, confirm that they know where to be and when to arrive and has everything he or she needs (encourage this person to arrive early as well).
12. Day of event:
    * Pre-complete any participant registration forms, and have your assistant gather any other necessary information at the Event.
    * Arrive early, and have your assistant arrive early to help you with all the details.
    * Set up any visual aids and make any last-minute adjustments to the room.
    * Have your assistant give each participant a name tag. Since you should know who is attending before the Event, you can have these pre-printed, but do keep a few extras on hand for last-minute changes. Advisor and Staff need to have name tags.
    * Greet each participant by name as they arrive, and work at making them feel comfortable. This is a great opportunity to connect with your clients on a personal level, and to enhance trust. This goes a long way to creating long-term clients and advocates.
13. One day after the Event, the Client Service Manager will mail out Thank You Cards to all those who attended. See **Post Event-Thank You Card Template**in the Event folder, sub folder Resources.
14. One week after the event, personally call all event attendees to thank them for coming and ask if they have any suggestions or feedback for next time. Document feedback, this will serve to help fine-tune future events.