“How To” Event Process – Ready, Set, Sales!™
(a.k.a. Pre, Present, Post)

Why it’s important:

Ready, Set, Sales!™ is a concept that essentially helps you look at any event from 3 angles – the pre-event stage, the present-event stage, or the post-event stage. From this perspective, you have a high likelihood of making each phase of that event a strategic success. Because you may invest considerable time and money in your events, it’s important that you adopt a pre/present/post focus so that you keep in mind the big picture as well as the smaller details. This 3-tiered vantage point will ensure your key objectives will be met at each phase. It’s also important that you delegate properly and that everyone is clear on expectations and deadlines. The chart in this section serves the purpose of thinking through many of the details for you but – because it’s broken down in a pre/present/post format – it will also help you think strategically and tactically about how you will maximize the return in each phase of the process. Don’t forget all sales come from the Post Phase – meaning you’ll want to have plenty of tactics for leveraging the experience after it’s occurred.

When to use:

When preparing for any big or small event – for example: a client appreciation event, a prospecting event, a seminar, workshop, speaking opportunity, even breakfast and lunch with clients or prospects.

How to use:

Simply follow the outline of the chart and insert your own steps. Then circulate to anyone involved and use the chart to guide you through your management and communications processes.

With whom to use:

Anyone involved in the process – executives, administrative support, interns, producers, strategic alliances, sponsors, etc.

Real life example:

When holding a board of directors meeting in the food market one sunny summer evening in Philadelphia, everything had been set – however, only two out of 12 Board members arrive for the highly anticipated evening! Being a master of *"Ready, Set, Sales!™"* thinking and quick on his feet, the advisor turned the evening on its head. He explained to the two board members, "Since you are our most active board members and we've learned so much from you over the years, we wanted to have a dinner in your honor and just hear about your business today – what keeps you up at night, what do you look forward to in the next few years in your industry and how can we help serve you?" The evening that could have been a disaster turned out to be a big success and was documented with photographs of the two business owners and the highlights of their conversation in a newsletter that was sent to the entire food market in Philadelphia.

Ready, Set, Sales!™

Sample Event "How To" Process

Example event: Vertical Marketing Seminar with over 100 Business Owners and Professionals from Market.

Ready…

	Pre-Event Action Items	Who?	When?	Results
	Establish Success Indicators – Goals should be for number of referred leads, appointments & sales			
	Choose location and date			
	Define best profile for audience			
	Identify clients who fit best profile (assume guest)			
	Identify prospects who will be invited			
	Determine if sponsors or charity will be involved			
	Confirm details of formal contract (if necessary)			
	Determine scope of menu			
	Estimate cost per person			
	Book A/V professional and/or photographer			
	Develop and setup tasting prior to event, agenda and other aspects of event, i.e. raffle or benefit for charity			
	Coordinate donations/commitments from vendors and sponsors; obtain logos for invitation			
	Get client/prospecting lists from sponsors			
	If other speakers or a panel are used, have conversation to determine topics and make clear your specific expectations			
	Begin to formulate event presentation material			

	Pre-Event Action Items	Who?	When?	Results
	Send sample agenda and confirmation letters to sponsors			
	Send vendor materials (actual educational materials and draft of invites) to compliance for approval			
	Get biographies of speakers			
	Get 3 quotes for invitation design			
	Ensure that all clients and prospects are in database; set up separate file for invite mailing			
	Email or fax “Save the Date” flyer			
	Order formal invitations & reply cards			
	Mail invitations w/ reply card or RSVP#			
	Enter confirmed registrations in database			
	Call all registered to confirm			
	Call all confirmed non-attendees to convey regrets and promise follow-up materials			
	Call all non-responders to convert to registrations			
	Make on-site visit to map out event flow; ensure adequate A/V equipment, i.e. mikes; test out to ensure success, room setting etc.			
	Obtain any handout materials from sponsors /vendors in advance			
	Create event packages including evaluation sheet			
	Create name tags for all registered guests			
	Write press release and submit to local press			
	Order any A/V equipment that may be necessary, i.e., big screen or lavaliere microphone			
	Order pencils and pads			
	Determine if any special seating arrangements are advisable for ease of networking			

	Pre-Event Action Items	Who?	When?	Results
	Review Post-Event activities and set aside time in calendar			
	Engage a writer to summarize highlights of event for post-event follow-up flyer; give them as much information in advance to avoid delays after the event			
	Create signs: i.e., “Welcome” from you the host and sponsors and “Please turn off cell phones” sign			
	Identify items such as presentation notes, event photo album or gift to use to personally deliver to all prospects post-event			
	Obtain prices for post-event follow-up item/gift			
	Block time on calendar to meet with attending prospects and deliver memento post-event			
	Run through presentation with all speakers			
	Additional notes:			

Set…

	Actual Event Action Items	Who?	When?	Results
	Sales / Service Team are positioned for networking only			
	Your team have success indicators in mind, i.e., expecting specific introductions and scheduling of follow up appointments			
	Greet attendees at door and guide to registration			
	Registration is organized so that no one waits more than 5 min.			
	Room is arranged to look full; food is in central area if buffet or cocktails to keep people mingling in the middle			
	A/V and lighting has been checked again			
	Event packages, pencils and pads at each table; centerpieces as appropriate			
	Vendors/Sponsors have favorable exposure; if tables are set up for raffles, they are in full view and well appointed.			
	Written speeches and presentation materials are at the ready			
	Event starts on time			
	Relay any housekeeping comments at start			
	Additional notes:			

…SALES!

	Post-Event Action Items	Who?	When?	Results
	Send thank you notes to all sponsors/vendors and speakers (as appropriate)			
	Develop photos, edit video or audio			
	Print summary newsletter			
	Call every attendee and non-attendee			
	Make appointments to drop off "memento" from the event: photo, book, etc.			
	Track appointments made in database			
	Consider post-event press release (depending on success of pre-event release)			
	Incorporate all attendees and non-attendees into ongoing cultivation system			
	Send attendee and non-attendee thank you letters			
	Additional notes:			