

White Glove Referral Event Planning Timeline

Event Name:

Date & Time:

Client Host:

Venue:

Venue Contact:

Venue Contact Email:

Venue Contact Phone:

Vendors Involved:

Vendor Contact Email:

Vendor Contact Phone:

Notes:

12 Weeks Prior to Event

- Identify client host
- Brainstorm 3 custom events
- Identify 3 potential event dates
- Call venues to see if they are available
- Scout venues if necessary
- Determine budget/get pricing
- Put placeholders on the calendar

8 - 10 Weeks Prior to Event

- Contact client host
- Pick the date and event
- Research any other event ideas the client might have (if applicable)
- Book with venue and any applicable vendors
- Determine food & beverages – supplier
- Have client reach out to potential guests
- Book time on calendar for the advisor to work on short talk before event
- Book time on calendar for follow ups after the event

6-8 Weeks Prior to Event

- Contact client host and check in on guest status
- Order any items you'll need for the event (see supply list)
- Reconfirm details with the venue/vendors
- Create timeline for the event (see event schedule template)

2-3 Weeks Prior to Event

- Lock down your talk and practice if necessary
- Assemble any gifts, print any wine bottle tags, print tasting notes, etc.
- Contact client host to check in on guest status to get final numbers
- Meet with team to go through the details of the event
- Print anything you need to take with (sign-in sheet, evaluations, etc)
- Pull birthdays, anniversaries, special notes re: client hosts

1 Weeks Prior to Event

- Contact client host
- Pack up supply boxes for the event
- Practice your talk
- Send note to client about how excited you are
- Touch base with venue to confirm any last-minute details

Day of Event

- Team meeting to set intention for the event, assign jobs, and just confirm details
- Load event supply boxes, tables, etc into cars
- Arrive at venue and make sure everything is exactly the way you want it
- Run through schedule with the venue
- HAVE FUN WITH IT!!!!

Post-Event

- Create follow up tasks in CRM (follow post-event follow up process)
- Debrief with team
 - This is how you create a process: what would you change? What would you add?
 - Follow up with the venue if you plan on doing it again and debrief with them as well!
- Establish how you will track event results
- Make a note for your next CEO Day to check in on results 6 months out, 12 months out, etc.