



INTRODUCTION

In order to have meaningful impact, a client event must support your overall marketing plan and your key marketing strategies. Typically, events are a tactic to support:

- > Client Loyalty: Strengthens your relationship with your top clients and enhances your image.
- > Prospecting: Creates an opportunity for clients to personally introduce you to potential prospects (guests).
- > Philanthropy: Shows your philanthropic support of your community and raises funds for a cause, such as Alex's Lemonade Stand Foundation.

You should define specific objectives for your event (see success criteria below). Client events can require a significant investment of resources – so this document is designed to help you maximize your ROI.

- Begin planning for your event at least 90 days prior to the event date. Many events, however, will take more than 90 days to plan.
- Define success for your event: When this event is over, how will we know if it was a success (more than just – “it was a great event”)? Set quantifiable measures such as:
 - Number of attendees, number of guests
 - Number of favorable introductions and/or cases open
 - Production
 - Dollars raised for philanthropic cause
- Thoroughly plan each aspect of your event – from pre-event activities, to what will happen at the event, and most importantly, your post-event tracking and follow-up.

RESOURCES FOR ALL EVENTS

- [Event Websites](#)
- [Planning Checklist](#)
- [Ideas & Tips for Selecting an Event](#)
- [Documenting Your Event - Example](#)
- [Event Do's and Don'ts](#)

RESOURCES FOR PHILANTHROPIC EVENTS

- [Money Administration](#)
- [Using Matching Gifts](#)
- [Event Tax Receipts](#)
- [Sponsorship Package Template](#)
- [ALSF 501c3](#)

The Northwestern Brand

Northwestern Mutual has worked hard to create a brand that helps you to strengthen relationships with existing clients as well as create opportunities with new prospective clients.

As part of your event planning, consider the following:

- *Is this event appropriate and representative of the brand?*
- *How can I reinforce the brand by using approved/branded materials?*

For more help in aligning your event with the brand, contact the Marketing Resource Center (866-692-9165).

EVENT PLANNING CHECKLIST

Look for tips by hovering over any cell where you see a "◆".

PRE-EVENT ACTIVITIES

| | ITEM | ASSIGNED TO | DUE DATE | STATUS |
|------------|---|-------------|----------|--------|
| 3-6 MONTHS | Establish success criteria | | | |
| | Discuss who will have primary responsibility ownership for planning and executing this event ◆ | | | |
| | Establish budget | | | |
| | Determine type of event | | | |
| | Decide on location, date and time | | | |
| | Establish a contact at your venue | | | |
| | Book caterer and/or entertainment (if appropriate) | | | |
| | Select invitees | | | |
| | Select invitations | | | |
| | Map out a detailed event timeline | | | |
| | If applicable, solicit sponsorships | | | |
| 2-3 MONTHS | Create an event website | | | |
| | Devise invitation timeline ◆ | | | |
| | Consider a Save the Date card and/or making a phone calls to VIP's to ask them to save the date | | | |
| | Establish your follow-up plan ◆ | | | |
| | Select food and beverage ◆ | | | |
| | Select food and beverage | | | |
| | Plan logisitics: ◆ | | | |
| | Track RSVP's - clients and guests | | | |
| | Hire photographer if appropriate | | | |
| | | | | |

EVENT PLANNING CHECKLIST (CONTINUED)

Look for tips by hovering over any cell where you see a "◆".

PRE-EVENT ACTIVITIES

| | ITEM | ASSIGNED TO | DUE DATE | STATUS |
|-----------|--|-------------|----------|--------|
| 1-2 MOS | Send invitations | | | |
| | Track RSVPs - clients and guests | | | |
| | If applicable, accept payments | | | |
| | If applicable, provide matching gift information | | | |
| | | | | |
| 3-4 WEEKS | Review timeline for during the event - assign roles/responsibilities | | | |
| | Review follow-up plan - assign roles/responsibilities ◆ | | | |
| | Schedule post-event debrief meeting | | | |
| | | | | |
| | | | | |
| | | | | |
| 1-2 WEEKS | Make name tags | | | |
| | Assemble gift bags/prizes ◆ | | | |
| | Finalize count for food and beverage/caterer | | | |
| | Hold a "final prep" meeting ◆ | | | |
| | | | | |
| | | | | |

EVENT PLANNING CHECKLIST (CONTINUED)

Look for tips by hovering over any cell where you see a "💡".

DAY OF EVENT

| ITEM | ASSIGNED TO | DUE DATE | STATUS |
|--|-------------|----------|--------|
| Ensure set-up, etc, is as-requested/designed | | | |
| Set up registration/greeting table | | | |
| Relax, have fun and focus on networking | | | |
| | | | |
| | | | |
| | | | |

POST-EVENT FOLLOW-UP

| | ITEM | ASSIGNED TO | DUE DATE | STATUS |
|----------------------|---|-------------|----------|--------|
| WITHIN 1 WEEK AFTER | Hold debrief meeting 💡 | | | |
| | Document expenses as compared to budget | | | |
| | Execute follow-up plan | | | |
| | Post photos of your event site | | | |
| | | | | |
| WITHIN 1 MONTH AFTER | Document all of the event details to streamline planning for next event (see example) | | | |
| | Track results (ongoing) | | | |
| | Evaluate ROI (ongoing) | | | |
| | | | | |
| | | | | |

CLIENT APPRECIATION EVENT IDEAS

Here is a list of possible event ideas – borrow one of these ideas or use it to spark your creativity. Remember – events can be as large as you want, or as small as an intimate dinner for four or golf foursome. Events of all sizes provide an opportunity to build your relationship with your existing top clients *AND* more importantly, create a venue for your best clients to personally introduce you to potential prospects.

TIPS FOR SELECTING YOUR EVENT TYPE:

- What are your success criteria (what are you trying to accomplish? What type of event will best help you achieve the results you desire?)
 - Who is your target audience?
 - Think first about the interests of your top clients.
 - Consider what types of events you would enjoy personally (*it should be fun for you, too*).
 - Determine which events would work best for the time of year and/or day of the week you are targeting based on your desired attendees.
- Select a venue that allows an opportunity for both you and your guests to network. An added bonus for them is to develop other mutually beneficial relationships.
 - Look for a venue where there may be an opportunity for mutual benefit. A luxury car dealership or new restaurant would be excited to have an opportunity to be introduced to the caliber of people you could bring to your event and may be willing to provide their venue at a reduced cost to you and/or to share the cost of refreshments.

SPORTS EVENTS

- > Baseball, basketball or football*
 - Alumni event for college game
 - Behind the scenes tour of sports stadium
- > Golf*
 - Foursome (client + 2 guests)
 - Breakfast featuring a Golf Pro
 - Shotgun start tournament with dinner to follow
- > Tennis or racquetball
- > Fishing trip
- > Trap or skeet shooting
- > Sailing

CULTURAL

- > Wine & cheese tasting*
- > Night at the symphony/theater/museum
- > Cooking school/demonstration
- > Book club
- > Garden tour

FAMILIES

- > Theater (children's movie or play)
- > Father/Son or Mother/Daughter event
- > Pool party
- > Pumpkin carving and hayride
- > 4th of July picnic
- > Sledding/skating party
- > Easter egg hunt/egg coloring
- > Miniature golf

PHILANTHROPIC

- > Gala for ALSF
 - > ALSF night at a local restaurant
- * Any event can be used to raise funds for ALSF. These are the most common.

OTHER

- > Seminars on financial services topic or key business issue
- > Keynote speaker with cocktails & dinner
- > Riverboat trip/dinner cruise
- > Casino night*
- > Microbrewery/pub tour
- > Scavenger hunt
- > Halloween costume party
- > CPR/First Aid class

If your relationships are primarily with the husband and you want to get to know their spouses, consider a "Ladies Event" such as:

- > Spa night / Martinis and Manis
- > Make your own flower arrangement
- > Cake decorating

EVENT DO'S AND DON'TS

Here are the top tips and learnings from other representatives who've held client events:

DO establish your success criteria

Many representatives have spent money on events that felt great for them and their clients, but did not create any meaningful results. Taking the time to think through what you want your event to accomplish will help ensure that your event has the ROI you expect.

DON'T short-cut the time it will take to plan your event

To hold a highly successful event, you and your staff must commit to the time required to plan and execute all of the details. Starting your planning 90 days or more in advance of the targeted event date will help ensure the event runs as smoothly as possible.

DO ask your clients to invite guests

Many representatives have been apprehensive at first about asking their clients to invite a guest to their event – but those who have tried this approach have had tremendous success in being introduced to high-quality new prospects. A high-caliber event is a positive representative of both you and your client. And your best clients are always happy to help you meet others – all you need to do is ask!

DO consider smaller events

Don't be afraid to try a small event – many times, holding multiple small events can create even stronger results than one larger event. For example – consider scheduling golf foursomes or a 6-8 person dinner event. Invite 1-2 clients and 1-2 guests. These intimate settings are ideal for helping you to build a relationship with both your client and their guest(s)...which will ultimately lead to results (with proper follow-through).

DO make personal calls to your clients

If you want the best turnout for your event, you need to plan time to make personal calls to your clients. Consider placing a call in advance of the invitation – letting them know about the event. Be sure to call 24-48 hours prior to the event as a quick reminder of how much you are looking forward to seeing them.

DO plan your post-event follow-through

What you do AFTER the event is just as important (if not more so!) than all the work you did prior to and during the event. It's where you generate your ROI by reaching out to clients and guests who attended on a timely basis and in a way that connects them back to their great experience. Remember: the longer you wait, the less impactful your results.

DON'T forget about those invitees who couldn't attend

Your follow-through plan should also include reaching out in some way to those clients you invited but were unable to attend. You can share photos from the event, bring them the parting gift (if appropriate) – and still create a “reason to see” that can impact your ROI.

DO bring the camera

Whether you hire a professional photographer or assign this task to a talented member of your staff – be sure someone is taking pictures throughout your event. These can be used as a post-event gift and/or they can be posted to your website to showcase the incredible and unique experience you provide to your clients.

DON'T forget to document and track results

Be sure to set the expectation that whoever is the lead on event planning details needs to document exactly what they did, in as much detail as possible. For example – keep a copy of your invitation with notes on who designed it and where you ordered it; keep the details from the menu – what you served, who catered, etc. This will be an incredible time-saver for you and your staff when you do your next event. In addition, be sure to track your budget versus actual expenses, along with referrals received, cases written, etc. so that you can calculate your ROI.

Client Event Planning

EVENT DO'S AND DON'TS
