

# Prospective Member Event Checklist

## PHASE 1: PLANNING

- Identify dates & prospects for invite
- Discuss plans with club leadership
- Establish budget, forecast costs, forecast attendance, & expected results/ ROI
- Discuss theme for event

## PHASE 2: MARKETING

- Create personalized invites for hottest leads
- Spread the word internally
- Create flyers, marketing materials, RSVP list, etc
- Documents ready for prospects to sign up

## PHASE 3: DAY OF

- Ensure all department heads, key staff members, etc are aware & ready
- Be visible & plan introductions to staff, other members, etc
- Spend quality time ensuring prospects are enjoying the event, work on trial closes

## PHASE 4: POST-EVENT

- Follow-up, overcome objectives, close deals
- Handwritten thank you's

