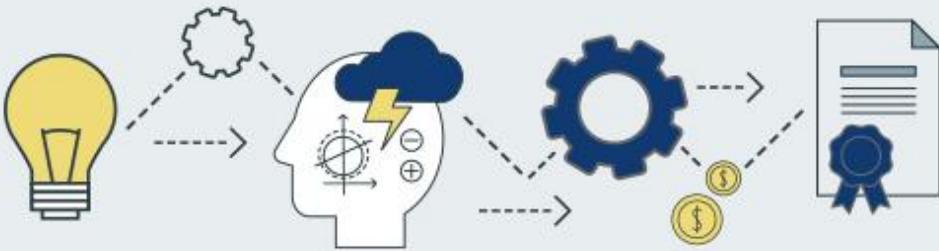


SOLUTIONS ADVISORS

Values driven. Results focused. Senior living experts.



The Evolution of an Event

Part 2: Event Preparation

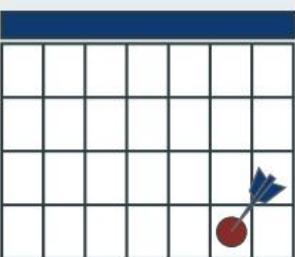
Last month's newsletter emphasized the importance of developing a strategic event plan and establishing a goal for each event, whether it's new lead generation, advancement or conversion. This month we provide helpful tips on event preparation and offer a checklist and other helpful tools to manage the process.

TREAT EACH RSVP AS A NEW INQUIRY



Treat each RSVP as a new inquiry - It is important to handle each RSVP as a new inquiry. At The Clare in Chicago for example, the front desk forwards all inquiries to the sales office where the sales team intercepts each RSVP. This immediately starts relationship-building with prospects and enables the sales team to conduct initial discovery to collect some background information in advance of the event. This process also gives the sales team the opportunity to steer away the dreaded 'munchers' or 'frequent fliers' who fill seats but often have little intention of moving. Additionally, this enables the sales team to strategically sell during the event instead of waiting until afterwards to start the sales process.

ONE MONTH OUT



One month out - The Clare uses a "BEO" (Banquet Event Order) to layout all details of the event including room set up, event menu, equipment needs, etc. A sales team meeting is held to review the mailing list and invitation so they know which prospects have been invited and what they were sent. ([Click here for a sample BEO form.](#))

TWO WEEKS OUT



Two weeks out - Another sales team meeting is held to flesh out specifics depending on the type of event. For an open house for example: Who will be giving guided tours - what times are tours and what is the tour route? The sales team should plot out the tour route and stagger the route so they don't run into each other. Resident ambassadors should be stationed in the models to point out key features of the apartment. If possible, the ambassadors should be located in the type of apartment they actually live in so they can point out the characteristics they are personally familiar with and describe how they live in their home.

ONE WEEK OUT



One week out - Establish who will be calling all prospects to confirm attendance. If food is being served, meet with culinary staff to review menu details and type of service, (i.e., sit down, buffet, served hors d'oeuvres, etc.) and banquet needs. Meet with grounds and housekeeping staff to alert them to prepare for additional parking or housekeeping needs. If using resident ambassadors, be sure they are coached on their role and responsibilities.

THE DAY BEFORE



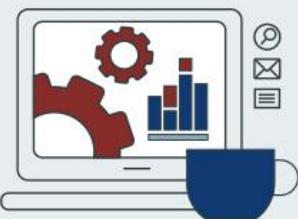
Day before - Have a sales team meeting to briefly discuss any hot prospects who are coming and any notes you have on each prospect so the entire team is aware of who is attending, their background and stage of readiness. Review room set up and audio-visual needs. Review your checklist!

THE DAY OF



Day of event - Color-code prospect name tags for strategic selling. For example, you can color code new prospects (not in the lead base) green and those "hot" leads or in action phase, red. Color coding according to the prospect's stage of readiness and whether or not they are new will alert the sales team as to how to approach the prospect and can advance sales quicker. Have your resident ambassadors then focus on those labeled in red (hot and in action stage) so the sales team can focus on those in green (new). Make sure all staff including management staff and resident ambassadors have professional-looking name tags and know what the colors mean. Make sure directional signage is present if needed. Check public restrooms for cleanliness. Avoid issues with "do not call" lists by preparing a registration card for prospects to fill out which gives the sales team permission to call in the future. ([Click here for a sample registration card.](#))

POST-EVENT RECAP



Post-Event Recap - A day or two following the event gather the sales team to review and evaluate the outcome. Was the event successful? How many attended? Did the right prospects attend? What went right? What went wrong? What could have been done better? All of these comments should be documented in memo or spreadsheet for future reference. Additionally, review notes taken on prospects and conversations during the event and be sure they are all captured in the database for identifying next steps.

Next Up: Part 3 of our *The Evolution of an Event* series - learn the importance of having a strategic follow up plan.

Mark your calendar!

Visit the Solutions Advisors booth #68 at **Leading Age PA** June 15 & 16, 2016 in Hershey, PA!

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