

## ***Here Are 10 Things You Need To Do To Host A Client Appreciation Event To Close Out Or Kick Off A New Year!***

Client appreciation - just like any other event - should not be confined solely to clients. Rather, we suggest you invite and welcome all sorts of “friends” of the firm. Friends include allied advisors, prospective clients, advisory board members, vendors, family members of clients and even encourage these folks to bring along possible future clients. In the words of Dan Sullivan, Founder and President of The Strategic Coach Inc., take each opportunity – especially, these larger gatherings – to do 3 basic, yet exquisite things with your brand, your firm and your staff: “protect,” “showcase,” and “magnify”. You cannot be ill-served by getting the word out on your firm’s differentiating value proposition and broadcasting repeatedly to clients, allies and prospects alike.

Here are our top 10 critical elements in pulling off a well-attended, well-received and results-oriented appreciation event.

### **1. Pre-planning Is King**

If you spend some time answering the following questions, the rest of your planning will naturally fall into place. We like to start by answering the age-old questions of Who? What? Where? When? Why? and How?

**Who** – Who is likely to attend and who do you want there? Sometimes the answers to both these questions are different, so put them all on the list. We recommend inviting all friends of the firm including your top clients and their adult family, advisors, vendors, advisory board members and even prospect clients.

**What** – What do you want to accomplish by having this event – create appointments, sell your product or promote good will? By setting clear expectations of why you are doing this event, you will be able to develop and create the most appropriate event.

Think about the type of event you want to have and your budget. Does your budget allow to offer a meal and hosted bar? Will your attendees want to simply socialize or will they want to hear a presentation? Will you be giving awards? Do you want entertainment, a photographer, special decorations?

We have found that even if you plan to share a product or strategic presentation, positioning the event as a “client appreciation” or “friend of the firm appreciation event” - inclusive of mingling, food, wine and music – is bound to have more attendees and a more festive ambiance.

**Where** – We like to recommend restaurants that are centrally located to where your guests will be coming from. So think about whether they will be coming from work or home and plan on a central location. Italian restaurants tend to offer a variety of food and beverage choices that please all palettes and have vegetarian options as well, all at reasonable prices. Steak houses are more expensive and more restrictive in their food choices, yet can offer a more sophisticated ambiance. Hotels are our last choice as the price points tend to be higher and there are more extras and fees. In our experience, hotels are almost double the price of a mainstream Italian restaurant.

**When** – Pick a time that you feel will suit your guests. Do they work and prefer an after work time – do they tend to favor lunchtime events? If alcohol will be served, we recommend an evening event. If you choose to do a luncheon – 11:30-1:00 is a good time so that guests still have their afternoon free. If choosing to do an evening event, 6:00 is usually safe to accommodate those that are coming from work and evening traffic.

We highly recommend having a “check-in” time 30 minutes prior to the start time, i.e. 11-11:30 or 5:30-6 so that people don’t all show up all at once and have the ability to start right on time without making the people who did show up on time wait for others who are late.

**Why** – By hosting an annual event or several throughout the year, you remain uppermost in the minds of your clients and other friends of the firm. You never know when an opportunity will arise that they will have a need to talk to you and utilize your services. If you make the time to visit with them socially it will help build your relationships so that you are top of mind with them when they need you.

**How** – By pre-planning, creating effective invitations, paying attention to the details and implementing effective follow-up you will have a successful event!

## 2. **Pick A Date**

Ideally you will want to start planning 2-3 months in advance. Once you know how to plan an event, you can start to give yourself less time, but it takes time to do the research and get the vendors in place. Venues also book up so pre planning gives you the advantage to choose your first venue choice and time. Make sure to check your personal and business calendars as well as calendars of any key staff members that you need to be there to make sure they are all clear. There is no right or wrong time to have this type of event. We only recommend staying away from August, Thanksgiving week and mid-December through Christmas, as people’s calendars are always busy these times of year and your attendance will be lower.

## 3. **Secure Your Venue**

Once you have honed in on when and where you want to hold your event, speak to the catering manager and discuss the following:

**Room setup** – Feel free to enlist the input of your catering manager – they have the most experience and are usually happy to help guide you.

Table linens, piped in music and centerpieces are usually part of the setup and included.

A conference-style table is good for 10 people.

A U setup (2 tables facing each other with one table at the top connecting them, in the shape of a U) is great for 10-20 people.

For more than 20 we recommend round tables of 8-10, preferably set for half or three quarter the amount it holds, also known in the catering world as ‘crescent rounds’ which enable your guests to not have to turn their chairs to see you speak.

For a large crowd and to maximize your room space you would need to set full round tables.

**Food** – See if you can have guests choose off the menu or, if a pre-set menu is required, ask to have 2-3 choices available. Typically we opt for a meat, fish and vegetarian dish. If you want to have appetizers, have them available on the table before your presentation. Hungry guests don't pay attention! Limit food service during your presentation and resume when finished.

For a nicer presentation, sit down plated service is the way to go. However at some places, having a buffet is a lot less expensive. We recommend pricing it out and going with whatever option works best for your budget. Make sure to let your servers know that you will want any leftovers if the meal is served buffet or family style. Typically extra food is thrown away, so if it isn't touched you might as well take it for your office or family to enjoy!

**Drinks** – It's a good rule of thumb to limit alcohol consumption before and during any presentation. You should put a limit on choices the wait staff will offer so that 1) your guests don't become too intoxicated and 2) you don't blow your budget. A great tip we want to share is to request that you be charged for all drinks based on consumption only. This way you are only charged for wine bottles opened and beverages actually ordered. Many times catering managers will pre set the amount drinks per person– don't do this; you will spend a lot more in the end. Oftentimes coffee, tea and sodas come with the meal but double-check. If you only want wine and beer to be served and not cocktails, be sure to mention it. Be sure to have your guests restricted to the brands of alcohol and wine you wish to have served – house wines and alcohols are usually pretty good and won't break the bank. Typically for an event like this all drinks should be hosted. It can come across as being rude to make your guests pay for their own drinks. The only exception would be if you decided to offer only wine, beer and champagne and your guest insists he wants a vodka tonic – you can authorize the server to allow this at the charge of the guest.

**Entertainment** – You don't need to go over-the-top here but it is nice to add a little live background music. We prefer a guitarist, pianist or set of string instruments. Any live entertainment will be an additional charge and often is contracted outside the venue. Your catering manager can advise you as to protocol and provide recommendations. Typical rates are about \$800 for 3 hours.

**Audio/Visual (A/V)** – Make sure the venue provides a screen, projector cart, necessary cords and microphones. You will need to plan on providing the projector and computer loaded with the presentation. If you don't have a projector you will need to rent one either from the venue or an outside company. AV is usually an additional charge. Typical fees run about \$75-100 per piece rented.

**Additional items** –

- Ask to have a check-in table at the entry-way, a table at the front for the speaker to put his or her drink on, another at the front for the projector and perhaps even one more to put handouts on.
- It is customary for the facility to charge a deposit. Often this is negotiable but you will need to pay some type of deposit and sign a contract.

- Some venues may want to charge you a room rental, but it's our experience that if you ask, most likely they will waive it for you.
- All venues will require that you meet a food and beverage minimum. This is standard. However, when they quote you a minimum do some simple math based on the food and drinks you choose and the amount of people you will have. If you don't think you will meet the minimum, ask to have it lowered. You want to be sure you get everything you pay for and aren't paying extra.
- If you have someone available to take photos, this is a nice touch.
- It isn't necessary, but you can also arrange for additional decorations or flowers if you have room in your budget.
- You don't have to have assigned seats, but if you prefer to dictate who sits with whom then you should. It's also a good idea to have one staff member at each table to interact with guests rather than have all staff at one table.
- If you find a place that you like, and your guests like, there is no reason you can't hold events at the same place over and over. Guests don't seem to mind and you will end up developing a relationship with the catering manager(s) which helps you negotiate, get more value and preferred VIP status!

#### 4. **Plan Your Invitations**

***Design*** – Make sure to keep your invite congruent to your brand. Simple is best. Be sure to include the basic who? What? When? Where? Why? questions, the location, time and RSVP information. Once you have everything laid out, be sure to have upper management or your broker dealer approve your content.

***List*** – Now that you know who you want to invite, the best way to keep track of your invitees and attendees is on an Excel document. Put all your invitees in the document with columns for first name, last name, address, city, state, zip, email, phone and guest. When RSVPs come in, go to this master document and highlight the yeses in one color and the nos in another. Be sure to add guests' names. Take this list either on your computer or printed to the event to help with check in.

***Email*** – Email invites are our method of choice. They are inexpensive to send and enable you to send out multiple times without blowing your budget. You can design basic templates on [www.constantcontact.com](http://www.constantcontact.com) or your web designer can usually put together something more custom at a reasonable price. We recommend sending out 1-3 times a week starting at 3 weeks in advance of the event if you can. Make sure to remove RSVPS that come in so they don't receive multiple invites after they RSVPd. Tuesdays, Wednesdays and Thursdays are better days to send but sometimes we mix it up and include a weekend day or another day just to try and hit people at different times they would look at their email. Planning to send at 9AM is best. Whomever you use, make sure they send in a way that you won't be delivered as spam.

***Print*** – This is always well received, especially by older guests, but mailed invitations are very expensive compared to email. You can always print on your letterhead or a simple linen paper and limit the amount of colors you use to keep costs down, but typically you are looking at \$1-\$2 each to design, print and mail.

**Promote** – Be sure to add the event to your website, your signature line and any company communication sent out before the event.

**Calls** – If you find your RSVPs are low, it doesn't hurt to pick up the phone and personally invite some of your top guests.

**Confirmation emails/calls** – Send out a reminder or call the day before the event.

**Thank you for attending and sorry we missed you emails** – It is a nice touch to send out an email thanking those who attended and another one to those that cancelled or didn't show. Always offer the fact that you are available for calls or emails should they wish to ask any questions or learn more about what was discussed at the event.

## **5. Make Your List And Check It Twice**

As you start your planning, we HIGHLY recommend that you create a timeline that outlines the task, the date by when it needs to be done and who is responsible. Also include a place for checking it off as complete and a place for comments.

## **6. The Main Event**

Once everyone arrives and sits down, what will you say? What will you present? Will you have a guest speaker? Will you talk about your business successes/challenges for the year? Will you recognize any client's achievements? Will you award or recognize any local businesses in attendance? It's important to have the meat of your event planned out and rehearsed. You can speak freely or create a PowerPoint and handouts if you so choose.

## **7. Staff Up**

Unless you are going to have a daily diet of planning events and plan to ignore your clients, it's important you get help. Ideally it's nice to delegate most or all the tasks to your admin, marketing staff and client relationship managers so all you have to do is work on the presentation and show up. However, this isn't always feasible in which case you might want to consider hiring an outside consultant or temp to help with some of the details.

## **8. Game Time**

Once the event week/day comes you should have everything already together, but here are some additional items you will want to make sure you have prepared and take with you the day of:

- Business cards
- Name tags – Can be blank or pre-printed
- Sign-in list – As mentioned above you can print out your Excel document or simply take your computer and check people in off of your document.
- Packets – This can be copies of the slides, bios, articles or anything you would like your guests to have. You can paper clip the items together or include in a 2-pocket folder.
- Survey – We love passing out a simple survey at the end of the main event. Our survey usually requests attendees to fill out their contact information, rate the speaker and content, fill out what they liked and didn't like as well as offers a place to request a follow-up call or meeting.

- Supplies – It's always a good idea to have an emergency bag with extra pens, tape, paper clips, batteries, an extra pin drive with your presentation in case the one installed doesn't work, and post-its. If your main event warrants, you might want to bring a flip chart and pens as well a high bar stool for you or your speaker to sit on so that you create a more personal warm ambiance as opposed to standing, which is more formal.
- Extras – You might want to think about bringing chocolates (we have small morsels with our logo imprinted on the wrapper), logo'd or non-logo'd notepads and pens.
- Checking out – Don't forget to look at your final bill carefully upon completion just to make sure any additional charges didn't pop up. Also be sure to have your credit card with you and get a receipt for tax purposes.

## **9. Follow-up**

You aren't done when everyone leaves the venue! The most important part of the event is your follow-up. Send out your thank you for joining us and sorry we missed you emails. Check your list and see who attended and who didn't show. Check the surveys and contact everyone immediately who wanted to speak further. It also doesn't hurt to have your assistant call each attendee and offer a no charge/no obligation hour visit.

## **10. Post-Game Huddle**

We know at this point you are probably exhausted and done with the details of your event, but take time out to have a team meeting to determine what worked, what didn't, what you liked and what you would do differently next time. Write down the feedback and be sure to reference it for your next event.

Executing the thousands of details required to seamlessly pull off an event takes a good team and a lot of organization. If you follow our step-by-step guide, you too can look like you have been hosting events for years. Angela York has been planning corporate events for nearly 20 years. For more information, questions, comments or if you need some guidance planning your next event please call 949-422-6530 or email her at [angela@angelayork.com](mailto:angela@angelayork.com).

Happy Planning!

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