**Workshop Checklist:**

**Month Before Workshop**

* **Book Venue/Dates** (5-6 weeks prior to event)
* **Submit Info to LeadJig/Acquire** (4-5 weeks prior to event)
* **Review Mailer/FB Ads/Email Invite** (Check: bio, venue, dates, room number etc.)
* **Email Compliance** (Mailer/FB Ads/Email Invite, Landing Page Link to review)
* **Approve with LeadJig/Acquire** (make sure any requested changes have been made)

**Week Before Workshop**

* **Workshop Folders:**
  + **Bio/Headshot**
  + **Business Card**
  + **Workshop Handout**
  + **Directions to Office**
  + **Company Brochure**
  + **1 or 2 Commissioned Reports** (Different than workshop topic)
  + **Feedback Sheet** (Printed on blue/green paper, add dates to the calendar and block out 50-60% of dates on the calendar)
  + **Additional SS Materials** (PIA Instructions, Life Expectancy Sheet, SS Brochure)
  + **Additional RIS-Adult Ed Materials** (Student Workbook, RIS Book for each attendee)
* **Workshop Materials:**
  + **Laptop/Charger**
  + **Notepads/Pens**
  + **Projector**
  + **Whiteboard/Big Paper Stand**
  + **Markers**
  + **Extension Cord/Surge Protector**
  + **HDMI Cables**
  + **Pointer/Clicker**
  + **Video Camera/Tripod/Cable**

**Day Before Workshop**

* **LeadJig Website:**
  + **Check who confirmed their attendance by email**
  + **Print a “Sign-In Sheet”** (Can export from LeadJig)
  + **Name Cards** (6”x4” index cards folded in half, with first name and last initial)
* **Call Prospects:**
  + **Use the “Workshop Confirmation Cheat Sheet”**
  + **Call Everyone that RSVP’d** (Including those that canceled)
  + **Make sure to acknowledge if they confirmed by email first**
* **BombBomb Video:**
  + Record and send **“Workshop Reminder”** to all prospects that signed up

**Day of Workshop**

* **What to Bring:**
  + **Workshop Folders** (see checklist above)
  + **Workshop Materials** (see checklist above)
  + **“Sign In” Sheet**
  + **Name Cards**
  + **Signs** (to guide prospects to the room)

**Day After Workshop**

* **LeadJig:**
  + Edit the campaign to assign the appropriate **“No Show”** email template
  + Run through the **“Sign In”** list to check off who attended and who did not
  + Hit the **Redtail Integration** for that campaign
* **Morning (8:30-10am) Appt. Setting Calls:** (don’t leave a message if they don’t pick up)
  + Call all prospects that checked off a tentative date/time
  + Call all prospects that didn’t choose a date/time or didn’t hand in the Feedback Sheet
  + Call all prospects that canceled or were no-shows
* **BombBomb Video:**
  + Record and send **“Sorry you missed…”** to all prospects that didn’t attend
  + Record and send **“Thanks for attending…”** to all prospects that attended, but not reached by phone to schedule appt
* **Metrics:**
  + Double check that the event type is labeled correctly
  + Edit the event in the metrics to add:
    - **“Total Responded”**
    - **“Total Attended”**
    - **“Total BU’s”**
  + Add the Appt. Date for each prospect you have confirmed by phone
* **CRM/Redtail:**
  + Check the prospects that scheduled appts are not in the CRM twice and only one account for the family
  + Add the Appt. Date for each prospect you have confirmed by phone
  + Tag /Associate them to the type of event they attended
* **Afternoon (4:30-6pm) Appt. Setting Calls:** (don’t leave a message if they don’t pick up)
  + Call all prospects that checked off a tentative date/time
  + Call all prospects that didn’t choose a date/time or didn’t hand in the Feedback Sheet
  + Call all prospects that canceled or were no-shows

**2 Days After Workshop**

* **Morning (8:30-10am) Appt. Setting Calls:** (3rd call, leave a message if they don’t pick up)
  + Call all prospects that checked off a tentative date/time
  + Call all prospects that didn’t choose a date/time or didn’t hand in the Feedback Sheet
  + Call all prospects that canceled or were no-shows

**3 Days After Workshop**

* **Morning (8:30-10am) Appt. Setting Email:** 
  + Use the **Workshop Appt Setting Email** template to send to anyone you

**5 Days After Workshop**

* **Morning (8:30-10am) Appt. Setting Calls:** (4th call, leave a 2nd message if they don’t pick up)
  + Call all prospects that you have LVM and sent email to but have not responded yet
* **LeadJig:**
  + Export your list of prospects that RSVP’d for that campaign
* **iContact:**
  + Upload the **LeadJig list** of prospects that RSVPed into the **Video Animation Funnel list**
* **BombBomb Video:**
  + Resend **“Thanks for attending…”** to all prospects that attended, but not reached by phone to schedule appt.