**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.