



September: Strategy & Prep

- ☐ Define event audience (prospects, referral partners, or both)
- ☐ Select event types and themes (e.g. Open House, Lunch & Learn)
- ☐ Assign roles and responsibilities for each event
- ☐ Add events to the CRM and community calendar
- ☐ Design and distribute invitations (email, flyers, social media)
- ☐ Segment and invite VIP prospects and professionals
- ☐ Order supplies and confirm space availability



October: Outreach & Logistics

- ☐ Call and email to confirm RSVPs
- ☐ Train front desk team, concierge, and staff for guest-readiness
- ☐ Prepare welcome materials: name tags, brochures, giveaways
- ☐ Conduct team role-play for event execution
- ☐ Confirm food, entertainment, or presenters
- ☐ Post weekly event reminders on social media



November & December: Event Execution

- ☐ Greet all guests warmly and collect contact information
- ☐ Assign team members to note-taking and follow-up tasks
- ☐ Offer tours during or after the event
- ☐ Send thank-you emails or cards within 48 hours
- ☐ Log interactions and next steps in CRM
- ☐ Share event photos with attendees and on social media



January: Measure Success & Follow Up

- ☐ Call all attendees to thank them and schedule a next action step
- ☐ Segment leads by readiness: hot, warm, cool
- ☐ Host lunch or re-engagement events for warm/cool leads
- ☐ Debrief with your team to discuss wins and improvements
- ☐ Report move-ins and ROI from event activity