

Event/Workshop Checklist

Done?	Initial	Due By	Responsibility	Notes
	Have brainstorming meeting to plan event		AA	Set date, location, subject matter, etc.
	Plan for wholesaler support		AA	
	Plan for location, date, time, menu		AA	
	Plan for staffing		AA	
	Complete Workshop Promotion Checklist		AA	

Done?	6 weeks	Due By		Notes
	Create/Update Seminar invitation and presentation		FFG	
	Forward to compliance for approval		FFG	
	Complete all necessary edits from compliance		FFG	
	Redtail: Create Seminar Management & Association Groups		FFG	

Done?	4 weeks	Due By		Notes
	Details of event communicated to all staff		FFG/AA	Review Tag Groups, Call Lists, and special circumstances
	Forward a copy of invitation to AA Office in preparation for RSVP calls		FFG	It is good for the rest of the staff to have copies of all event details as well
	Mail: (Mail Only) invitations and letters		FFG	The goal should be for the mailer to hit approx 2 weeks before the first event date
	Call: Phone/Mail process to specified groups		FFG/AA	Outgoing phone call to notify contacts of invitations being mailed

Done?	3 weeks	Due By		Notes
	Call: Continue Phone/Mail process		FFG/AA	Be sure entire list has been called, all activities complete and notes up to date

Done?	2 Weeks Prior	Due By		Notes
	Call: Continue Phone/Mail process		FFG/AA	Be sure entire list has been called, all activities complete and notes up to date
	Take names & phone numbers from incoming RSVP calls		AA	Always verify phone numbers & correct spelling of names. When speaking with attendees, let them know that we will be confirming their attendance the day before the seminar. Send activity to Redtail CO notifying them of the attendees
	Each morning check for messages on voicemail		AA	Call attendees who left messages on voicemail & let them know we received the message & they will be added to the attendee list. Send activity to Redtail CO notifying them of the attendees

Done?	Three Days Before	Due By	Notes
	If less than 15 attendees, notify Advisor		AA Ask if he wants to cancel the seminar.

Done?	Two Days Before	Due By	Notes
	Make sure packets have been completely/properly assembled		AA
	Determine who will be bringing kits & equipment to mtg. facility		AA
	Give head counts to meeting facility		AA
	Ensure all materials are ready to go to the event		AA

Done?	24 hours Before	Due By	Notes
	Call registered attendees to confirm attendance		FFG
	Redtail: Upload name tags and final attendee spreadsheet		FFG
	Print out 2 final versions of attendee spreadsheet		AA
	Check that all equipment pieces are collected & functional		AA Mic, speaker, projector, laptop, etc. if needed

Done?	After Event	Due By	Notes
	Details of event communicated to all staff		FFG/AA Determine who will be making follow up calls to set appointments
	Redtail: Upload attendee spreadsheet and questionnaires to Seminar Association		AA
	Call interested persons to schedule appointments		FFG OR AA
	Redtail: Send out "No Show/Thank You" letters to all contacts		FFG
	Redtail: Update all contacts with information from questionnaires		FFG
	Redtail: Tag all attendees with "Seminar Attended" keyword		FFG
	File a copy of the attendee list in the advertising compliance file		AA