

Events that Convert

Cheat Sheet

Working on a live event that will kick start your premium service offerings?

There are four areas where most business owners need help when they're planning their first live event, or an event where they are making a big upsell at the end.

SECTION 1: CONTENT

- ☐ Decide how many days your client event will be (2 - 5 is best)
- ☐ Brainstorm two modules that you will teach per day (plan for about 4 - 6 hours of content/facilitated discussion AT MOST each day, with about 1/3 of it being you teaching, 1/3 individual work, 1/3 group work or discussion)
- ☐ Outline your agenda, including breakfast, morning break, lunch, afternoon break, and other fun activities
- ☐ Make a list of 1-3 things that are NOT content-based that you want your attendees to experience
- ☐ Come up with ONE creative way to seat everyone at a meal to get them talking about things they may not have otherwise talked about

SECTION 2: PLANNING

- ☐ Search AirBnB for venues in locations that are 30 minutes from an airport (destination events only)
- ☐ Decide on dates for the event (shoulder season will help save money)
- ☐ Create a preliminary budget to account for venue, food, materials, audio visual, sleeping rooms, and fun activities.
- ☐ Set ticket prices so your regular ticket price margins reflect 50% above raw cost per person
- ☐ Research hiring a personal chef, or make a plan to order meals each day (or grocery shop prior to the event)
- ☐ Create your workbooks OR order swag bags about 1 month in advance

SECTION 3: RECRUITING

- ☐ Make a list of 5 people that you are friends with that would be perfect candidates for your event.
- ☐ Build a very basic landing page that shows the name of the event, the pitch, the dates, the pricing, some testimonials from former clients, and a way to purchase a ticket.
- ☐ Brainstorm your refund policy (there are good ones to view online)
- ☐ Draft a personal recruitment email offering the five people above a spot at a discounted rate, in exchange for promotional efforts
- ☐ Set up an opt-in page in a registration software or in Google Drive to find out all your attendees' arrival and departure times, dietary restrictions, noise preferences (early bird or night owl), and other things that may help you decide how you can make the experience outstanding for them.
- ☐ Give customers a deadline for when they need to purchase by (recommended launching 3-6 months in advance for planning purposes)

SECTION 4: COMMUNICATION

- ☐ Create a communication plan that touches attendees immediately when they've bought a ticket
- ☐ Draft your "two months out" email with a finalized agenda and things they should start thinking about
- ☐ Draft your "one month out" email with packing lists and "Things to Bring" lists
- ☐ Draft your "two weeks out" email with FAQs and weather projections
- ☐ Draft your "one week out" email one week out with last minute updates, and the week of with relevant contact information
- ☐ Draft your "post-event" survey in Typeform or Google Sheets
- ☐ Draft your post-event email with survey request

AT THE EVENT

- ☐ Ensure that you have someone on-site (admin or an assistant, or even someone who could only pay 50%) who can make sure that you're on schedule, who sets up all meals, and who runs errands in case of an emergency.
- ☐ Be sure you get 1:1 time with each person. Schedule it if you need to, and the best times could be at meals or during "free time."
- ☐ Take time to rest and recharge so that you are fully available to your attendees
- ☐ Practice your pitch at the end of the event so that you can feel confident helping people get to the next level.

POST EVENT CHECKLIST

So now that you've hosted some great people, let's make sure we follow up after the event.

- ☐ On the plane ride or ride home, check in with yourself and assess how you did. Write a journal entry that states how closely you stuck to your goals.
- ☐ Make a list (or pick out your favorite business cards) of one - two people that you met that you'd like to work with in a higher capacity
- ☐ Compose an email that states:
 - a. A personal greeting, or something that reflects a conversation you had
 - b. Why you're reaching out post-event
 - c. When you can schedule a time to chat about collaboration/client work
- ☐ Send the email. If they say no, be gracious and move on to the next person that you wanted to work with.
- ☐ Set a reminder in your calendar for one - three months after the event to follow up with everyone you hosted, even if they said no to collaboration/further work with you. Ask them about their goals and their progress.
- ☐ Take all of the notes/post-its/reminders that you have and place them in one location. Spend 30 minutes immediately after the event writing down what went right, what could have gone better, and what to do next time.