

EVENT PRE-PLANNING QUESTIONNAIRE	
LOGISTICS MAIN POINTS:	
Who is the best lead or manager for the event?	
What is the target date or week for this event? Pick a few target dates.	
What type of event would work best for this time of year?	
What is the best start time for the event for our clients?	
Verify there are no conflicting community events or holidays to consider.	
Is the facility available and not booked? Review before selecting target dates.	
What staff should be available for the first planning meeting?	
CRITICAL DATES TO SET:	DATE:
Event pre-planning meeting - 8 weeks pre-event.	
Logistics and graphics meeting - 7 weeks pre-event.	
Staff event overview and sales training - 6 weeks pre-event.	
Event marketing and phone/consultation skills meeting - 5 weeks pre-event.	
Final graphic and marketing meeting - 6 weeks pre-event.	
Start emailing clients and advertising in office and online - 4 weeks pre-event.	
Status meeting and RSVP check - 3 weeks pre-event.	
Status meeting and RSVP check, call campaign if needed - 2 weeks pre-event.	
Final status meeting: Checklist review, call campaign if needed - 1 week pre-event.	
Post event meeting: Statistics, feedback, set next event - 1 week post-event.	
STAFFING AND KEY DECISIONS TO MAKE AT THE MEETING:	WHO:
Marketing coordinator for the event?	
Who will do the graphic design to promote the event?	
What grand prizes can we choose from?	
Event name or slogan - Have 3 ideas to start the discussion.	
Event graphic design image - Describe the idea you would like to find.	
Can you get a vendor to help with costs?	
Will the doctor or sales consultant be good doing the event presentation?	
Who can create the powerpoint presentation for the event?	
Who will be in charge of the staffing for the event?	
Who would be best to handle the forms and organization for the front desk?	
Do you currently have an updated email list of patients?	
Who is in charge of keeping/getting the list current?	
Are you emailing clients now? If not, who will head this part of the process?	
Do you currently use pay-per-click advertising?	
Do you think you need new patients or leads to make the event work?	
Make sure the final decision maker is at the planning meetings!	