

Event Coordination – The RubySpeaks, Inc. Activity Series in ACT!

These initial Tasks are completed by our Director of Client Engagement (DCE)	
1.	Enter date of engagement, time, location, topics and fee in ACT!
2.	Make sure all contact information is complete including web site, email address and cell number.
3.	Add ID Status “Client + year”
4.	Create and send contract with Read receipt to client and copy the Communications Coordinator on the email. Use contract cover letter template which will give them instructions for downloading Ruby’s photo and pre program questionnaire. Encourage a faxed signed contract as soon as possible even though there may be a delay with the deposit check. CC the Communications Coordinator on the email
5.	Set date in ACT! to follow up for receipt of deposit and signed contract. Allow 3 weeks from the date the contract is written unless the engagement is coming up soon.
6.	Set Activity Series to Begin for Communications Coordinator.
7.	Change the Public Calendar in Outlook from a hold to confirmed engagement and send an invitation from Outlook to Ruby and the Communications Coordinator.
8.	Create new client folder, print contract and note date it was sent, file in Ruby’s office.
9.	Send request to webmaster to update schedule on web.
10.	Update both wall calendars upstairs and downstairs.
11.	Send introductory email (located in Pre Event Documents folder on X drive) which includes the following: <ul style="list-style-type: none"> ◆ An attachment that outlines specific due dates ◆ Reiterate instructions for downloading photo and pre program questionnaire ◆ Clarify next step will be setting up conference call ◆ For in-house training - Send client Invitation Examples PDF and Request a copy of their final invitation. ◆ For conferences, request brochures or newsletters about the conference. ◆ Offer Ruby’s Bio for advertising- customized for the particular group she is presenting for – Stadium Bio goes for Sports and Entertainment Venues
12.	Once the contract signed by the client is received at the office, have Ruby sign the contract and send it back to the client. Confirm with the client the preferred method for sending it back to them. Sending it by fax is quicker but verify with the client if it is ok to do so (they may not want others to see the investment details). Notify DCE that client signed the contract.
13.	If there is a specific date that handouts are due put it on Ruby’s Outlook calendar with a reminder set for 1 week prior.
These Tasks are completed by our Communication Coordinator (CC)	
7-14 days after contract is sent to client	
14.	Confirm receipt with the client of completed contract signed by Ruby and the client.
15.	Call or email client to confirm the deposit check arrived and tell them thank you. Remind client that balance of fee is due at the presentation.
30 days before the engagement– earlier if it is for a conference	
16.	Verify our receipt of Pre Program Questionnaire or send email reminder with PPQ attached if necessary.
17.	Request staff training invitation or conference flyer if we have not received it.
18.	Schedule Conference Call for Ruby with Client - Set an appointment for a telephone conversation between Ruby and the client.
19.	Print Conference Call Checklist and PPQ for Ruby to review prior to the Conference Call.
20.	Confirm client will have check for balance of fee ready for Ruby the day she speaks. Remind them they have a copy of that invoice in the contract.
21.	Get Ruby details so she can book flights– Ruby needs speaking dates and times, a note about special events to arrive early for (also add to her Outlook calendar as needed), speaking location and nearest airport to fly into with airport code.
22.	Reserve rental car and hotel if applicable once Ruby books flight. Rental car companies and hotels each have frequent customer numbers for Ruby. Ruby prefers two beds, near but not next to the elevator and requests a refrigerator in her room.

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7 days before the engagement	
23.	Courtesy Call – Read Conference Call notes first then confirm ground transportation (will client pick Ruby up, if so where? or rent car), verify receipt of handouts, and confirm understanding of AV needs and room set up.
24.	Confirm Hotel Reservations - confirm that they have Ruby’s frequent stay number for that hotel chain, confirm two beds and refrigerator in room.
25.	Prepare Event Packet - Give Ruby Contact Report (Reports>Other Contact Reports>RubySpeaks Contact Report) and Client Event Report with all necessary driving directions from MapQuest.com – from airport to hotel, hotel to speaking engagement, speaking engagement back to hotel or airport, hotel to airport.
26.	Prepare updated Invoice for Ruby to give client which includes all information available and copies of available receipts, leaving totals blank so Ruby can fill in once she has all the receipts. Fill in blanks in the Expenses Worksheet.
2 to 3 days after the engagement	
27.	Note what payments were received; bill the client for the balance and expenses if Ruby didn’t leave them an invoice, set reminder for follow up until payment is received.
28.	Document information from Evaluations – create Tally letter, and enter all checked boxes into KickStartCart (Our online database and Shopping Cart for online product sales and newsletter distribution.)
29.	Collect Post Event Report from Ruby and record notes in ACT! (Includes information about gift given, next step with client, highlights of program, expenses, what Ruby wore and score Ruby gave herself.)
30.	Use Script for Client Follow Up form after Event to call the client for feedback – then share the completed form with Ruby before filing the form in client folder.
31.	Set follow up tasks for referrals and next step with client in ACT for Director of Client Engagement and send follow up notification via email to DCE (include as much information as you can from the Evaluation and the Client Follow Up form.)
32.	Send Thank You letter with testimonial request, and tally using the Thank You Letter with Tally Report template – include some quotes to make it easier for client. Also include a sample of a Testimonial letter we like – Golden State Warriors and/or KOA (located in Post Event Docs folder).
10 days after the engagement or 7 days after the thank you letter has been sent	
33.	Call to remind client of Testimonial Letter Request if we have not received it – refer to the examples of Golden State Warriors and KOA we sent to them to make it easier for them.
34.	Add client name and one quote from evaluations to the Web Quote Table Template and submit to webmaster once there are 5 or more quotes.
35.	Pull quotations that Ruby notes from evaluations to add to testimonial quote compilations by Client Type and Topic.
14-21 days after the event	
36.	Confirm we received final payment and travel reimbursement. Call Client to confirm the payment arrived and tell them thank you.
37.	Scan testimonial letter, file in appropriate folders and send thank you to client for testimonial letter.

Specific Steps Ruby takes to prepare for each engagement	
1.	Review PPQ, research client and have notes and specific questions ready for conference call.
2.	Determine program material based on their specific needs and information gleaned from conference call.
3.	Customize PowerPoint with their pictures and logo.
4.	Customize Handouts, create Bonus Handouts and customize evaluations for all sessions.
5.	Send Handout, Bonus and Evaluation originals to client with read receipt in email.
6.	Create cheat sheet of keywords, titles of attendees, specific desired outcomes, PPT slide list and stories.
7.	Print custom introduction for introducer to read. (Make it large font and print on colored paper.)
8.	Identify props or activities and pack accordingly.