Group Presentation Checklist

EVENT LOGISTICS

- [ ] Decide on the topic/theme of your event
- [ ] Determine date
- [ ] Determine time
- [ ] Define your audience
- [ ] Define your ideal audience and where they are gathering.
- [ ] Are you targeting existing groups or creating your own?
- [ ] Target ages 55-80 within local zip codes
- [ ] Invite families previously served, those who haven't decided to buy and those with unfunded arrangements
- [ ] Find location – Be sure to research fully (click here for a comprehensive list of things to consider when finding a location)
- [ ] Will the space be conducive to delivering a presentation?
    - [ ] Is there room at the front so everyone can see your presentation?
    - [ ] Is there a screen available?
    - [ ] Is there interference from other areas? *(i.e. a restaurant setting where there is competing noise)*
    - [ ] Is it big enough to accommodate your audience?
    - [ ] Does it have Wi-Fi, if needed?
    - [ ] Is there space for a sign-in area?
    - [ ] Is there room enough to move around and talk with the attendees and schedule appointments?
- [ ] Who's responsible for taking charge, fielding questions and taking care of logistics? *(make sure this information is included in your invitation and flyer/poster, this will be used for RSVP purposes)*

MARKETING THE EVENT

- [ ] To market your event you can take advantage of several forms of advertising/promotion:
    - [ ] Create invitations – Send to your target group at least 2-3 weeks prior to the event
    - [ ] Flyer (8½" x 11") – Creates awareness of the event
    - [ ] Poster (18" x 24") – Creates awareness of the event and has room to list multiple events at once
- [ ] Mention the event on your website
- [ ] If possible, post the event details on TV monitors positioned throughout the funeral home
- [ ] Invite attendees using Facebook Boost
    - [ ] Create instructions – See current Group Presentations page on our portal: *https://revive.social/facebook-ads-vs-boosted-posts/*

DAY BEFORE EVENT

- [ ] RSVP/Attendee List – Everything you need to capture from attendees, complete with checkmark space for those who responded
- [ ] RSVP/Attendee List – Use this list as a way to track responses from attendees and track attendance the day of the event
- [ ] The day before – Call each of the respondents and confirm their attendance
- [ ] Encourage them to bring friends; remember to record guests on the RSVP list

DAY OF THE EVENT

- [ ] Print RSVP list and track attendees when they are signing in
- [ ] Gather all contact information from folks who are attending the event with a neighbor/relative/friend.
- [ ] Set up a table with brochures and pamphlets, such as: GA Simply Speaking, Financial Strength Brochure, Veterans, Reasons for Preplanning, etc.
- [ ] Set appointments with attendees during the event *(remember: if they are not contacted within 48 hrs. of the event, it stops being a priority in their mind and is harder to set the appointment later)*

FOLLOW UP

- [ ] Contact those who RSVP'd but didn't show
- [ ] Of those who attended but could not set an appointment, be sure to systematically follow up with these individuals by entering the names into your CRM system to keep in constant contact