



Step 1: Identify 3 Unique Experiences

Action

- Pull Client Intel Sheet from Salesforce
- Identify 3 potential options from the event idea list
- Identify 3 potential dates in the calendar that would be available to host the event

Event Ideas Need To Be

- 1 Fun! Something you'd want to do with your friends or colleagues
- 2 Something you can do as a group
- 3 Conducive to a short talk and being able to converse with guests
- 4 Based around the client hosts' interest

Event Ideas!

- Personal Stylist Party (dress your body type)
- Flower Arranging Class
- Cake/Cupcake Decorating
- Wine Tasting/Winery Tour
- Murder Mystery Dinner
- Beer Tasting (Brews & News)
- Happy Hour (Martinis & Money)
- Mani/Pedi (Tips & Toes)
- Quilt Shop Hop
- Cooking Class
- Golf Pro Tips/Top Golf
- Sporting Events
- Candy Shop (make fudge, waffle cones)
- Sushi Making
- Tennis Pro Clinic
- Food Truck Event
- Beer Brewing Basics
- Regional Wine Tasting
- Cheesemaking
- Ethnic Event (education on culture/food/etc.)
- Art Exhibit (Private Tour Guide)
- Intro to Pickleball
- Pottery Painting
- Wine & Painting Event
- Pedal Cab
- Wreath Making (holiday time)
- Candle Making
- Fragrance Making
- Bowling
- Escape Room
- Gardening Expert
- Behind-the-Scenes at the Zoo
- Penguin Experience at the Aquarium
- Progressive Dinner Bus

Step 2: Identify the Right Client Host

Objective

Choose one of our best clients whom we want to show we appreciate by hosting a customized event that fits their interests, with their people, on a date and time that is convenient for them.

Host (Andrea)

Quantitative & Qualitative Qualities

- “A” client for 3+ years
- She is our ideal client avatar and is able to invite ICAs
- She has referred to us in the past and is likely to refer again
- “Gets” how our business works, knows we need new clients to grow, and wants to see us succeed
- We enjoy spending time with her outside the office
- Has a circle of co-workers, friends, or clubs/groups to invite



Step 3: Craft the Invite Language

Objective

To make this about appreciating the client and NOT about building our business or getting referrals – keep it client-centered.

Action

- Tell the client how much we appreciate them
- Explain why we want to do this
- Give them 3 ideas of what we could do
- Articulate who we'd like them to bring without sounding salesy or cheesy

Andrea's Event

Tips & Toes (Mani/Pedi Night)

The space could be rented out for a private event.

Event allowed us enough time to get to know each of the clients' guests.

She could invite 9 friends and "treat" them to a mani/pedi.

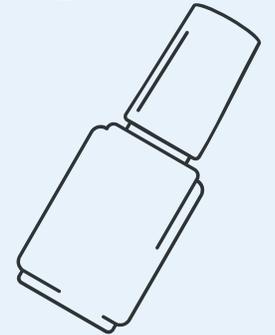
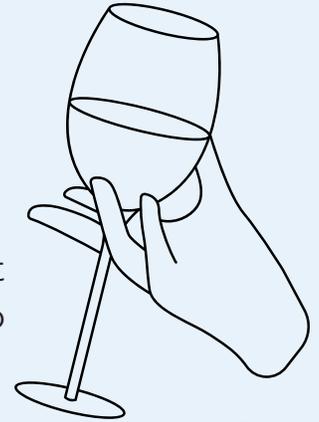


Script

“Andrea, I have absolutely loved working with you and Rick over the last several years... Your situation is the one that I feel like I was built for. I love working with high-income-earning women who are just crushing it in their careers and are also moms, and I have found that I really specifically like working with pharmaceutical sales reps like you. As you know, you’ve got a crazy benefits package that’s based on a tiny salary, where most of your compensation comes from this wacky bonus that you get, and I just think it’s so much fun and there’s so much work to do. So here is what I’m thinking...

I used to do these big client appreciation events where I picked the time, the day, the restaurant, the menu, the people you sat with, and the agenda. And while they were super fun, I didn’t feel like I was really showing appreciation to my clients in the way that I really wanted to. So instead, I’ve got this idea, and I was hoping you might help me with it. I would love to host an event for you and some of your girlfriends/work friends. We could do a *wine tasting, a mani-pedi night, or a flower-arranging class* — just something that would be enjoyable and relaxing for you and your girlfriends/work friends.

I’d love to host one of these for you, have you pick a date and time that works for you, and invite the people you want to spend time with. And you know me—I’m not very salesy, and I’m not going to make it weird. I’ll talk for like 10 or 15 minutes just about the planning I do for pharmaceutical sales reps and some tips and tricks for people who have these wacky benefits packages. I really want to bring awareness to some of the gaps and issues that these ladies might not even know exist, and I’ll talk a little shop so I can deduct the event! Otherwise, we’ll just hang out, get our nails painted, have some great wine, and I’ll have it catered. Does that sound like fun to you? Would you enjoy that more than sitting in a big ballroom with a bunch of other people?”



Step 4: Craft a Talk with a Hook

Objective

Prepare a VERY short talk that focuses on the client, highlights why we love working with them and incorporates a business hook.

Two Potential Formats

- 1 Short Format:** 15-minute talk at the beginning with stories, targeted language, and a reason to talk to you
- 2 This, then That:** Intermixing event and tips/points (i.e., taste a wine, then give a tax strategy, and repeat)

Andrea's Event (Short Formal Talk)

Shared my passion for high performance pharmaceutical sales reps and some of the gaps in their planning.

Went through a few issues I noticed with their benefits packages and gave some things for them to look at.

Asked a few questions I knew they didn't know the answer to.

Examples of a Hook

- A question I know they don't know the answer to
- Tax tips I know they haven't heard before
- An interesting story or example of how someone in that niche made a mistake that cost them big by working with the wrong planner

Step 5: Execute Client-Centered Follow-Up

Objective

These are our BEST clients and their closest family and friends. We are NOT going to follow up with them like we would a regular prospect. We are going to be low-key and overly cautious.

Dear [NAME],

It was such a pleasure to host you at our _____ event this past [MONTH]. Thank you for attending and we hope you found value in it!

As I am sure you'll appreciate, it's important for us to work with clients who are very serious about their financial planning. We've reached out to you several times in the last 6 months/12 months to no avail so we will stop following up with you at this time.

We would still love the opportunity to work with you, however our time is valuable, as is yours and we don't want to waste anyone's time or pester anyone! If you'd like to sit down with us to start working on your comprehensive analysis or to just see if we can help you maximize each dollar, please do not hesitate to contact us at XXX-XXX-XXXX.

Sincerely,
Libby Greiwe, FIC, ChFC, RICP

Follow-Up Process

3 days after the event

Send photos from the event along with an educational piece and answers to a few common questions that were asked.

10 days after the event

Call to invite them to a discovery call/coffee/etc. and answer any questions they may have.

1 month after the event

Send another follow-up email.

6 months after the event

Send my "Lost Cause" letter to everyone who didn't respond (snail mail).