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The 15 Keys to a Successful Event

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Key #1: The Scope and Design

Start with determining your overall goal. Is it to build your database and attract new prospects? Is it to make people aware of a new community being built? Is it to offer something of value for your warm and hot prospects? Is it to provide a community outreach program? Is it to generate and close more sales? Most times it will be a combination, but your primary goal will help determine the scope and design of the Lecture/Event and how much you want to invest in it.

Correlate your goal with your marketing budget. Below is a list of costs customarily associated with planning a successful marketing event:

- ✓ Design, print and mailing costs for invitations
- ✓ Age, income & zip code qualified list rental for mailing
- ✓ Food & food service related costs
- ✓ Printing/copying handouts
- ✓ Name Tags
- ✓ Attractive raffle prize
- ✓ Rental of A/V equipment (if necessary)
- ✓ Valet parking
- ✓ Speaker's fee (if using an outside speaker)
- ✓ Promotional items/favors

Take into consideration any space constraints. If you plan to include a meal or snacks, it is best for people to hear the lecture and eat in the same room if possible. If you plan to have them eat in another area, always provide the meal after the lecture. Whether you hope to attract 30 people or 130, you want to create a sense of fullness to the space you use.

Take into consideration your staffing capabilities. A stand-alone lecture will require less staff. A robust Lecture/Event will require participation from marketing staff, food service staff, residents and support/awareness of the entire community.

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Key #2: Setting the Time Line

Advance planning and proper preparation is the key to your success. Let's use April 1st as the hypothetical date you plan to have your marketing event to flesh out an example time line.

First calculate 7 days prior to the event for your RSVP deadline. This can be flexible, but people respond better to some kind of deadline. If your seating is limited for dining and you max out capacity, you can keep a wait list or add an overflow day.

Event: April 1st
RSVP Deadline: March 25th

Then calculate 2-3 weeks prior to the RSVP deadline for the time you want the invitations in the mailbox of your prospects.

Invitations in prospect mailbox: March 4th

Next calculate how long it will take the mail house or staff to get the invitations to the post office, PLUS the number of days you anticipate it will take the post office for delivery by March 4th. One week to ten days is a safe calculation depending on the size of your mailing and whether you plan to mail first class or pre-sorted bulk rate.

Invitations to mail house for processing and delivery to post office: February 23rd

Now determine how long it will take to design and print your invitations depending on whether you are creating in-house or working with an agency. Allow time for any internal approvals you need to go to print! Let's say we are using an agency and are allowing a month for design including revisions, approvals and printing.

Start invitation design January 23rd

Other tasks to add to your time line include:

Order promotional items, note pads, pens, favors etc. six weeks before the event
Head count to food service: typically 7-10 before the event
Handouts and presentation packets copied and ready: 3 days before the event
Name Tags prepared: no later than the day before the event
Sound & Technical checks: 1-2 hours prior to event

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Key #3: Event Overview

Below is an event overview. For this example let's assume it is an event for 40+ people:

- Guests have valet parking options whenever possible. Any necessary directional event signage is in place.
- Guests walk in the front door of your community and are greeted warmly by designated "Greeters" directing them to the registration table, coatroom and presentation room.
- Guests sign up for the raffle at the registration table (this is your opportunity to get any missing contact information and build your e-mail contact list).
- The room is set up with round tables of 8 (if dining in the same room) with one seat reserved at each table for a resident, staff or depositor "Host". Each place has a pen and small note pad or note card pre-set and guests sit wherever they like.
- The lecture is presented first, followed by questions (allow 1 hour total, 11:00 to Noon or 10:30 to 11:30).
- A light luncheon is served after the lecture while the "Hosts" and other guests engage in conversation about the lecture content and their personal situation. (Allow 1 hour, Noon to 1:00 or 11:30 to 12:30). Gather any further questions that have come up during lunch and share them with the group during dessert. The marketing director should meet and greet each guest during lunch.
- Comment cards or feedback sheets are handed out to all guests and left on the table to be collected at the end of the event.
- Tours are made available in and conducted by staff (Allow 1 hour for tours). Make every effort to conduct tours in small groups (2 to 4 people). If your community is an expansion or new development bring guests to the sales center instead!
- The staff person sitting at the registration table (usually the marketing support person) can provide handouts, set appointments for the sales staff and write down the names of people who take home floor plans.
- After all guests have departed, the sales team gathers to debrief about prospects, celebrate their successes and plan follow up. Be sure all feedback sheets, attendee and hot prospect information is entered into your lead management system no later than 1-2 days after the event and that everyone receives a follow up phone call within a week of the event.

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Key #4: Invitations

The key to a well attended event is the language you use in the invitations. In my experience, it is not necessary to produce an expensive invitation to get people to RSVP as long as it is looks polished and has a strong message. People have to read the invitation and understand that this Lecture/Event is NOT a sales pitch for your community, but rather an educational and informational presentation that will help them understand their options and empower them to become savvy consumers REGARDLESS of which community or option they ultimately decide to embrace.

So yes, you will have some people attend that cannot not afford your fees, or opt for your competition or perhaps just attend for the free food but most of your attendees will be more likely to want to learn about what you have to offer because you gave them this educational opportunity. They will be more responsive to your follow up phone calls and more likely to tell their friends about your community!

Here's a sample of invitation copy with a compelling message designed to generate a strong response!

You're invited to a free lunch and seminar! Please join us for:

***"Planning for Your Longevity:* A Formula for Success"**

If you're confused about the number of retirement living options available to you or a family member, you're not alone. Whether your plan is to remain in your home, move to a condo or join a retirement community, you'll glean valuable insights from ***Planning for Your Longevity…*** *finding it both informative and thought provoking.*

- ***Compare all the options and find the best fit for you or your loved one.***
- ***Understand the various financial options and contracts***
- ***Research and ask questions about senior living options***
- ***Make sense of the terminology used in the senior living industry***
- ***Please join us for lunch and this lively and informative talk!***

To register, call XXX-XXX- *Seating is limited, registration is* **XXXX by (date)***necessary.*
After lunch, stay for a tour!

Include: Day, Date, Time, Location, Map, Logo, Equal Housing Opportunity Logo

Key #5: Mailing Lists

Many communities already have an established list of age, income, and zip code qualified names that they rent or access for direct mail campaigns. Always start with your current database of active leads, then supplement with the lists to mail to as many contacts as your budget permits, that meet your target market criteria. Be sure to include status codes like: want to remain at home, not ready, do not call, mail only. These names may be converted after gathering the lecture information.

The ideal number of invitations will vary based on the size of your market, the amount of competition your area and the number of attendees the room can hold. Offering multiple dates for the event gives you “more bang for your buck” on the printing and mailing costs. Many communities prefer to limit attendees to about 40 so the size is manageable for the staff. Others fill a large room with over 100 and emphasize personal tours at another time. So ultimately your sales goals, your budget, the number of names on your purchased list and the room size dictate the volume of your mailing.

The cost is worth it! These people will show up at your community, tour it, receive information, meet your staff AND hear a presentation that will cause them to want to learn more about what you have to offer! They will be more likely to set a personal appointment than they would without attending an event. You will have established a common language so you can quickly cut to the chase about their interest, qualifications and motivations for your product. This keeps your database cleaner and your pended activities more quality driven.

Educational events can serve as a great “closing” activity for people “sitting on the fence” about taking action. So don’t be frustrated if you have repeat attendees or people attending that are existing leads!

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Key #6: Menu & Food Services

It is important that you consult with your dining services staff at your community before you confirm the date and time of your event. Assuring your plans work into the food service department's commitment to other department activities and servicing the residents will be paramount to your success!

When planning the menu remember to KEEP IT SIMPLE! Wow your guests with service, quality and presentation rather than complex gourmet delights. Choose lighter fare like soup, an entree salad and dessert. This is especially true if you plan to eat before the lecture, which is sometimes necessary (I recommend eating after the presentation to maximize success).

It is best to have a simple, plated lunch that can be immediately placed in front of attendees at the end of the presentation. Allow guests to stretch their legs, use the restrooms, start to eat and talk with others at their table. This gives people the opportunity to discuss their personal situation, listen to others and generate questions. After they've had food, the Q&A session will be more robust. Start Q&A as they begin eating dessert. You'll be amazed how many more questions will be asked which will reinforce that people need to set a personal appointment.

Put as many items as possible on the tables for easier and faster service; carafes of water and ice, pots of coffee, cream, sugar, bread and butter, and serve a very simple dessert like cookies, brownies or your community's signature dessert that can be put on a plate and placed on the table for guests to pass and share family style.

Try to minimize the need for guests to get up and carry food. If you are serving buffet style have food service staff help serve the food, making the line move faster. Dismiss by table to go to the buffet line so you avoid people standing in a long line. Watch for guests that need assistance carrying their plates. Avoid the need to go back again to get their beverage or dessert.

An alternative food service option is to offer a continental breakfast at a morning event, dessert and coffee at a mid-afternoon event, or wine and cheese at an evening event. This can be set up buffet style where attendees help themselves before the lecture begins. It will generate less connectivity between attendees and a less robust Q&A session, however, it is sometimes a better fit for the budget.

You'll need to confirm the following with your dining services team: menu, beverages, linens, center pieces (if you want them), number of serving staff needed, design of room set up, timing for set up, service and clean up.

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Key #7: Room Set-Up

If you need to maximize your space, traditional auditorium style seating is fine, but it is limiting to conversation and interaction among attendees. To maximize your impact, set up the room with round tables of 8 and whenever possible keep the meal service in the same room as the presentation. People will simply move their chair around so they can see the presenter. These round tables promote the best conversations and the opportunity for “Hosts” to interact with prospects.

If you are doing a buffet luncheon, smaller stations in various parts of the room help reduce long lines. If you are using a long buffet, have the line go down both sides to speed it up.

Put extra seating on the side for late-comers, walk-ins, and staff. Remove some of the chairs from a table that has easy access to the doorway for those attendees that have walkers or wheelchairs. Try to guide people that appear frail or use assistive devices to that table and the more able-bodied further into the room.

When setting the tables, include a brochure, note pad and pen at each place. This is a great way to get your premiums distributed to prospects and it gives them something to jot down notes or questions they may want to ask at the end of the presentation. If you plan to use handouts or favors pre-set all these items.

Have a table(s) set up so attendees walk-in, are greeted by staff or residents, then register and pick up their name tags. Have the registration table as close to the front entrance as possible. Avoid any confusion about how to get to a certain room location for an event. Use hosts to greet, direct to the event room, direct elevator traffic or escort as necessary. Guests should never be left wondering where to go or how to get there.

Remember that you may need coat racks during cold or inclement weather. Make sure they are easy and accessible for attendees.

Always have the A/V equipment set up and tested prior to the arrival of attendees. Know who to call and how to reach the A/V expert in case of challenges with equipment during the presentation!

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Key #8: Resident Hosts & Staff Support

If you are having a meal before or after the presentation, adding resident hosts or staff can really improve your overall results. There is no marketing tool more powerful than the residents…as long as you use the right ones! Look for residents with warm, friendly personalities. Choose people that are pleased with their lifestyle and take pride in sharing information about what life is really like in your community.

At each table of eight, put a tent card that says “**This Seat Reserved for Resident or Staff Host”**. Fill in the rest of the table with attendees. Eating after the lecture gives people time to share their thoughts about what they learned and for resident and staff hosts to share their experiences about community and answer questions. A well trained Resident Host will report back to the marketing team any important insights or information gathered during the conversation at their assigned table. Starting a formal Q&A session as people start dessert and coffee gives sales staff the opportunity to capture more energy and questions from attendees.

When recruiting for hosts, do so by making a personal phone call or visit. Explain the importance of their role and share something about the qualities or personality of the resident that was the reason you asked them to be part of your team. Always give people the option. Sometimes you think a resident is perfect for this role, only to find out the resident really does not want to participate. Most will be flattered to be asked and proud to represent the community. Occasionally you may get negative feedback about a host, if it is valid, chalk it up to experience and simply do not invite that person again to help.

Communication and confirmation is the key to success with residents! After speaking on the phone or in person with a potential resident host, inviting them to participate and they accept; send a written notice to all of the Hosts repeating the details. Older adults need visual and verbal reminders! Always give them an out with a number to call if something changes at the last minute and they are unable to participate.

Also book a prep session for the hosts and any resident that will be showing their apartment home. This brief meeting will only take about 30 minutes. It is best to hold it no more than 2-3 days prior to the event. If a resident can help at the event, but not attend the Prep Session, simply cover the details with the resident one-on-one.

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Key #9: Organizing Community Tours

If you have a wide variety of floor plans, try to showcase the apartment styles you want to sell. Depending on the size of your community 2-4 homes on tour is a good number. If you have a model unit, include that in your mix. If you've had the same model for a while, it is good to mix it up with resident homes that will show well.

Show only resident apartments and model apartments that will leave a positive impression in the eye of the prospect. Too much furniture, too much clutter, furniture that is too large…all this will make the home look smaller and uninviting. Color, light, furnishings to scale, minimal clutter and knickknacks, friendly hosts, relatable décor, soft music, fresh scents in the home…this is what you want your guests to experience. Prospects should walk in and be able to imagine them living in that space or relating to what they see.

When possible, group the homes open for tour in close proximity to reduce the amount of walking for prospects. Take into consideration the route that tours will take to see the homes. Also include a representation of various sizes…one bedroom, three-bedroom, cottage, townhouse, studio, etc. People will often tour only the style or size that is of interest to them and avoid the rest. Others will tour everything out of curiosity.

Remember it is seed planting…the attendees will talk about their experience and what they saw in your community to friends, family, neighbors, strangers…you never know where this information will land. Word of mouth is your best form of advertising!

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Key #10: R.S.V.P. Protocol

Always put an RSVP deadline on your invitations and the words “Seating is Limited”. It will prompt people to respond in a timely fashion. Even after the RSVP deadline, you will likely receive more phone calls.

If you have your database system open when a phone call comes in, always look up the name to see if it is an existing lead or a new lead. If you are on the fly and can’t look up the name, always take the name, address, and phone number of every response. This way you can confirm your database information is correct or enter the new lead into to your system. When possible have the marketing assistant transfer the call to the appropriate sales person if they are available. You want to maximize the opportunity to find out a little bit more about the prospect if possible and make a connection.

Always confirm if they are attending alone or with another person(s). Ask for the name, correct spelling and any information you can get about the people attending with the responding prospect. These are potential new leads! If you tell them you’ll have a registration list and name tags there is seldom any hesitancy in providing you with this information. The key is keeping your voice intonation warm, friendly, welcoming and delighted that they will be attending. Confirm they have correct directions. Ask them to please call if they are unable to attend at the last minute so someone else can be added from the waiting list. End the conversation with positive enthusiasm, “we’ll look forward to seeing you on Tuesday, I know you’ll really enjoy the presentation!” Another great tip is to say, “We typically confirm attendance via e-mail, do you have an e-mail address so we can contact you?” People are hesitant to give out their e-mail address, but are accustomed to confirmation information via e-mail. If they have an e-mail address they will typically provide it willingly. If they do not, you can enter that in your database system for future reference.

Anyone in the marketing office can take reservations, but have a dedicated person to handle the master list. Keep this information on a spreadsheet that can be alphabetized into a master registration list. All RSVPs should be entered into your database! You want to track who owns which lead, and which attendees are new leads for the community. If you use you are using your database correctly you can eliminate the need for the spreadsheet!

A simple way to code your leads on the day of the event is with a colored border around the stick-on name tags or a colored dot in the lower corner. Everyone is cordial to all guests but if you can identify your leads it is easy to make an extra effort to connect with those folks, keep quick notes on those conversations and set expectation for future follow up with them whenever possible.

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Key #11: Pre-Event Sales Techniques

Once you have your event on your marketing calendar, use it with all your prospect conversations. Marketing reps constantly hear the infamous words, ***"I don't know, I'm just not ready yet."*** Rather than get stuck trying to sell someone out of that mind set (which is of course what every other marketing rep at every other community is trying to do), offer understanding of their current position AND an opportunity to take the best first step in the research process…**become an educated and savvy consumer.** Tell them about the upcoming lecture/event, and what it offers in an educational, informational format regardless of when or where they may decide to make a move.

It's like the Tai Chi of selling to seniors. Move out of the way of their resistance and give them the tools, space and support to start down the path of self-persuasion. Pend follow up calls to see if they received your invitation mailing and offer to reserve a seat for them. You'll be amazed at how fast the word will spread about this lecture/event at your community once you've done it a few times. It will develop a reputation; people will tell you they've heard about it and want to attend the next one.

The key is to always have this offering in your back pocket as a point of conversation with prospects. People who aren't ready or willing to stop in for a personal meeting, will often agree that it is important to learn about all the options. You'll lower their resistance, and get a much clearer understanding of their status. If a person resists the concept of learning about this topic in a general, unbiased way; their status is a lot cooler that if the prospect agrees that it is a good idea just to learn. The low hanging fruit is easy to pick. It is reaching farther up the tree that takes true sales technique and creativity.

List the event on your website calendar, and do a short article about it in your prospect newsletter if you have one. It is also easy to put a short blurb in the local newspaper Community Calendar section, typically free of charge.

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Key #12: Name Tags

In my experience, the one big mistake that most communities make is the font size. Our prospects have older eyes and if they sit across the table from someone and can read the first name on their name tag they are more likely to engage in conversation than to confess they don't remember the person's name and can't read the name tag. To make it easy for everyone, use the largest font size possible based on the size of your name tags. If you are using a standard, self-stick type usually 36 - 48 point font will work. Put the first name on one line and the last name of the second line. If necessary, make the first name larger than the last name.

The larger size also helps the speaker. It is much more powerful for a speaker to call on a person who has a question and be able to address them by name. You, the tour guides and other support staff will find it much easier to remember people and use their names all during the event when the name tag font is large.

Proofread your name tags to make sure they are spelled correctly and you have name tags for all attendees on your list. Keep extra blank name tags and a permanent marker on hand in case of walk-ins or names that were spelled incorrectly in your database. Make sure you go back to your database after the event and update any names that were incorrect so it never happens again.

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Key #13: Welcome & Introductions

Always test the A/V equipment before your guests arrive to be sure the sound levels are correct and everything is working properly. Decide in advance the light levels you need in the room when using the screen and projector. Close curtains if necessary, especially if the audience is facing the windows.

When possible have someone other than the speaker welcome the audience to your community and introduce the marketing team. Have a marketing team stand in front of the room where people can easily see them. This is an excellent opportunity for prospects to connect a name and face. This may be the first time for some attendees to actually meet the person that has been conversing with them on the phone. Take this time to point out where the restrooms are located and set the expectation for their time at your community.

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Key #14: Handouts and Raffle

People still feel best when they can look at a handout during the presentation. I've worked with the school of thought that claims it is best to handout materials AFTER the presentation, but find older adults especially do best having the visual materials in hand from the beginning.

Setting a note pad and pen with your community's name/logo/phone/website on it at each place give attendees something to jot notes on and take home with them as well. You can also put comment cards, small brochures, or event survey sheets on the table. I do NOT recommend setting out an entire collateral packet at each place. Keep them for personal appointments or for people at ask for a packet after the presentation.

The handout is a document that will have shelf life and usually is filed for future reference if a prospect is not in an immediate decision making mode. Be sure to have the date of the presentation, and your community's contact information on the front cover.

Another great way to gather prospect information is to have a raffle. Have a small paper form with lines for the name, address, telephone and e-mail address. People can fill this out when they arrive, though it will slow down your registration time or put the raffle sign-up at each place and walk around collecting them before the presentation begins.

Raffle prizes should be attractive to encourage participation. They can include something like a "Free Dinner for Two" at your community (take advantage of the opportunity to get the winner back into your community!), or a "$25.00 Gift Certificate" for something that relates to your community...drinks in the pub, the gift shop, etc. All raffle items should be presented in a way that is eye catching and looks substantial. It can also assemble a basket of goodies with premium items or include books that are related to downsizing, successful aging or making the decision to move. Put the names in a hat or basket, have the speaker or an attendee draw out a raffle ticket and read the name of the winner at the end of your Q&A and lunch, but before you dismiss attendees to tour the community.

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Key #15: Post Event Tracking & Follow Up

Make it a team goal to have all the data from your event compiled by the end of the day following your event. Each marketing rep needs a list of who attended and any notes or information that were gathered about that prospect. Enter all this information into your database system and schedule a follow up call.

It is wise to create a very simple evaluation form for attendees to fill out before leaving. Leave space for them to write comments and a box to check if they'd like to be contacted. Add this data to your notes and anyone that asks to be contacted goes to the top of your priority activity. From the evaluation forms you'll also find ways to make improvements the next time you offer the Lecture/Event.

If a full collateral packet was given to an attendee, it should also be noted on the registration master list. You can even go so far as to note which floor plans were requested by attendees after they toured. All this valuable information makes for a stronger follow up phone call and moves the sales process along.

Because you have extended this educational opportunity and your hospitality to the attendees, they will be most receptive to your follow up phone call. Your first goal is to find the hottest of the prospects that attended and set appointments. Your second goal is to have a meaningful follow up conversation and schedule further action with each prospect based on their feedback.

Once they have experienced the Lecture/Event and your hospitality, they will be more willing to continue future conversations with you. You have also established a common language and point of reference to continue closing them each step of the way in the sales process. Your pay off is in the follow up phone calls and appointments, so take this part of the process very seriously! Even if you know someone is “not ready” or not planning to make a move for another year or so, a follow up phone call to see if they have any further questions as a result of the lecture needs to be done. With each conversation you continue to develop rapport and trust with your prospect.

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