



EVENT PLANNER

Name of event: _____

Date/Time of event: _____

Location: _____

Contact person/number: _____

PURPOSE/GOAL:

PURPOSE:

- _____ Awareness
- _____ Education
- _____ Socialization
- _____ Create Trust/Rapport
- _____ Generate New Leads
- _____ Generate Referrals
- _____ Create Urgency

GOAL:

of invitations: _____

Response Rate/# Attending: _____

of New Leads: _____

of Referrals: _____

of Sales: _____

Approximate costs: _____



PROCESS-EVENT PLAN:

THEME/TOPIC:

PROMOTION:

- Invitation
- Advertisement
- Snipe Ad
- Press Release
- Flyers
- Electronic Media
- Calendar Notice

EVENT:

- Food/Menu
- Room set-up/Seating
- Audio Visual
- Parking
- Entertainment

RESPONSIBLE PARTY	DATE COMPLETED	COST

SUPPLIES:

ADDITIONAL STAFFING:

FOLLOW UP:



PAYOFF:

of New Leads: _____

of Referrals: _____

of Sales: _____

Total cost of event: _____

PROCESS IMPROVEMENT:

SUCCESSSES:

+ _____

+ _____

+ _____

+ _____

+ _____

OPPORTUNITIES FOR IMPROVEMENT:

- _____

- _____

- _____

- _____

- _____