How to Handle Client Events

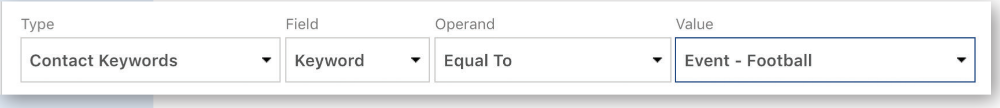
TOOLS:

- SEMINARS
- ADVANCED SEARCH
- EMAIL TEMPLATES
- BROADCAST EMAIL
- PDF REPORTS
- KEYWORDS

Observation: Advisors are more than just financial advice; they are an all-inclusive financial experience to their clients. Part of that experience includes providing world-class events for your exclusive clientele. Redtail CRM tracks events from start to finish, keeping all information about leads, prospects, and clients in one central hub.

Directions:

1. Create a Seminar with all the details of the event. (Date, Time, Description, etc.)
   SEMINARS > NEW SEMINAR
2. Create the attendee list for everyone that is going to be invited.
   ADVANCED SEARCH (SET CRITERIA) > SELECT ALL CONTACTS > CONTACT OPTIONS > BULK ACTIONS > ADD TO SEMINAR
3. Create an event invitation Email Template.
   MANAGE YOUR ACCOUNT > EMAIL TEMPLATES > NEW
4. Send the invitation to all invited contacts.
   SEMINAR > ACTION ICON > SEND TO SEARCH > CONTACT OPTIONS > BULK ACTIONS > BROADCAST EMAIL
5. Update Seminar Attendee Statuses as the contacts respond with their RSVPs.
   SEMINAR > ACTION ICON > MANAGE ATTENDEES > SELECT CHECKBOXES > ATTENDEE OPTIONS > UPDATE STATUSES
6. Add Guests to attendees.
   SEMINAR > ACTION ICON > MANAGE ATTENDEES > ACTION ICON > GUEST LIST
7. Print a Sign-in Sheet or Check-in List to track attendance while at your event or post event.
   SEMINARS > ACTION ICON > REPORTS > SIGN IN SHEET > SIGN IN SHEET / CHECK IN LIST
8. Create a Keyword with the Seminar name and add it to the contact records.
   MANAGE YOUR ACCOUNT > MANAGE DATABASE LISTS > KEYWORDS > ADD
9. Add the event Keyword to the contacts that attended.
   SEMINARS > ACTION ICON > MANAGE ATTENDEES > ATTENDEE STATUS (FILTER TO THOSE THAT ATTENDED) > SEARCH > CONTACT OPTIONS > BULK ACTIONS > ASSIGN KEYWORD
10. Send a post-event “Thank You” email to all contacts that attended, or an event summary to those that did not attend.
    ADVANCED SEARCH > KEYWORD = *EVENT NAME > CONTACT OPTIONS > BULK ACTIONS > BROADCAST EMAIL



Result: Relationships! Events are perfect opportunities to deepen existing relationships while expanding your network with guests that accompany your attendees. For best practice, Redtail recommends automating a part of this process by using automatons and workflows like the ones included here.

Helpdesk Link: http://bit.ly/howtoRTU

MORE >>
REDTAIL HOW-TO GUIDE 5

Client Event Automation

TRIGGER EVENT:
- Activity Added

AUTOMATION ACTION:
- Action Type: **Link Workflow from Template**
- Action Item: **Client Event Workflow**

IF ALL CONDITIONS TRUE:
- Activity Type ⟶ Equal to: ⟶ **Client Event**

Client Event Workflow

***Recommended to use with Automations**
Target date = Date of event

STEPS	TASKS	OUTCOMES
1	**PREP** *(6 Weeks before target date)* • Create guest list • Book venue	• Completed >> Send Invites & Confirm Vendors • Seminar Cancelled **>> COMPLETE WORKFLOW**
2	**SEND INVITES & CONFIRM VENDORS** *(4 Weeks before target date)* • Generate and send invites • Book vendors • Order event giveaways	• Completed >> Event Check-Ins • Seminar Cancelled **>> COMPLETE WORKFLOW**
3	**EVENT CHECK-INs** *(2 Weeks before target date)* • Send invite follow-ups • Check-in with vendors	• Completed >> Finalize Event
4	**FINALIZE EVENT** *(1 Week before target date)* • Print name tags • Print 'Seminar Attendee Report' • Finalize presentation • Pre-event team meeting • Confirm final RSVPs	• Completed >> Day of Event
5	**DAY OF EVENT** *(On target date)* • Set up venue • Add last minute RSVP changes	• Completed >> Follow Up
6	**FOLLOW UP** *(1 Week after target date)* • Edit presentation post event • Send follow-up	• Completed **>> COMPLETE WORKFLOW**

**All of Redtail's best practice recommendations in these "How to Handle" documents are intended to provide a starting point for each office or database to develop their own processes from. These are not intended to comprehensively represent industry standards or compliance requirements. Terminology used in the examples may vary depending on the Database Lists, Templates, and other personalizations unique to each database.*