

# Local marketing event planning guide

Hosting an event such as a Member Guest Day or informational breakfast can be a great way to engage member candidates and provide them with a taste of the Vistage experience. This document is designed to help guide you through the planning process.

## 1. Review your plans with your RE and establish a budget.

## 2. Do you expect more than 75 attendees?

No

Yes

Below are best practices and resources to help you plan your event. Support is available for many of the marketing deliverables, as requested through the local marketing support request form. Complete the form at least eight weeks prior to your event, once you determine the logistical details. This is an example of an ideal timeline, but sometimes circumstances may require the timeline to shift somewhat.

[Click here](#) for a printable checklist.

Complete the [local marketing support request form](#) to request support from the events team. Requests are subject to approval based on team bandwidth and availability. Support tactics could include:

- Event strategy and logistics
- Date of event
- Venue contracting
- Speaker(s)
- Agenda
- Sponsorship support
- Flyer/save the date
- Email campaign
- Landing page/registration
- Registration tracking assistance
- Signage
- Registration materials
- Shipping of event supplies
- Post-event attendance reconciliation
- Post-event debrief
- Post-event survey

9-12  
weeks out

### Date/time selection

The best days are Tuesdays, Wednesdays and Thursdays. Consider religious or local holidays.

### Venue/AV

Select a convenient location with ample parking that is reflective of the Vistage brand. Consider members' office spaces. Include AV in your budget. Consult with your speaker for their AV needs.

### Food & beverage

Consider time of day and length of the event. Your venue may provide recommendations.

### Speaker(s)

View [tips and best practices for booking](#) and a [contract template](#). Chair is responsible for booking the speaker and associated cost.

### Build pipeline

Use [prospecting best practices](#) to build your network and pipeline of member candidates.

7  
weeks out

### Landing page creation

Include the request in your LMS request form (submitted at 8 weeks, fulfilled at 7 weeks). [View a sample landing page](#).

### Lead list

If you are requesting any new leads, include the request in your LMS request form (submitted at 8 weeks, fulfilled at 7 weeks, if approved).

6  
weeks out

### Develop agenda

Be sure to leave time for on-site registration, breaks, refreshment needs and Q&A.

5  
weeks out

### Direct mail

If interested, include the request in your LMS request form (submitted at 8 weeks, fulfilled at 5 weeks). Chair is responsible for cost.

4  
weeks out

### Email campaign

To send emails to your leads, include the request in your LMS request form (submitted at 8 weeks, fulfilled starting at 4 weeks).

2  
weeks out

### Event box

Includes materials such as pens, folders, decision forms, personal action summaries, etc. Request in your LMS request form (submitted at 8 weeks, fulfilled at 2 weeks), or order on the [Order supplies page](#). Sponsor deadline for inclusion in event material (if applicable).

1  
week out

### Name tags

Request in your LMS request form (submitted at 8 weeks, fulfilled at 1 week), alternatively a [template](#) is available for you to create your own.



## Weekly

### Monitor event report for RSVPs

Check your event report at least weekly to monitor RSVP progress as you nurture your leads. [Click here](#) for a tutorial.

[Click here](#) to review five tips for prospecting.

If you have any questions, please contact [courtney.prato@vistage.com](mailto:courtney.prato@vistage.com) for more information.