

# Local marketing event planning guide

Hosting an event can be an effective way to engage member candidates. Give your member candidates the chance to see for themselves the Vistage meeting experience, by planning a local marketing event or Member Guest Day. This document is designed to help guide you through the planning process.

**Please discuss your marketing plans with your Regional Executive and establish a budget before beginning planning details below.** Marketing support availability is dependent upon Regional Executive approval, budget, and resource availability. Consider collaborating with other Chairs in your market to expand the reach of your event and pool your resources.

Below are best practices and resources to help you plan your event. This shows an example of an ideal timeline, but circumstances may require the timeline to shift somewhat. [Click here](#) for a printable weekly checklist.

9-12  
weeks  
out

**Date/time selection**

The best days are Tuesdays, Wednesdays, and Thursdays. Consider religious or local holidays, as well as upcoming Vistage events, to avoid and plan around.

**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 and 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](#) such as [LinkedIn](#), and attending local networking events in the coming weeks, to build your network and pipeline of member candidates. Also, reach out for referrals from your members. Discuss your event in group meetings and do the one-name exercise or [ideal group exercise](#) to get members thinking about who they may want to invite, and who you should be prospecting for. [See here for tips on building a referral culture within your group](#).

8  
weeks  
out

**Advertising—media buy and creative**

Research, negotiate, and pay for advertising, if desired. See [print ad templates](#) in Brand Central.

**Event flyer**

Download a template from [Brand Central](#), customize with your event details, and save as a PDF. Share with your network, members, and pipeline of member candidates via email, LinkedIn messages and posts, group meetings, networking opportunities, etc.

**Review your reserve list and lead list**

Be sure to review your current reserve list and update as necessary. If you are requesting any new leads, request through your RE. (Please note: if a new lead list is available and approved, it may take 2 weeks to be fulfilled.)

**Landing page creation**

If you would like a registration landing page created for your event, request through your RE. [View a sample landing page](#). (Please note: if approved, landing page requests take on average 1 week to be fulfilled.)

7-6  
weeks  
out

**Engage current members**

Engage current members for attendance and recruiting as applicable. Share your event flyer and RSVP info so they can share with their network and invite prospective members. If you would like member ambassadors at your event, select them and help them prepare for their role in the event.

**Develop agenda and logistics for event**

Be sure to leave time for onsite registration, breaks, refreshment needs, and Q&A. View a [sample agenda](#) here and a [logistics template](#) here.

5  
weeks  
out

**Marketing touch campaigns**

Begin an [email campaign](#) to your leads with a [weekly touch](#) to invite them to your event. Follow up with [LinkedIn connection requests](#) and [phone calls](#) to your leads, syncopated between the emails. Also, [post reminders about the event to your LinkedIn](#) and other social media networks. See a [sample marketing calendar](#) for scheduling outreach to your leads and network.

2-3  
weeks  
out

**Order supplies**

Order supplies such as pens, folders, posters, tape, name tag inserts and holders, decision forms, personal action summaries, etc. on the [Order Supplies](#) page.

1  
week  
out

**Print name tags and table tents**

Create and print name tags and table tents for your RSVP'd guests, utilizing the [templates](#) available on Brand Central.

**Confirm and finalize**

Confirm RSVPs and collect all final materials and supplies needed before your event. Finalize and confirm all details and logistics.



**Weekly**

**Monitor your RSVPs**

Keep track of the responses to your nurtures and event invites, and follow up (both with those who have responded and those who have not). If you had a landing page created, monitor RSVP progress through your [event report](#).

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