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# Event Best Practices Checklist and Phone Call Scripts

## Event Best Practices Checklist

Timeline	Activity	Completed
Five Weeks Prior to Event	Confirm the <b>Event Date</b> and <b>Secure Venue</b> .	<input type="checkbox"/>
Receipt of Registration	Make the <b>Registration Confirmation Call</b> within 15-20 minutes of receiving the registration.	<input type="checkbox"/>
Same or Next Business Day as Receipt of Registration	Mail the <b>Registration Packet</b> : company-branded envelope, cover letter, workshop directions, name badge and lanyard, workshop literature, and business card.	<input type="checkbox"/>
One to Two Days Prior to Event	Make the <b>Registration Reminder Call</b> .	<input type="checkbox"/>
Event Check-in	Provide prospects with the <b>Workshop Welcome Packet</b> upon check-in: company-branded folder, team sheet, note sheet, workshop response form, and writing instrument.	<input type="checkbox"/>
First Appointment Booking	At the time the prospect books an appointment, provide them with the <b>Strategy Session Packet</b> : appointment card, strategy session cover letter, office directions, and financial questionnaire.	<input type="checkbox"/>



## Phone Call Scripts

### REGISTRATION CONFIRMATION CALL SCRIPT

Hello Mr. Jones, this is Caroline Jensen. I am the office manager at Compass Retirement Allies. **I am calling to thank you for your registration** for The Truth About Annuities dinner workshop at Piattino's Italian Restaurant in Summit, New Jersey, with John Smith, the instructor.

**John is excited to be teaching on this topic. I would like to verify your contact information.**

Is the correct spelling of your last name J-O-N-E-S? **[ANSWER: Yes]** Wonderful, and your current address is 159 Hobart Avenue in Summit, New Jersey, zip code 07901? **[Yes]** Thank you. And lastly, your email address is jim.jones@gmail.com. **[ANSWER: Yes]** Perfect.

The other reason I am calling is to inform you that **in a few days you will receive a package from our office** – this package is important as it includes **your workshop access badges, event directions, and literature** about the event. Should you have any questions, or if I may be of further assistance, please don't hesitate to call our office at 800-866-8666. We look forward to seeing you there.

### REGISTRATION REMINDER CALL SCRIPT

Hello Mr. Jones, this is Caroline Jensen, the office manager at Compass Retirement Allies. I am calling as a friendly reminder about your registration for The Truth About Annuities dinner workshop on Wednesday evening at 6:00 pm at Piattino's Italian Restaurant in Summit. Also, did you receive the workshop packet from our office?

**[ANSWER: Yes]** That's wonderful to hear. Please be sure to bring your name badge as this is your ticket into the class – and of course, don't forget the directions sheet that was included as well. If I can be of further assistance, please don't hesitate to reach out. We look forward to seeing you there.

**[ANSWER: No]** I'm sorry to hear that, and no worries. I can email you the event information and will have a new name badge for you to pick up at the registration table. To confirm, your email address is: jim.jones@gmail.com. We look forward to seeing you there.

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