



Events Checklist

Follow these steps to ensure you're creating memorable, strategic experiences that **drive business growth and client engagement**

Pre-Event Planning

- Define clear event objectives (lead gen, education, client appreciation, engagement)
- Choose your event type: virtual or in-person
- Identify target audience and relevant topic
- Choose the date/time, select a location, set your budget and define your goals

Event Design

- Develop agenda and presentation materials
- Identify potential speakers/strategic partners:
 - Collaborate with complementary businesses
 - Virtual: Local estate planning attorneys, real estate agents, tax professionals
 - In-Person: Local wineries, yoga studios, wellness centers

Marketing and Promotion

- Design event branding
- Create a registration landing page
- Develop an email marketing campaign
 - Initial invite (2-3 weeks prior)
 - Reminder emails (1 week, 1 day, day of event)
- Post on social media + create a LinkedIn Event listing
- Reach out to potential partners/influencers
- Send personal invitations to high-value prospects



To build excitement, use language such as: *“Several attendees have asked about bringing guests. RSVP now to secure your spot and guest invitation.”*



Logistical Preparation

- Virtual:
 - Test webinar platform, audio and video equipment
- In-Person:
 - Venue confirmation and technical set up
 - Registration process
 - Digital or physical sign-in
 - Don't forget name tags!

Event Execution

- Arrive early
- Always engage audience through:
 - Virtual: Q&A interactions and chat
 - In-Person: use first name and facilitate networking
- Capture photos/testimonials

Post-Event Follow-Up

- Send personalized thank-you emails
 - Virtual: send a replay with summary
 - In-Person: share event photos
- Offer a follow up meeting
- Conduct feedback survey
- Nurture leads with relevant content

Performance Evaluation

- Analyze attendance and engagement metrics and feedback
- Identify improvement opportunities for future events!

Don't Forget to Repurpose Your Event

- Transcribe a virtual webinar
 - Create short clips for YouTube and social media (plus video transcript for SEO)
 - Develop related blog post
 - Update landing page with replay
- Post in-person event pictures:
 - On your website
 - On social media

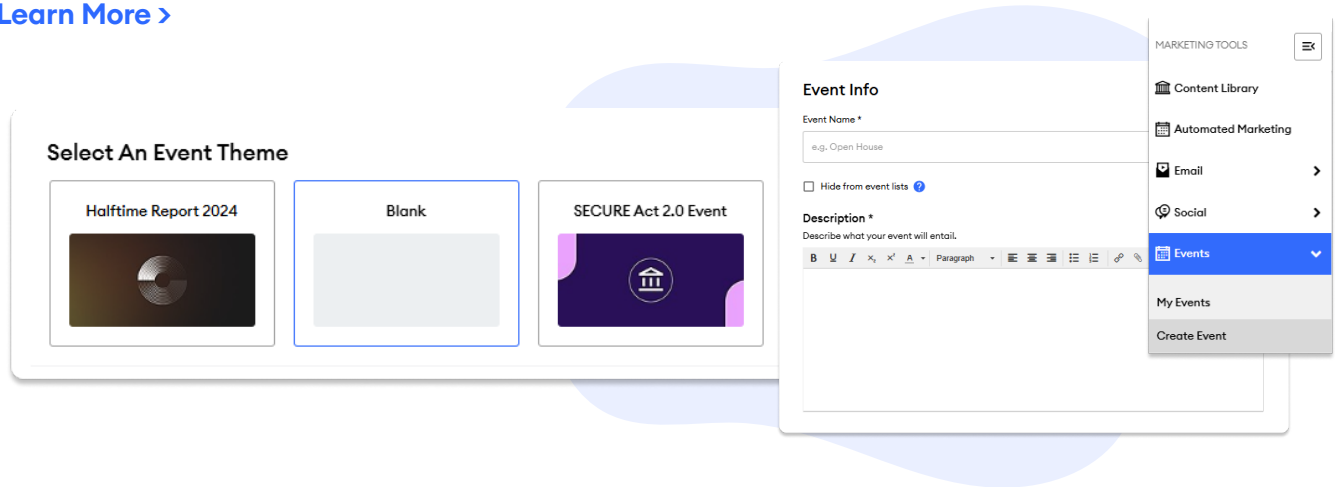




FMG's Event Tool

FMG's Event Tool makes event management easy! Enjoy the flexibility of pre-built templates and customizable templates and content, and harness the power of automation and registration tracking.

[Learn More >](#)



FMG's Event Tool has been a game-changer for promoting our client events. We love that it's so easy to use and creates a landing page to capture RSVPs all within the FMG platform. We are getting fantastic response rates; it saved us time with compliance, and having everything tied in with our website makes our promotions work even better!

Kevin Blondina
B & D Group

Free Consultation Offer:

Start transforming your marketing with a free 20-minute consultation tailored to your goals. We'll dive into your specific goals and show you exactly how we can help you achieve them—with as much or little effort on your part.

[Schedule Now](#)