

The background of the cover is a photograph of a tropical scene. In the foreground, a tall, slender glass filled with a dark red beverage is garnished with a small, yellow, patterned paper umbrella. To the right of the glass, a whole coconut sits on a green, textured surface that looks like grass. In the background, a string of colorful, star-shaped decorations in shades of pink, white, and yellow is visible. The title text is overlaid in the center of the image.

SUMMER LUAU EVENT MANUAL

Introduction

This system is designed to assist you in driving the best prospects to you and your practice—the best prospects being REFERRALS.

Even though referrals are the best prospects, you should never come right out and ask for them from your clients. It is awkward for them and should be awkward for you. Instead, you want to make it extremely easy for your clients to voluntarily give them to you.

That is the purpose of our Client Event Marketing System—It is to create a WOW! experience for your clients to bring friends to. This is done through the everyday things that you do for them in your practice as well as monthly and quarterly events that make it fun and exciting—an *experience*—to be a client in your practice. You want your clients to *love* you. If they love you, they will talk about you.

Our goal is to make it as easy as possible for you to utilize event marketing in your practice. Just think, if you were to have four quarterly events a year with 25 clients and 25 of their friends at each, you would see 100 extra people that know and like you, and that you have a great chance at bringing on as a client. How much would it cost in seminars to get 100 people to know and like you?

Hawaiian Luau Event

This event is great to hold outdoors in the beautiful summer weather, or you could just as easily host it indoors during the winter, when people might need a reminder that spring and summer will indeed come again. Your staff will have a great time planning this event! We found a website that has great ideas for music to play at your event, and other fun suggestions: www.hawaii-luaus.com

COST: The cost for this activity varied by what you are planning. You could arrange for this event to be catered at a park or event venue. A fun idea would be to have someone come teach a hula dance to your guests (check with your local dance academy or adult community education). The costs are well within a reasonable range to keep this activity well under \$2000 for a large group of people.

WHERE TO HOLD THE EVENT: You can host this event outdoors at a local park, rooftop venue, country club, etc. You could also use a local event venue (places that would be used for a wedding or business reception). Keep in mind, some event venues may have an outdoor space as well. If you plan to have the event outside, be sure to have a back-up plan in case of inclement weather (either a shelter/tent or an alternate indoor location).

WHO /HOW MANY TO INVITE: You can base who you invite on past response and who you think would bring you the best referrals. The goal would be to invite at least 25 clients, who would bring 25 referrals for a total of at least 50 at each event. Depending on the location, the amount of guests that can be accommodated may vary, but most should be able to hold a group of 25-50.

INVITATIONS: At the back of this section we have included a sample invitation. You can bring this to your local printer and have them make one specific to your event and needs. The fee for this service is nominal. Based on how many you are planning to invite, you may need to mail the invites to specific individuals or it can be added to and sent out with your client newsletter.

My General Event Plan

Event date: ____/____/____ Event time: _____ How many: _____

General Itinerary:

Activity Planned: _____

Location: _____

RESERVE EVENT SITE: Contact the venue to arrange the details of the event. You should do this 6-8 weeks before the event to give both yourself and the venue ample time to arrange the details.

☐ Reserve Venue

Name of Venue: _____

Phone Number: _____ Contact: _____

Date: _____ Time: _____ Number They Can Accommodate: _____

☐ Caterer/Staffing:

Is there a specific caterer that must be used: _____

Name: _____

Phone: _____

Will venue staff be serving the meal or the caterer: _____

Is there an additional charge for staff: _____ If yes: \$ _____

Will the venue or caterer be providing the table settings: _____

☐ Décor:

What is included with the rental fee: _____

Are additional items available for an additional fee: _____

☐ Arrange time to meet with the venue so you can discuss details

Date: ____/____/____

Time: _____

Meeting Contact Name: _____

Additional information: _____

FOOD: If you're hosting the event at a venue, you may need to book a specific caterer. Your caterer may have ideas for Luau appropriate food. If not, some ideas are: a hog roast/shredded pork sandwiches, glazed ham with pineapple, tropical fruit, Hawaiian drinks, etc.

☐ **Reserve Caterer**

Name of caterer: _____

Phone number: _____ Contact: _____

For how many people: _____

Price per person: \$ _____

Event Date: ____/____/____ Time food will be served: _____

☐ **Additional details:** _____

☐ **Discuss the food options**

Appetizers: _____

Main Course: _____

Dessert: _____

Drinks: _____

GIFTS/PRIZES: Make sure to bring pens, slips of paper for attendees to write their name on and a container to place the drawing slips in. There are many great ideas that cost well under \$5.00 (candles, picture frames, kitchen towel sets, local discount gift cards, scratch off lottery cards etc) —try to keep gifts to the luau theme. Also make sure to get enough leis for all of your guests. A great website for inexpensive gifts and decor is www.orientaltrading.com or www.partymart.com or you could visit a local dollar store.

GETTING THE MOST FROM YOUR REFERRALS: This after all is the point of holding the event! Make sure to add all referred guests to your prospect drip list. In order to get their contact information, make sure you take a clipboard with paper attached to write it down on. Towards the end of the event, personally thank each referral for attending, hand them their *Personal Organization Kit* (explained below), and ask them for their contact information so you can send them your monthly newsletter. You have done so much for them they would be hard pressed to say no!

PERSONAL ORGANIZATION KIT: You will need to make a kit for each referral that attends. To make the kits you will need to print the *Personal Organization Kit Brochure* and the *Record Retention Guide*. You will also need to print a letter that explains to them what they are receiving and thanking them for attending the event. You will need to type this onto your Company Letter Head. Place everything in a large envelope and personally give to each referred guest. Don't forget to ask them for their contact information so you can add them to your prospect drip list!

Luau Event Check List

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8 Weeks Before Event Date:

- ☐ Reserve venue/discuss details
- ☐ Reserve caterer

6 Weeks Before Event Date:

- ☐ Prepare invitation list
- ☐ Bring invitation to printer

5 Weeks Before Event Date:

- ☐ Mail invitations
- ☐ Call caterer discuss details

3 Weeks Before Event Date:

- ☐ Purchase prizes to give away
- ☐ Have *Personal Organization Kit Brochure* printed

1 Week Before Event Date:

- ☐ Make attendance list for RSVP's
- ☐ Confirm details with venue
- ☐ Confirm details with caterer

Week Of:

- ☐ Make *Personal Organization Kit Packets*
- ☐ Make nametags

Day Of:

- ☐ Double check you have all items needed
- ☐ Have FUN!!!

Day After:

- ☐ Enter all of your new referrals into your drip list
- ☐ Prepare thank-you article for newsletter or individual thank you cards
- ☐ Print pictures and display in office

**Invite a friend &
join the FUN for a...**

A Hawaiian Luau

Invite a friend and join us for a Hawaiian Luau. We will be having a Luau feast, hula lessons, games and prizes. So dig your Hawaiian shirt out of the closet, and come prepared for an evening filled with good food, good friends and lots of FUN!

Luau Feast

When: Saturday, April 1

Where: Central Park

123 Circle Drive NW, City

*In case of inclement weather, luau will be held at:
Event Center, 133 State Street, Room 123, City*

Time: 6:00 p.m.-9:00 p.m.

RSVP Required By: xx/xx/xx

Call: 800-555-5555



What do you need to bring? A friend - we'll provide everything else! This is a great way for us to meet others JUST LIKE YOU!

Hula Lessons

Prizes!



**Sponsored by Advisor Name
and Company Name**

This is our way of saying "Thank You!" This is not a workshop or a seminar... just a FUN TIME for YOU and a FRIEND to enjoy! So mark your calendars, save the date and join the FUN!