

# YOUR GUIDE TO CLIENT APPRECIATION EVENTS

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# HOST AN AMAZING CLIENT APPRECIATION EVENT

**Special events are excellent relationship-building tools and valuable for both client retention and prospect generation. Financial services professionals who regularly host events say the same:**

“At my first client appreciation event, I had 35 people attend. I stayed with it and 3 years later I had 175. Every year, I do an additional \$1 million in fixed indexed annuity and investment business that I attribute directly to my client appreciation events.”

-B.A.

“After a couple years of getting only a few referrals at our client appreciation events, we tweaked our presentation so it wouldn't be over-the-top sales and would preserve the integrity of the event. Our new presentation got 52 referrals the very first time.”

-B.M. and K.M.

“I hold several client events throughout the year that focus on fun and keeping my clients happy. I don't even ask my clients for referrals at these events, but because they have such a great time, they end up referring people anyway.”

-R.K.

Don't miss out on an amazing relationship-building and prospecting opportunity. For prospecting, you can consider giving your clients a plus-one for a friend who may be interested in your services, instead of simply asking for a referral that you'll try to contact later.

This guide explores that and more — from choosing the type of event you want to host to event-specific special considerations and pro tips. In the back, you'll even find a step-by-step checklist to follow as you plan your event.

# SELECTING YOUR EVENT




To choose what kind of event you want to host, it can be helpful to identify what you're looking for in three main areas:

- **DIFFICULTY** | Amount of work to plan and execute
- **COST** | Average per-person event cost
- **CLIENT INTERACTION** | Amount of face-to-face client interaction

Below, we've pre-selected several impactful events and ranked them from lowest to highest in those key areas.




## OUTDOOR BBQ

An outdoor BBQ is a low-cost, informal way to connect with your clients and potential prospects.

Difficulty   
Cost   
Client Interaction 




## PRIVATE MOVIE SCREENING

Rent out an entire theater for a private movie screening and show your clients they're VIPs to you.

Difficulty   
Cost   
Client Interaction 




## MINOR LEAGUE SPORTING EVENT

Catch the superstars when they're still rising stars at a local minor league sporting event. Minor league teams are famous for injecting fun into their games, and you can be part of the action.

Difficulty   
Cost   
Client Interaction 




## LOCAL CRAFT CREATION EVENT

Some hands-on fun making a work of art can help you connect with your clients and prospects. Painting, stamping, stitching, gluing — create a craft and stronger relationships all at once.

Difficulty   
Cost   
Client Interaction 




## WINE TASTING EVENT

Wine tasting provides an opportunity for an elegant, low-pressure environment that gives you quality time with your clients.

Difficulty   
Cost   
Client Interaction 

## GOLF TOURNAMENT

A little friendly competition can be a great way to engage your clients and prospects. Round up a few foursomes and host a tournament of your very own.

Difficulty   
Cost   
Client Interaction 



# OUTDOOR BBQ

Recommended number of attendees: 20 - 200

Cost per person: \$10 - \$25



## DIFFICULTY

It will fall on you and your team members to select a space, decorate it, buy food and beverages, and prepare the food. A BBQ can be more labor intensive than other events.

## COST

The upside of you doing a lot of the work is that the price tag on an outdoor BBQ can be a bit lower than other events.

## CLIENT INTERACTION

It will fall on you and your team members to select a space, decorate it, buy food and beverages, and prepare the food. A BBQ can be more labor intensive than other events.

## SPECIAL CONSIDERATIONS

You can host a BBQ at your home or office, eliminating the cost of renting a space, or you can consider a local park with a pavilion or a local beach.

You'll want to have a contingency plan in case the weather doesn't cooperate and renting a tent might be a good way to stay outdoors in the same space regardless of rain. That would add to your total event cost, though.

### Pro Tips

- A good place to start looking for space ideas is with your community's parks and recreation association — they may be able to give you good suggestions based on the expected size of your group.
- Try buying from bulk stores where you can get a larger quantity for a better price, because you'll want to have enough food for a range of people.
- Decide ahead of time whether you'll be providing alcohol and if you're OK with people bringing their own. Communicate that information in your invitations.
- If you want to work the crowd choose a grillmaster who knows how to cook a variety of items, so you don't have to worry about how the food is turning out.
- Bonus points for requesting dietary restrictions and food allergies from attendees to help determine your menu.

**If this event meets your goals, use the checklist on the back page of this guide to help you make it happen.**

# PRIVATE MOVIE SCREENING

Recommended number of attendees: 100 - 150  
Cost per person: \$10 - \$25



## DIFFICULTY ● ○ ○ ○ ○

The staff at the movie theater of your choosing will work with you to help you make necessary decisions, and you'll have the option to roll snacks and soft drinks in with your package.

## COST ● ● ○ ○ ○

The per-person cost of this event will go down as the number of guests you invite goes up. Much of the cost is related to the individual screening, so this event lends itself to having more guests.

## CLIENT INTERACTION ● ○ ○ ○ ○

Aside from an opportunity to present before and/or after the screening, this event will not provide significant face-to-face client interaction.

## SPECIAL CONSIDERATIONS

You'll want to choose both the movie and theater carefully. The more easily accessible the theater is and the more interest there is in the movie, the better your attendance will be. A kid-friendly movie could also draw parents and grandparents, if that's an audience you're trying to reach.

### Pro Tips

- Discuss packages with the theater. You might find that you can get a better rate on a package that comes with soda and popcorn, which is also a great touch.
- When you contact the theater, ask them about their audiovisual setup. You may have the opportunity to present on the big screen for 10-15 minutes.

**If this event meets your goals, use the checklist on the back page of this guide to help you make it happen.**

# WINE TASTING

Recommended number of attendees: 10-50  
Cost per person: \$40 - \$60



## DIFFICULTY ● ○ ○ ○ ○

Work with the team at the winery of your choosing to organize your event. They'll be able to help you with many of the decisions and preparations.

## COST ● ● ● ○ ○

Tasting costs vary widely from one venue to the next, but you can plan on a total cost in the mid-range of client appreciation events.

## CLIENT INTERACTION ● ● ● ● ○

Together in a warm setting with your guests, you can count on a great deal of face-to-face client interaction.

## SPECIAL CONSIDERATIONS

As you are choosing your venue, be sure to ask if the winery has private tastings or if your group will be part of a larger group.

Ask them about their audiovisual setup and determine how you want to present to your audience before or during the event.

It may seem obvious but be sure to communicate to your guests in the invitations that it is a 21-plus event.

### Pro Tips

- When the bartender brings out a new bottle of wine, consider bouncing from one group to another.
- Some wineries may have a food and tasting package, so look into all your options.

**If this event meets your goals, use the checklist on the back page of this guide to help you make it happen.**

# LOCAL CRAFT EVENT

Recommended number of attendees: 10-30  
Cost per person: \$40 - \$60



## DIFFICULTY ● ● ○ ○ ○

The host of the craft creation event will help you with preparation, but you may be responsible for bringing snacks, beverages, and/or craft supplies.

## COST ● ● ● ○ ○

You can expect a mid-range cost per guest, but the good news is that the cost will include sending them home with something that will remind them of you and your event.

## CLIENT INTERACTION ● ● ● ● ●

Assuming that you participate in the crafting event, you will be anchored in a location where you have a captive audience with your clients and prospects.

## SPECIAL CONSIDERATIONS

As you are choosing your venue, ask if the space has private crafting events or if your group will be together with others who aren't part of your event.

You'll also want to ask them about their audiovisual setup and determine how you want to present to your audience before or during the event.

Once your headcount is finalized, confirm it with the venue so they can purchase the appropriate amount of crafting supplies and make other accommodations as necessary.

### Pro Tips

- If beer, wine or cocktails will accompany the crafts, you'll want to note that this is a 21-plus event.
- Add images of the crafts that will be created to your invitations to generate excitement.

**If this event meets your goals, use the checklist on the back page of this guide to help you make it happen.**



# MINOR LEAGUE SPORTING EVENT

Recommended number of attendees: 40 - 60  
Cost per person: \$50 - \$80



## DIFFICULTY ● ● ● ○ ○

Minor league teams regularly host events like this, but you'll want them to walk you through catering options and different spaces.

## COST ● ● ● ● ○

Due to ticketing, food and beverage options, and the size of your guest list, there is a significant but manageable cost to host an event of this type.

## CLIENT INTERACTION ● ● ● ○ ○

You'll be able to control your own destiny with client interaction. You can start with a presentation and then watch the game with various groups or anchor yourself largely with the same people.

## SPECIAL CONSIDERATIONS

Minor league teams may have different reserved spaces — not just suites but also balconies, decks, and patios that can be rented out. Discuss all your options with the events coordinator.

Consider the location of the team's field or stadium when choosing your event. You'll want to pick a space that your clients and prospects will be able to get to easily.

### Pro Tips

- Depending on the size of your group, you may also be eligible for one of the entertaining games between innings or quarters! Make sure to ask.
- Try to secure a package where food is included — this will save you money in the long run and it's appreciated to purchase food for your guests.
- If a suite is within your budget, it will allow you to talk more intimately with guests.

**If this event meets your goals, use the checklist on the back page of this guide to help you make it happen.**



# GOLF TOURNAMENT

Recommended number of attendees: 40 - 50  
Cost per person: \$120 - \$150



## DIFFICULTY

Golf tournaments generally have multiple components to consider. There's the actual golf; then there's the space that you may want to use to present before the tournament and potentially serve dinner after.

## COST

The value of this event will not be lost on your guests, who will know that you made an investment to host them. But it is an investment nonetheless.

## CLIENT INTERACTION

You can choose if you want to golf with a foursome of high-value clients, or grab your own cart and spend time with different groups throughout the round.

## SPECIAL CONSIDERATIONS

The team at your chosen golf course will be well-versed in how to host tournaments. You will want to lean on them in helping you make choices regarding your tournament and suggestions on how to communicate them to your guests.

One of the big questions is what kind of tournament you'd like to host: scramble, best ball or another type. If you don't know what those words mean, you'll want to chat with them and educate yourself so you can clarify for your guests, too.

Finally, you'll want to decide who you'll pair together in your foursomes. One good idea is to pair prospects with trusted clients, who will speak highly of you and your services.

### Pro Tips

- Be sure to reserve a space after the tournament so you can gather and talk. This is going to get you more face time with clients and prospects. A trophy for the winners and championship ceremony can be a good way to get guests to stay at the course after the tournament.
- Provide a cheat sheet to the golfers to help them understand the tournament rules.
- Assign your staff to specific holes with a water station or something similar — this gives your clients some face time with the staff members they interact with.

**If this event meets your goals, use the checklist on the back page of this guide to help you make it happen.**

# CLIENT EVENT CHECKLIST

Following this checklist can help you carry out an event your clients will love. This checklist is a general guideline, but many variables can affect the timing and need for specific tasks.

## EIGHT WEEKS BEFORE EVENT

- Select restaurant/venue
- Select entertainment, if applicable
- Finalize times/dates with vendors
- Negotiate menu and pricing
- Request logo from the restaurant in an electronic form to add to advertising

## SEVEN WEEKS BEFORE EVENT

- Determine your invitation list
- Create content and design for your mail piece or e-mail
- Send your marketing materials to compliance

## SIX WEEKS BEFORE EVENT

- Send mailer and mailing list to the printer/mail house

## FIVE WEEKS BEFORE EVENT

- Create a call-in script for taking reservations
- Send "thank you for registering" emails as reservations come in.
- Include map to venue and your bio in email message, if applicable

## TWO WEEKS BEFORE EVENT

- Meet with the restaurant staff to discuss room set up and timing
- Prepare your presentation for addressing the group

# CLIENT EVENT CHECKLIST

## ONE WEEK BEFORE EVENT

- Secure door prize, if applicable
- Print check-in list and other necessary print materials
- Organize a team meeting to cover last minute details:
  - Run through presentation
  - Remind them to dress appropriately
  - Review the task list and responsibilities
  - Encourage them to mingle but not spend too much time with one prospective client

## DAY OF THE EVENT

- Dress professionally-- usually dictated by your area and style of event
- Arrive at least one hour early
- Set up and check all equipment to ensure it is working properly
- Meet up with venue staff that will be working your event to review the game plan
- Assign a team member to take pictures at the event, and use them to promote it on social media
- Start your presentation on time
- Save some seats in the back for late arrivals
- Instruct a staff member to wait outside for anyone that may show up late
- Following your presentation, go around the room and personally thank them for attending

## AFTER THE EVENT

- Debrief with your staff-- discuss what went well, areas for improvement, and things to do differently at the next event
- Send handwritten thank you notes to every attendee