

Doctor's Guide to a Successful VIP Event:

How to Create an Affair to Remember



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A few years ago, a friend threw a birthday party for a small group of gal pals.

She got the idea to hold it in a lovely European shoe boutique designed by Nate Berkus. The owners were thrilled to give my friend the space for the event because she and her friends were likely customers. The place was heaven on earth for women who appreciate Christian Louboutin and other high-end shoe designers.

The party guests were served champagne, hors d'oeuvres, and cake while they tried on the latest strappies, work flats, and boots. Years later, everyone still talks about what a great party it was. And in addition to everyone having a great time that night, the boutique's cash register rang up a few thousand dollars in sales.

My friend's champagne and shoes party illustrates an important point. If you bring a group of people who have similar tastes and circumstances together for an exclusive event, they'll not only have a good time, but they may spend money if there is something relevant for them to buy.

Go Beyond a Basic Open House

General information events have become passé. Valentine's Day and holiday parties are expected. Patients have been there, done that. We believe you can set your practice apart by hosting events that are uniquely themed and offered to a small and "hand-selected" group of patients and their friends, plus the practice's influencers and referrers. I refer to these as **VIP events**, and they are an alternative to the open house or annual thank-you event. Although both have their place, a VIP event requires a completely different mindset.

VIP events are less like a new store opening and more like a private party. They are a board meeting as opposed to an annual shareholders meeting. Or a chamber music salon, not Beethoven's Fifth at an orchestra hall.

Such events are not intended to be the invite-everyone sessions that your competitors offer via mass-invitation emails or social media posts (rather than an exclusive Facebook group or targeted email list—more on this later). The VIP event is not supposed to attract 80-100 people, because a larger crowd is not necessarily a better crowd. These exclusive events are intended to entertain a great mix of fewer guests. This could be people who have an interest in looking and feeling good, or who will bring a friend who has similar interests. VIP events are an alternative to the "come one, come all" event.

Such events have a penchant for the less predictable. For example, instead of hosting an event for brides-to-be, it may make more sense to focus on helping the happy couple's parents and wedding party be their "photo-ready best." Or maybe the theme is a pre-Thanksgiving gala to celebrate the bounty of the fall harvest. Or a salute to new college grads to help them feel confident as they enter the professional workforce.

VIP events require you to shift your thinking from "more is better" to the creation of an experience that is relevant to a highly targeted group. Think of this as a velvet rope approach, similar to the one used by high-end restaurants to generate excitement for a celebrity chef's tasting menu, or exclusive clubs to drive anticipation for a one-night-only DJ event. These events have a certain cachet, so of course everybody wants to be there.

Sending an email to everyone in the database or promoting the event on your social media page does not say "exclusive." Similar to a trunk show at Nordstrom or the launch of a new club, a VIP event is by invitation only. The guest list is curated through an exclusive Facebook group or tailored email list. Invitees are called (not emailed) if they haven't sent an RSVP by the deadline and politely asked if they will attend and bring a friend. The velvet rope approach is appreciated by your high-end clients and patients who have made significant investments in their appearance and at your practice. An event using the velvet rope approach has these characteristics:

1. A specific business purpose and goal.
2. Limited attendance.
3. Exclusivity by invitation only or invite-a-friend.
4. The theme, activity, content or speaker is thoughtful and unique as opposed to a presentation about procedures and products by the doctor and the aesthetician, respectively.
5. Fun, interesting, and not all about you or your practice.

I can almost guarantee that your competitors aren't hosting events such as these. Use this fact to your advantage and you'll become the practice that hosts affairs patients will remember.

Dare to Think Differently

Help your practice stand out by going beyond the “surgeon and services offered” presentation at your event. In fact, the more off-beat and intriguing the event, the more people will remember you for it.

A physician on the West Coast hosts several events each year to reward referrers and influencers. His patients range from artists and musicians to celebrities and venture capitalists. When a friend was launching his first book, this physician threw a fete in his honor. The cocktails and small bites party was held in the urban office space of a financial advisor (a patient), where a well-known photographer’s latest work adorned the walls. Guests enjoyed a book signing, a marvelous photography show, and ample space for conversation and connections. The physician’s one and only role was to be a gracious host.

At some VIP events, the physician’s one and only role is to be a gracious host.

How can you create an exclusive experience that will delight your guests and achieve your business goals? What would the theme be? Could you collaborate with other businesses or complementary aesthetic specialists, such as an aesthetic dentist, LASIK surgeon, or other non-competing physicians who make CareCredit financing available to their patients? Could you invite a speaker to address a topic other than aesthetic surgery, such as someone who speaks about various perceptions of beauty, or the curator of the local art museum? With a few phone calls and a little Google searching, you will unearth some interesting options and local experts you hadn’t previously considered, but that could be very appealing to your clientele.



Some concepts for your VIP event could include:

What Makes a Great LinkedIn Head Shot?

Hire a professional photographer to give a brief talk and a stylist to fluff your guests’ hair before having their photos taken. Your guests for this event could be employed professionals. Generate a report from the practice management system by occupation to compile a guest list.

20th Century Perspectives on Beauty

One doctor gave a fascinating talk on how the perspective of eyebrows has changed over the 1920s, 1930s, 1940s and 1950s. From tweezing a fine line, to Joan Crawford’s and Brooke Shields’ bushy brows, ideas about the “ideal brow” have not remained constant. Such a presentation could be integrated with a discussion of blepharoplasty or forehead lift, and how brow shape and current preferences intersect with the surgeon’s artful approach to harmonizing the face. With a little bit of research, this is a talk the doctor can assemble and deliver.

Come in for a Touch-Up, Our Lips Are Sealed!

Invite a small group of injectable and skin care patients to bring a friend to a special makeup presentation, like the ones offered by Brian + MW (brianandmw.com). You might ask the artist to give a presentation such as My Top 5 Aesthetic Tips & Tricks for Professionals. Ask several guests (or staff) ahead of time to have their makeup done at the event. The rest receive the gift of a complimentary coupon (negotiate a volume discount with the consultant). NOTE: If you are going to take photos of guests at the event, don’t forget to have everyone sign a release so you can use the photos in your social and digital media.

“God Save My Shoes”

This fascinating one-hour film documentary explores the intimate relationship between women and shoes. Rent out a small local theater or conference room in a boutique hotel and show the film. Host a physician “meet and greet” in the lobby afterward, with drinks and snacks. You might consider having the physician speak on under-the-foot injections that can alleviate the pain that results from wearing high-heeled shoes.

Tech Tuesdays at Dr. Smart’s Office

Hire an Apple coach to teach guests “tips and tricks” for optimizing their use of iPad or iPhone features. Hold a session that explains rating sites for everything from food to shoes to doctors. Show your guests the most efficient way to edit and store photos and make digital photo albums. As part of the event, guests may choose to take and send selfies at the med spa or office and post them to social media.

Health, Wealth, and You

Professional individuals may appreciate a practical presentation on personal finances. Invite a wealth manager or financial advisor to speak at a private club. This is one of many topics that lends itself to a venue outside of your office.

Before You Begin: Give Your Event Planning a Lift

In my 30+ years of working with aesthetic practices, I continually observe avoidable missteps that prevent practices from maximizing the impact of their events. Before you begin planning a VIP experience, be aware of and avoid these common mistakes:

1. Confusing party with purpose.

The purpose of a VIP event is to create more and stronger relationships and be less transactional. Each event should have business goals. "Come learn about our services!" is unfocused.

2. Scheduling too little time to plan.

Deciding to do a Valentine's Day event on January 20th is a surefire way to fail. Ideally, I recommend three months from date of decision to date of the event. A hastily (and usually poorly) conceived invitation and inadequate guest list building are two of the errors you'll avoid with proper planning.

3. Selecting the wrong facility.

Don't insist on holding the event in your office if space is limited or inadequately designed for a group presentation and refreshments. And even if the space is not an issue, holding an event in a boutique hotel or private club may be a more elegant and exclusive approach.

4. Inviting everybody on your Facebook page or email list.

If the guest list isn't selective, no one will feel special. It's a cattle call. Your invitation will compete with everything else in people's already overcrowded inboxes and news feeds. Instead, invite your most engaged followers to an exclusive Facebook group or curate a highly targeted email list.

5. Amateurish invitations and graphics.

Both show a lack of sophistication and don't convey confidence about your attention to aesthetic detail.

6. Outsourcing too much planning to the reps.

Many practice staff say they are "too busy" and delegate critical steps to vendor reps. Although reps can be helpful, remember that their primary interest is elsewhere. Yours is in your relationship with patients.

7. Poor orchestration and execution.

The manager doesn't delegate well and gets overextended. Details aren't done until the last minute. Staff is in the dark about what's going on and what to tell callers. And no one sets expectations for what staff is to do or say at the event, so they huddle together instead of talking with your guests.

8. Failing to capture critical information at the event.

If it's no one's job to collect information and email addresses from every guest, or you don't provide your custom link and QR code for guests to apply for the CareCredit credit card, you are missing huge opportunities.

9. No planned follow-up.

The day after the event, it's business as usual. No one is assigned the task of calling, emailing and personalizing the follow-up or taking action, so you miss the opportunity to cultivate relationships established at the event.

10. Tracking return on investment (ROI) is nobody's job.

The point of having this event is to build relationships that are meant to last. If you don't calculate ROI, you have no idea if you have succeeded.

With a little planning and preparation, your practice can avoid missteps and achieve much greater success.

Help your practice stand out **by going beyond the "surgeon and services offered" presentation** at your event.



The following guidance will help you keep the practice on track. Use the checklist at the end of this paper to guide your practice through important details.

1. Pick your purpose.

What is the business goal? What are you hoping to achieve? Are you rewarding patients for their business and referrals? Introducing a special offer? Don't overlook this essential planning step. Here are a few examples of an effective purpose for an event:

- Attract a targeted demographic of likely surgical candidates. For instance if the focus of the event is facial rejuvenation patients, you might sort your list by patients aged 40-60 years old.
- Reward facial rejuvenation patients. Offer an interesting program and a special gift that encourages the purchase of additional products and services. Encourage them to bring a friend to enjoy the reward too.
- Convey a limited-time offer such as preferred pricing on a new skincare program, injections, technology, or a particular surgical procedure.
- Fill the surgery schedule during a predictably slow, low revenue month. Offer a fee reduction if the surgery is scheduled within a week of the VIP event. One surgeon tried this with blepharoplasty and combined it with the use of "99" pricing by offering a package price of \$3,999 for the professional and facility fee. The result: He scheduled six blepharoplasties in the month he was aiming to fill—the same number of blepharoplasties the surgeon had done in the entire previous year.
- Promote a new partner, aesthetician or technology in your practice.

Finally, think beyond just scheduling surgery and selling products. For instance, what could you celebrate? A breast surgeon in the West hosts an annual celebration for breast cancer survivors. She invites her breast reconstruction patients to her med spa where they are pampered with spa treatments and chair massages. The purpose is to celebrate courage and life—and the result is a stream of great word-of-mouth referrals.

2. Give the staff three months to plan.

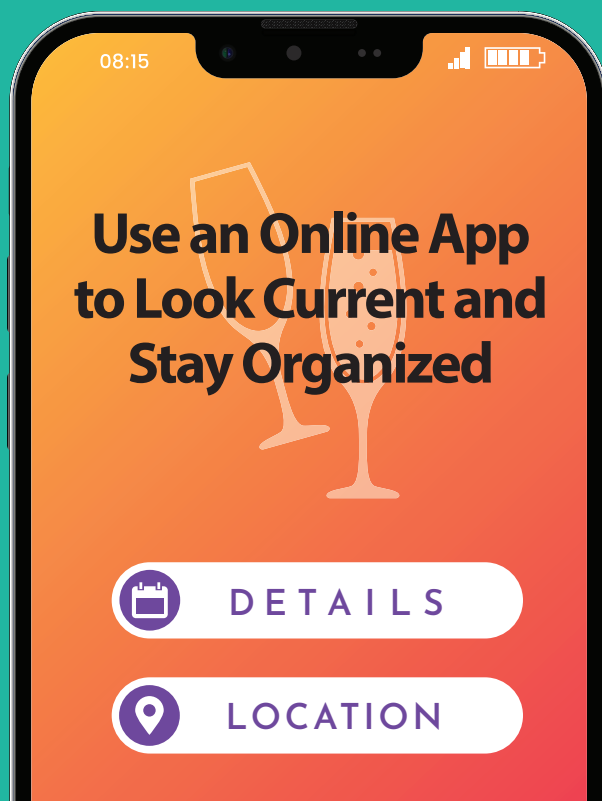
Let's face it: Something always goes wrong. Staff quit. The office gets hyper-busy. The caterer is booked. You can't find a speaker. The printer is late. Calendars get full. You want ample time to do things right. It may take three months or more to plan an A+ event. Give your team sufficient time for success.

3. Assign a logistics captain, but keep the whole team in the loop.

This is not a project for only the manager. Although they are typically in charge of coordinating the catering, decorations, promotion, reps, goodie bags, invitations and more, delegation is critical and everyone must be in the know.

Hold a kick-off planning meeting for the entire staff. Let them know the purpose of the event and the financial goals you've set. Gather input. Assign roles. Develop bullet points that answer the key questions callers will have. Tell everyone when you plan to mail invitations and send emails, so they can be prepared for an influx of calls or emails to the practice.

The logistics captain should send regular email updates to the entire team, so everyone from the receptionist to the injection nurse can accurately answer patient questions. Provide frequently asked questions for the front desk staff. They will receive the most calls, and must sound knowledgeable and capable when callers inquire.



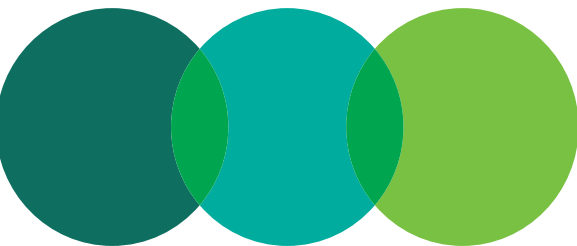
Using an online app such as Eventbrite (eventbrite.com), which is free to use for free events, can improve the professionalism of the RSVP process and keeps things organized.

Create a private event and design your invitation to include details and a map. Set a maximum number of guests. Make sure you turn off the feature that displays the names of all guests who respond. Your goal is confidentiality.

Send the invitation by email to your target audience and manage responses online. Those who register can automatically save the event to their calendar. And, apps like Eventbrite can automatically send reminders.

Track and analyze the event with the app's reporting and graph tools.

There is no “right” answer to the question “who should we invite?”



4. Define guest criteria and mine your own database.

There is no “right” answer to the question, “who should we invite?” It’s highly dependent on your market, purpose, patient base, and case mix.

The important thing is that you take the time to think about the type of patient who would refer a friend and generate reports from the computer system that identify these patients. And, resist the temptation of inviting everyone on your email and social media lists. Such a tactic is the antithesis of a VIP experience.

You could start by contacting all of your practice and personal advisors — accountant, financial, attorney, insurance agent, stockbroker. Let them know you’ll be mailing an invitation to a special event, and ask if there are other people in the office who might like to also receive an invitation. Consider inviting not only their colleagues but their significant others as well.

The practice management system is a goldmine of information. After you define the theme of the event, mine your database for the right target groups to build the guest list. If you’re unsure about how to get the information and reports out of your system, contact the vendor support line. The data mining should enable you to pull out targeted patient groups to invite. Ask questions such as:

- Which patients have invested the most in your services in the last three years? Set data parameters to generate each patient’s name and procedures they may be interested in.
- Who is a CareCredit cardholder? You can use the Cardholder Available Credit Report to determine which of your patients have the CareCredit credit card and may be ready to schedule their procedure.
- Who are your best existing patient referrers? Who has referred one or two friends in the last year? You want to deepen your relationships with these folks. They are paying you the best compliment, and risking their reputation, by referring you to friends. If you’ve created the right tracking categories and staff ask each new patient who referred them, this data will be easy to obtain on your system’s Referral Source report.

- Who are the opinion leaders in your patient base or circle of influencers? And who would you like to reward and encourage to refer more? One of our clients went through his patient list and identified real estate agents. His reasoning was that if they’re selling million-dollar homes, they probably want to look like a million dollars, and they have clients who are potential word-of-mouth referrals too. Who in your patient base is in a position to influence others? Maybe you have trainers, noted hairstylists, salon owners, makeup artists, a local television anchor, the head of the art museum, or a bank executive who sits on the local business chamber board. Generate reports that list patient names and occupations and you have the basis for a fantastic opinion leader list.
- Which procedures do you want to do more of? Make a list of the top two and generate a report of those patients who had these procedures over the last two years. Review the list and identify the ones who had a great result and are enthusiastic. Invite these patients and ask them each to bring two friends who love their new look. And, have some of these patients speak about their experience at the event. Some blended aesthetic surgeons tell us that breast reconstruction patients are their best and most influential patient recruiters. Creating an event around this patient group is time well spent.
- Who are the past patients to reactivate? These could be injection patients who were coming regularly for several years, but haven’t scheduled recently. Or surgical patients who came for their last post-op a year ago, and you never heard from them again. Or med spa regulars who were sticking to a skin care regime for a while but faded away. Generate a report of all patients who have received services in the last two years. Include patient name, procedures/services, total spent, and date of last visit.
- Who has spent \$5,000 in the practice within a particular time period?

Data queries such as these will result in lists and groups of similar patients, enabling you to target your event’s approach and theme and make it relevant to a high percentage of the guests.



Event Social Etiquette 101

1

Wear professional attire. Make sure staff dress appropriately. Don't "assume." Let them know what you expect of them so they can plan ahead.

2

Be sensible about perfume and makeup.
As the old saying goes, "less is more."

3

Put away mobile devices. Your team should be talking and interacting with guests during the event, not checking their devices. Assign one person as an emergency contact in case a staffer's family must reach someone during the event or for last-minute requests from guests.

4

Cheerfully greet and welcome each guest as they arrive.
Assign several staff to collect information and email addresses for each guest.

5

Use the FORD technique to build rapport with guests. Staff may already know something personal about the guests; this technique can help them further enhance the relationship. Ask guests a few questions about their Family, Occupation, Recreation, and Dreams. People appreciate being able to talk about themselves.

6

Wear professionally designed name tags. Magnetic (as opposed to pins) are the best and cost between \$5-10 each depending on how many you purchase. Include their first name, last name and role.

5. Create invitations that put your best foot forward.

Pay attention to graphic appeal. For goodness' sake, you are an aesthetic practice. What the invitations and other materials look like counts.

Engage a graphic designer and choose high-quality paper for printed invitations. Printed invitations say "special" and convey a different feeling than all-digital invitations. Little things like this matter to the discerning, high-spending patient. Graphics and design should align with your branding. If your local printer's pricing is too high for small print runs, consider TinyPrints (tinyprints.com), which specializes in small orders.

The CareCredit Special Events Kit provides samples and templates enrolled providers can download, customize and print. The templates and other handy resources can be found at carecreditspecialevents.com.

An elegant alternative to the printed invitation is an email service such as Paperless Post (paperlesspost.com) or Evite (evite.com). These services offer beautiful designs that open digitally in creative and clever ways. With both free and paid options, you're sure to find an invitation that's perfect for your event. Make sure you turn off the feature that displays the names of all the guests who respond.

If you want to be innovative, consider a video invitation. In a room with plenty of natural light, use a smartphone, tablet or other video device to record a 30-second to 1-minute video, describing the event and underscoring its exclusivity. Include the link in a nicely designed email invitation.

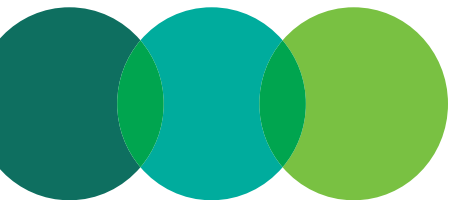
6. Set staff expectations and roles.

Approximately three to four weeks prior to the event, talk with staff about your expectations of them during the event. Don't assume they will know what to do. If you are not clear about how you want them to interact with guests or the tasks they are responsible for during the event, you can't be disappointed if they fall short. Order magnetic name tags for each staff person with their first name, last name and title.

One of the most important roles that staff can play at an exclusive event is that of social host. They are responsible for making conversation and getting to know guests' personal situations. This should start before the event by looking up each RSVP in the computer system. If they are already patients, you have demographic and procedure information, and perhaps more if you've entered good non-clinical notes.

Additionally, observe staff practicing "introduction skills" in at least one staff meeting. You'd be surprised how difficult it is for many people to walk up to someone they don't know and say: "Hi, my name is Sue, and I'm the reception services coordinator." Practice will help reduce anxiety and fear, and enable staff to be better hosts at the event.

VIP events are **exclusive, intimate affairs** that help you strengthen relationships.



As stated previously, the FORD technique is an effective conversation starter that staff can use to connect with patients. With a few casual questions, staff can learn a lot about each patient's "FORD points," as I call them. FORD is also a great technique to use during the consultation and fee discussion.

Beyond the role as social hosts, each staff member should be assigned one or more of these critical tasks during the event:

- Who will capture information about each guest and enter it into the computer system, loyalty program, or e-newsletter service? Put someone in charge so all these data elements are collected for every guest.
- Will people sign in on paper or will you enter them directly into the computer? Who will make the sign-in cards and direct people to enter their information?
- Who will help patients apply for the CareCredit credit card at the event? Make sure you have displays or handouts with your custom link and QR code so guests can see if they prequalify (with no impact to their credit score) and apply for the CareCredit credit card using their mobile device. If approved, they can pay right away for packages, bundled services, or treatment plans to be completed within 90 days.

7. Plan ahead for follow-up.

Several weeks before your VIP event, develop a strategy for who will follow up and when, and the frequency and number of follow-up touch points. For example, the patient care coordinator might be assigned the task of emailing every guest a personal note the day after the event using information gleaned by the team. The reception staff can be accountable for sending email invitations to opt in to your e-newsletter, and deliver a "surprise" special event or offer. These two tasks will help you build ongoing relationships.

Failing to make a plan for follow-up nearly always results in no plan being followed. What you want to avoid at all costs is follow-up calls that go like this: "Hi, I'm Jill calling from Dr. Wonderful's office. Did you have a good time at our event last week?"

Your VIP crowd is too busy for unimaginative questions like this one—which, by the way, can be answered with a simple "yes" or "no," and it is there that the conversation will end before it ever really started.

Because VIP events are small, your team should collect a few good stories and relevant personal information from every single guest. Hold a debriefing meeting the day after the event so that the entire team can discuss what was learned about guests, as well as lessons learned during the event itself. By taking careful notes, the patient care coordinator has personal information

about each guest and can use it in her follow-up phone calls. Some of the best practices for follow-up are:

- Send a "thank you for coming" email within one to two business days.
- Mail a handwritten thank you note on fine stationery within a week.
- Have the patient care coordinator make a phone call the week after the event. Subsequent follow-up calls can be made at three weeks and six weeks post-event. The goal of the call is to get the patient talking by building rapport with FORD. Then, remind them to take advantage of the time-sensitive offer you made during the event, or schedule a consultation, service, or surgery (if they have been in for a consultation already). Your goal will depend on each event's purpose and follow-up strategy.
- Two weeks after the event, compare the guest list against new Facebook page followers and e-newsletter sign-ups to find out who has opted in.

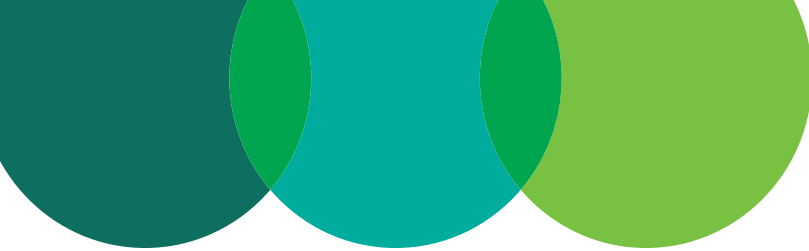
8. Track expenses, calculate ROI.

Expense tracking should begin on the day you schedule the event. Starting off on the right financial foot helps ensure that all costs associated with the event are captured. Sorting through old receipts and invoices retrospectively is time-consuming and often deemed "not worth the effort" when the practice is working at full throttle.

Actually, nothing could be further from the truth. Calculating the ROI of a VIP event is the capstone of the event planning process. It's not hard if you collect information along the way and plug it into a worksheet, which can be easily built in Excel using data from the table on the following page.

Rushing the ROI calculation is a mistake. Consultations and services scheduled as a result of the event may not be complete for at least a few weeks to a month after the event. Caterer and facility invoices may trickle in. Perform the first ROI analysis at three to four weeks after the event, then again at six weeks and 90 days. After 90 days, you'll likely have received all the expenses and the majority of the revenue from the event. Set a calendar appointment to remind you to look up VIP guest service and revenue data for each of the three calculation points.

Conclusion: VIP events are exclusive, intimate affairs that help you strengthen relationships with referrers and influencers, and attract discerning people in highly targeted groups. Unlike open houses, these invitation-only, RSVP-required events are intended for a small number of guests who have a common thread, such as similar spending levels or professions. VIP events are often uniquely themed in an effort to match the interests of those invited. Given ample planning time, a VIP event with a proper purpose can yield greater financial and referral results with less effort than larger events promoted to the entire patient base and external community.



VIP Event Return on Investment (ROI) Analysis

Your specific revenue and expense categories may vary; modify this sample as needed. Consider keeping a list of all of the event's guests in the same worksheet, so that looking up each of their accounts to obtain service and revenue data is easy.

Revenue	3-4 Weeks	6 Weeks	Months
Consultations			
Injections			
Laser Treatments			
Skincare Services			
Skincare Products			
Surgery – Face			
Surgery – Body			
Surgery – Breast			
Other			
Total Revenue	\$	\$	\$

Expenses			
Facility Fee			
Speaker Fee			
Staff Overtime for Event			
Food/Beverage			
Decorations/Tables			
Equipment			
Graphic Design			
Printing and Paper			
Postage			
Email Services*			
Other Marketing Costs			
Product Giveaways			
Goodie Bags			
Other Patient Gifts and Incentives			
Total Expenses	\$	\$	\$
Revenue–Expenses	\$	\$	\$
ROI = Total Expenses / Total Revenue	%	%	%

*Such as Paperless Post, which charges a small fee per invitation sent.



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VIP Event Planning Checklist

Task	Who Is Responsible?
Begin Planning 3 Months Prior to the Event	
Choose a specific purpose for the event and define business goals. Discuss the demographics, generated revenue, procedures, and other criteria for the invitees.	
Determine the ideal number of patients to invite and the number of RSVPs to accept.	
Brainstorm and choose a concept/theme. Will it be all about the physician? Will you have an invited speaker or speakers? Will you have stations through which guests rotate? What kind of food will be served?	
Set a budget that includes: food; decorations; event materials; equipment rental; table and decoration rental; caterer, food, beverages; printing costs, graphic design costs (flyers, postcards, etc.); cost of goodie bag items, prizes, or giveaways.	
Check the community and school calendars to ensure your event does not conflict with something that will compete (e.g., high school graduation or a significant annual gala).	
Based on the concept/theme, determine whether your office is the right location, or if a private club, boutique hotel, or other unique venue is needed. Verify availability and secure the date immediately.	
Work with the manager or vendor to generate computer reports that list the type of patients who meet the criteria for the event.	
Review the computerized lists and make adjustments or additions to refine the guest list.	
Schedule the event speakers.	
Meet with the entire team to provide high-level details and define roles. Discuss the business goals, their role, and other expectations for the event. Share logistics, speakers, etc.	
Discuss expectations for staff at the event: to initiate conversations with guests to learn about them and their needs. Confirm dress code.	
Decide whether you will do printed invitations, a great-looking email invitation, or both. If you plan a video email invitation, begin thinking about the script.	
Customize the templates in the CareCredit Special Events Kit and take them to a local printer. Or work with a graphic designer to create a custom invitation.	
Send the invitations six weeks prior to the event date to allow three weeks for RSVPs.	
Develop FAQs for the front desk so they're prepared when calls start coming in after invitations are mailed.	
Arrange for food and beverages or a caterer.	
Talk with reps about which products they can provide for the goodie bag. If you plan demonstration stations, discuss their participation.	
Order magnetized name tags if you do not already have them.	
Print guest name tags from a laser printer (do not handwrite them). Print each guest's first name only.	
Receive product giveaways and prizes from reps.	
Assemble goodie bags and prepare demonstration stations	
Get the office ready (if the event is in your office). Have it professionally cleaned the day before. Don't forget bathroom supplies and air fresheners/scents.	

Task	Who Is Responsible?
During	
Put all mobile devices away.	
Dress professionally.	
Greet everyone with a smile and make them feel welcome.	
Make small talk and interact to build relationships. Use the FORD technique.	
Collect complete demographic and contact information—especially email addresses.	
Share your custom link or QR code so guests can apply for the CareCredit credit card.	
Be attentive when speakers are presenting.	
Be gracious to your guests until the last one leaves.	
After	
Hold a debrief meeting with all staff the day after the event. Thank everyone for their hard work and participation. Review discussions with specific guests and what was learned. Determine the best person to follow up by phone with each patient. Discuss overall lessons learned.	
Send a "thank you for coming" email within one or two business days. Each email should open with a short personal note.	
Mail a handwritten thank you note on fine stationery within a week.	
Have the patient care coordinator make a phone call the week after the event.	
Two weeks after the event, compare the guest list against new Facebook page followers and e-newsletter sign-ups to find out who has opted in.	
Schedule follow up calls for three and six weeks post-event.	

