Client Communications

Structuring your client appreciation event for success

Follow a step-by-step plan for reaping the benefits of an event

By Fiona Collie | March 14, 2012 12:30

Once your client appreciation event is over, take the time to assess whether or not all your hard work has paid off. That assessment can be divided into three main areas for follow-up.

"If you can define [the event] as well attended, well-received and results oriented," says Sylvia Garibaldi, a business building coach for financial advisors with SG and Associates in Toronto, "that's when you know you've really had a successful event."

A detailed pre-planning process, the size of the event and remembering to follow up are important steps for arranging a successful client appreciation event. Follow these tips to organize a proper guest list and follow-up routine:

1. Look at the numbers
For the biggest impact, your client event should have a small guest list.

"[A small event] creates a more intimate environment," says Garibaldi. "The advisor can get around to chat with each guest and get to know them better."

Most events now have roughly 10 to 15 guests, she says, which means about seven clients, with each client bringing a guest.

To have 10 to 15 guests, you will want to send out about 25 invitations, Garibaldi suggests. Personalize the invitations by writing out the person's name in longhand and adding a short note such as, "I'm looking forward to seeing you there."

2. Find common ground
Make your next client event a hit by carefully selecting your guests.

There are several ways you can choose guests for a client event, says Garibaldi. You could invite top clients, clients who have similar interests or focus the event on one person.

Inviting clients with similar interests, for example a group of dentists or small business owners, makes the dinner conversation easier and provides an opportunity to meet more people in your niche market.

Or you can offer to throw an event for one client who is experiencing a life event, such as retirement or a milestone birthday, Garibaldi says. Holding such an event strengthens the relationship with a top client while also giving you an opportunity to meet the client's friends and family.

3. Use a sign-in sheet
Have a sign-in sheet on hand when clients and their guests arrive. This helps ensure you have everyone's contact information. This will allow you to follow up with new prospects.

4. Ask for feedback
Find out what worked at the event and what needs improvement by asking guests for feedback.

Garibaldi suggests handing out a short survey with a few questions at the end of the event. It's best to do a survey at the event itself because you are more likely to get a response.

If you don't feel comfortable asking clients to fill out a form at the end of a nice dinner, you can use the survey as an excuse to call guests, especially new acquaintances, the next day.

5. Say thank you
Impress clients and prospects after the event by personally following up with them.

"Send a personalized, hand-written thank you card to all attendees," says Garibaldi. "Then follow-up with a phone call to prospects that you want to get to know better."