

INVESTMENT EXECUTIVE

Client Communication

Five tips for hosting successful client appreciation events

Make sure your client events are well attended by preparing carefully in advance

By Fiona Collie | March 13, 2012 12:00

Client appreciation events can play an important part in your strategy to expand your business: paying close attention to the details of such events will help ensure their success — and contribute to your reputation for professionalism.

A well-planned event shows your appreciation for existing clients, says Sylvia Garibaldi, a business building coach for financial advisors with SG and Associates in Toronto. At the same time, it creates an opportunity to meet and connect with prospects.

Important elements requiring careful attention include the event size and the follow-up process. Here are five tips for pre-planning to keep in mind for a client appreciation event:

1. Create a checklist

Write out a detailed list of everything that has to be done for the event.

For an effective and organized checklist, says Garibaldi, write out all of the activities in a timeline format. For example, mark down everything that has to be done two months prior, one month, two weeks, three days before, the day of the event and then the day after.

Mark down everything — from phone calls that need to be made to finding and booking a venue for the event.

2. Hold the date

Make sure the event is well attended by sending out invites in a timely manner and asking people to "hold the date."

Call clients the day you mail out the invitations, says Garibaldi. Let them know that they can expect to receive an invitation for the event in the next few days. Tell clients that you hope to see them there and encourage them to bring a guest.

Send out the invitation about three to four weeks before the event, she says.

3. Send an email

Make sure you get an answer from clients.

If you haven't heard from clients one to two weeks after the invitations were sent, says Garibaldi, email them a scanned copy of the invite.

"Sometimes, when an invitation comes in, somebody opens it up, throws it to one side and your client may not even end up seeing the invitation," she says. "That's why it's nice to send an email version of the invitation."

If your clients aren't fans of email, call them again to make sure they received the invite. Don't forget to remind clients to bring a guest.

4. Call to remind guests

Give your guests one last reminder before the event.

Call your expected guests two or three days before the event, says Garibaldi, to remind them of the date and to ask if they have any questions. Always make the calls personally.

"This particular communication touch point really demonstrates to your clients a personal attention," she says. "It really leaves a favourable impression of you with clients because you've taken the time to make these calls."

5. Write out names

Make things easier for guests by having nametags prepared in advance.

Having nametags for guests is important, says Garibaldi. Even if it's a small group, not everyone will know each other and it relieves the pressure of having to remember names.

Printing out badges in advance, she adds, will also save a team member from scrambling to write them out as guests arrive.