

LOCAL EVENT **PLANNING GUIDE**

DATE & TIME: _____

LOCATION: _____

CONTACT PHONE: _____

CONTACT EMAIL: _____

Goals
<ul style="list-style-type: none">• Cultivate meaningful connections with members of your community• Establish yourself as a trusted authority and resource of knowledge within your spheres

EVENT PREPARATION

Planning your next local event is easy when you prepare ahead of time and cover all the important W's: who, what, where, when & why.

Why: make sure your reason for hosting an event and your goals are clear. In addition to lead generation, think about the specific connections you hope to meet. Set SMART goals around meeting new people at your event and hold yourself accountable to it.

My SMART goals for the event are:

What: ask yourself, what type of event would your target attendee appreciate? For example, if you focus on young first-time home buyers, maybe a tasting or happy hour at a local craft brewery. Connect what they'd like with local businesses or service providers that you can tap into.

My target attendee's ideal event would be:

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EVENT PREPARATION, CONT'D

Where & When: once you have your WHAT covered, determining the location and time of your event will come naturally – again, if you’re partnering with a restaurant or bar, they will probably provide space, etc.

The location of my event will be:

The date and time of my location will be:

Who: be intentional with your invites. We don’t recommend just blasting your entire email list. Consider the specific demographic of your target attendee and what your SMART goals are for making connections for this event.

After the event is over, jot down some notes below about your specific ideas for following up with that particular attendee. Keep in mind how well and where they know of you for further context.

PRO TIP: Include a mix of past clients and leads and potential clients – that way, happy clients can help sell you!

Attendee Name	Email	Follow Up Notes
[1]		
[2]		
[3]		
[4]		
[5]		
[6]		

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EVENT PREPARATION, CONT'D

Use the space below to capture important attendee information and follow up notes.

Attendee Name	Email	Follow Up Notes
[7]		
[8]		
[9]		
[10]		
[11]		
[12]		
[13]		
[14]		
[15]		
[16]		
[17]		
[18]		

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CRAFTING YOUR ELEVATOR PITCH

When hosting your event and making new connections, you want to be able to jump right in when you introduce yourself to people and let them know who you are, what you do, and how you can potentially help them (or their friends!) in the future.

There are four basic elements of a networking elevator pitch. Use the space below to craft your pitch to practice and refine ahead of your event.

Part 1: Identify yourself.

Part 2: Explain what you do concisely.

Part 3: Explain what you want.

Part 4: Tell them what you want them to do (your "call to action.")
