

# ELEVATE *events* Playbook

*Event planning guide*



**ONEAMERICA®**

*OneAmerica® is the marketing name for the companies of OneAmerica*  
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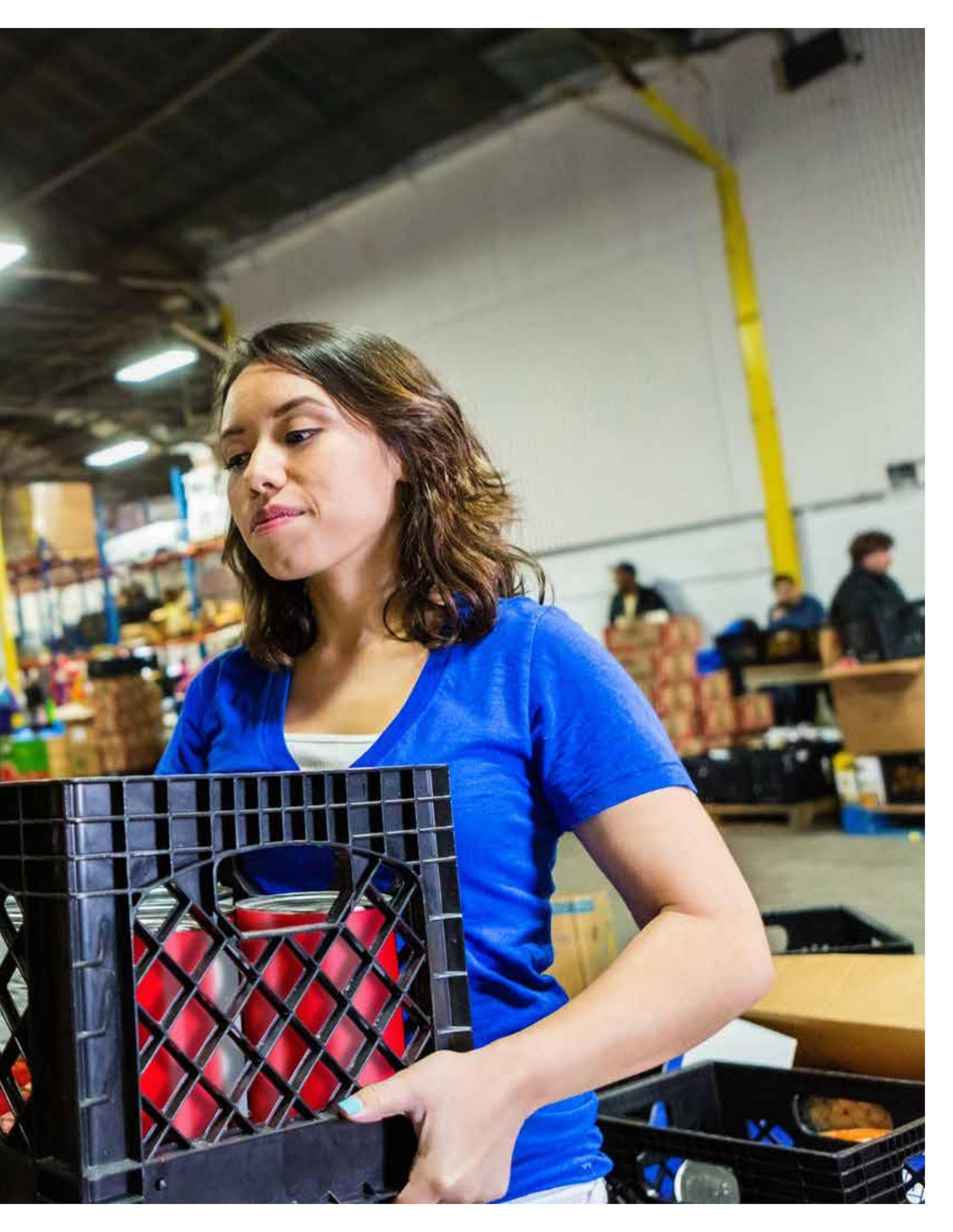


Take advantage of OneAmerica  
ELEVATE*events* marketing tools  
to help you support community  
needs and strategically position  
your business as a financial  
services leader.



ELEVATE*events*





# Grow your business

## *Community and educational event resources*

You can host ELEVATE *events* to attract and educate clients or to provide charitable services. To help ensure a successful event, carefully plan and execute the steps outlined in this guide and take advantage of the approved resources to simplify the process.

## Event types

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### **Community events**

*Connect with community to build goodwill and lasting relationships*

Hosting charitable events provides needed services to communities, builds goodwill for your agency, creates opportunities to connect with individuals and families, and develops networks. You can host an event related to the following and more:

- Child identification
- Food/meals
- Pets/animals
- Global health

### **Educational and promotional events**

*Connect with consumers to create and build lasting relationships*

Hosting agency events creates opportunities to interact with consumers so you can provide needed education, establish thought leadership and demonstrate your services, resulting in new and enduring client relationships. Events can include:

- Seminars and workshops
- Office open houses
- Recruiting open houses
- Special events

## Before you begin

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### **Start with your biggest attraction**

As you select a date and begin planning, focus on the most important feature of your event. If your highlight is the speaker, work first from his or her schedule. If it's a special location, start with dates the space is available. You'll save time with this approach and may avoid having to switch reservations, find new venues and make other changes.

### **Attendance is everything**

Strong attendance is critical to your event's success. Getting guests to register and attend tends to be the biggest challenge, so focus on the invitation and registration processes. For community events, execute strong promotions to publicize your event. Make sure you have a solid strategy to reach your attendance goals.

### **Collaboration helps**

Consider working with other professionals or organizations related to financial services or long term care when hosting education events, or entities that meet needs similar to needs you're addressing. They may be able to provide or recommend speakers, event venues, additional invitees and attendees, more public relations and marketing exposure, extra budget dollars and other resources. Check your centers of influence and identify possible event collaborators.

**Be a relentless, dedicated planner**

Complete tasks on time to keep the process moving smoothly. If a dependent task isn't completed on time, subsequent tasks may be delayed. Details are important, especially when logistics are involved. Plan your work, and work your plan!

**Assign a leader**

Your event requires time and focus. Your most effective strategy is to assign a dedicated team leader in your office. The event leader doesn't have to do all the work; he or she simply must know what has to be done and ensure all tasks are completed on time.

Access *ELEVATEevents* resources at OneSource Online.

## Key *ELEVATEevents* assets

Planning checklist

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Invitation language

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Email invitation

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Reminders

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Registration tools

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Registration page content

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Press release

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Social media campaign

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Thank you message

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Banner artwork

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T-shirt artwork

# Ten steps for a successful event

## 1 Determine goals

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What are your goals for your event? Your purpose drives the type of event you'll host. If you want to generate leads for life insurance policies targeting younger families, for example, a child identification program might be a wise choice. If, however, you desire to attract mature consumers with urgent needs for asset-based long-term care, an educational seminar could be more effective. In some cases, you may just want to contribute to your community by providing charitable services. Keep your goals in mind when planning and deciding on the type of event you'll host. Event goals can include:

- Increase awareness of your business
- Generate leads / attract potential clients
- Educate existing clients
- Spread goodwill / provide a community service

You also should set target numbers for attendees, prospective clients, appointments established, etc. Use your typical response rates to guide your plans. If you have a track record of getting three quality appointments and one successful new client from every 10 prospects, for example, you might target 30 attendees for an event to result in three new clients for your agency.

## 2 Choose the date and location

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Plan well in advance to secure the location and schedule speakers. We recommend following the timeline included with the checklist.

### Location and time

Your location and time can help increase or discourage participation. Make both as convenient as possible for your guests

- Be sure your location is easy to find and access.
- Choose a time that aligns with peoples' busy schedules (e.g., schedule a breakfast event so guests can get to work by midmorning, or host it during lunch hours).
- Select a central location so attendees don't have to drive far or struggle to find parking.

### Days to avoid

Some days typically don't work well for events:

- Mondays and Fridays
- National holidays
- Election days
- Religious holidays
- Dates that conflict with major community events

Think about these questions as you determine your event location:

- Is the facility large enough to accommodate the required number of tables?
- Is there adequate space to provide charitable services if hosting a community event?
- Will it be easy to serve food, if that's part of your plan?
- Are the conditions comfortable for your guests?
- Are restrooms easy for everyone to access?
- Is there plenty of parking?

Some locations, such as hotel conference rooms, may require you to do more marketing to attract guests than a themed venue. Consider these ideas for facilities:

- Well-known restaurant
- Popular resort
- Museum
- Hotel center
- Public library
- Religious venue

## Speakers

If you need outside speakers to support your event, determine their availability before you set your date and time.

### *Additional factors to consider when selecting speakers:*

- Your budget and the participation/success level required to cover your costs
- The facility's noise and privacy level
- Room or venue capacity
- Room or venue layout (e.g., ample space for seating, equipment)
- Commute time, traffic, parking and visibility
- Amenities provided or allowed by the facility:
  - Projector
  - Audio
  - Computer
  - Tables and chairs (i.e., so attendees may take notes)
  - Refreshments or other food and beverages

# 3 Select speakers or community collaborators

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## Speakers

If you're hosting an educational event featuring a presentation, recruit at least one dynamic, compelling speaker who is well educated in financial services. Your OneAmerica sales leader may have the insight and experience to fill this role. For additional speakers, consider individuals who aren't necessarily financial services experts, but have relevant experiences to share. An individual who is passionate about the subject matter can come from a variety of sources. He or she may be willing to speak for free or collaborate with you to help increase attendance.

### *Sources for skilled speakers:*

- Financial professionals from your organization and others
- Professionals from centers of influence
  - Attorneys
  - CPAs
  - Nursing home/LTC facility professionals
  - Social workers and other LTC-related professionals
- Clients
- College professors
- Local celebrities or well-known individuals with stories to tell

### **Community collaborators and volunteers**

Depending on the type of community event, you may need one or more community collaborators to be the recipient of your efforts or to help successfully execute the event. For a child identification event, for example, you may want to join efforts with a local police department. OneAmerica Marketing has established relationships with some organizations to make it easier for you. If you host a food packing or child identification event, for example, you'll need to connect with a designated organization and OneAmerica Marketing will provide you the right contacts.

### *Sources for community collaborators:*

- Not-for-profit organizations or local businesses
- Schools
- Religious organizations
- Local colleges and their organizations

### *Volunteers:*

Be sure you're adequately staffed for the event, especially if it's a community event that requires significant coordination. Having a good volunteer team makes the event leader's job much easier, too. The type, size and scope of your event will determine how many volunteers you need.

# 4 Invite guests

To meet your goals, you need to achieve strong attendance. When you consider that the average response rate for direct mail is 3.7 percent with a “warm” list and only 1 percent with a “cold” prospect list, you clearly need an effective strategy to attract guests. Whether you plan an event targeting 20 to 30 attendees, or you strive for a larger event with 50 guests, understand that you’ll need to spend time sending personal emails and calling guests to encourage their attendance.

A multi-channel marketing approach should include a combination of these tactics:

- Referrals and sharing
- Direct-mail invitations
- Email invitations
- Social media campaigns
- Print advertising
- Telephone calls

## Develop a list

When developing your contact list, remember that a key to strong attendance is networking. “Warm” leads are more likely to attend than “cold” leads, so connect with as many possible centers of influence, friends and colleagues and ask them to share your event on social media, make phone calls, send emails and mention the event in face-to-face meetings.

## Centers of influence

- Attorneys
- CPAs
- Nursing home/LTC facility professionals
- Social workers and other LTC-related professionals

For centers of influence for community events, see the list of potential collaborators earlier in this document.

## Send invitations

You’ll want to send your invitation multiple times (adhering to SPAM laws if you use email). Here is a sample schedule of when to connect with potential attendees:

### Sample communication plan

	Communication	Timing
<b>Contact 1</b>	Initial invitation	6 weeks before the event
<b>Contact 2</b>	Second invitation to nonrespondents	4 weeks before the event
<b>Contact 3</b>	Phone calls to warmest leads	3 weeks before the event
<b>Contact 4</b>	Reminder to respondents	1 week before the event
<b>Contact 5</b>	Know Before You Go to respondents	2 days before the event
<b>Contact 6</b>	Thank you to participants	2 days after the event

## Eventbrite®

We recommend using Eventbrite to facilitate registration electronically. With Eventbrite, you can establish registration pages, capture and export registration data, and send invitations, confirmations and reminders. It is free for organizations hosting free events. For paid admission, Eventbrite charges a small fee.

Information is provided on OneSource Online to help you use Eventbrite. Find step-by-step instructions at [www.eventbrite.com/support](http://www.eventbrite.com/support).

## 5 Promote event

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### Social media

Included with our ELEVATE*events* resources are instructions and assets for launching a social media campaign, complete with images, language and a recommended schedule.

### Press Release

If you're hosting a community event, it will be especially important to distribute a press release to local media. A press release is also provided.

### Web ad

To submit a web ad, send the JPG file to the media vendor with a link to your event registration page.

### Resources and tools

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OneAmerica marketing provides these tools you can customize to promote your event:

- Press release
- Email invitations, registration and confirmations through **www.eventbrite.com**
- Print invitation language
- Social media memes and campaign language

Your circles of influence can spread the word about your event and help boost attendance. Use the Request Social Sharing content in event resources to ask your network to share the event.

## 6 Make it special

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Although a speaker is typically your main attraction, you can add features to make your event special, memorable and effective. Here are some popular event features:

- Promotional items with the OneAmerica logo or your organization logo
- Door prizes
- Event themes and decorations
- Smooth flow of agenda items
- Welcoming, hospitable hosts
- Friendly atmosphere

## 7 Monitor registration

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To help ensure strong attendance, closely monitor registrations. If you find your numbers aren't close to your goals, you'll have time to make adjustments. You may need to invite more people, run another print ad, make more phone calls, ask your network to keep spreading the word about your event or employ other efforts to boost participation.

During this time frame, keep in touch with those who have registered. Send reminders through Eventbrite® a few weeks beforehand to keep the event top of mind.

### Invitations and registration

Use Eventbrite® to capture registration information. Use this no-cost, simple online software to send a confirmation and reminders. You also have the option to export registration information to a spreadsheet.

## 8 Handle the details

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Your event's success depends heavily on how well you handle the details. The checklist can help you think about factors you might not otherwise. Carefully follow the checklist and think ahead about tasks to add. A good exercise is to put yourself in the attendee's shoes and walk through the event, from arriving to eating to listening to presenters. Then walk through from the host's perspective, thinking how the agenda will flow, who will prompt speakers to begin, whether all audio-visual needs are in place and more. These steps increase the likelihood of a well-organized, well-run event.

### Resources and tools

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Event-day resources include:

- PowerPoint presentation
- Name badges
- Table tent cards
- Sign-in sheets
- Survey
- Follow-up card

## 9 Follow up

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Following up after the event is a critical part of meeting your goals. Two days afterward is a good time to begin reaching out to guests, while the event, your organization and the connections made are fresh. It's likewise important to keep in touch periodically afterward, using the nurturing strategies that work for your organization.

When you provide brief printed surveys at your event and ask attendees to complete them, you can later thank them for attending and determine their interest level.

- Contact all attendees afterward by email, phone, social media or mail (i.e., by sending the thank you message and/or other approved collateral).
- Thank each guest for attending.
- Invite guests to learn about the services you provide or your career opportunities.

## 10 Track and report

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A final step of the event process is to assess effectiveness. While details can be easily recalled, make notes about what went well and what you can improve. Save your notes and participant feedback and use this information to help plan future events.

**Within one week of your event**, complete the event summary online. (A link is included with the event resources.) The form requests event details, including:

- Event marketing
- Attendance
- Budget
- Purpose

Within a few months of your event, OneAmerica will email you a brief final survey to capture your results since your event.

**Have questions? Contact us  
at [marketingservices.ind@  
oneamerica.com](mailto:marketingservices.ind@oneamerica.com).**

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### **About OneAmerica®**

A national leader in the insurance and financial services marketplace for 140 years, the companies of OneAmerica help customers build and protect their financial futures.

OneAmerica offers a variety of products and services to serve the financial needs of their policyholders and customers. These products include retirement plan products and recordkeeping services, individual life insurance, annuities, asset-based long-term care solutions and employee benefit plan products.

Products are issued and underwritten by the companies of OneAmerica and distributed through a nationwide network of employees, agents, brokers and other sources that are committed to providing value to our customers.

To learn more about our products, services and the companies of OneAmerica, visit **[OneAmerica.com/companies](http://OneAmerica.com/companies)**.