** **

**Annual Holiday Promotion Timeline & Checklist**

**Event Planning to Maintain Connection with your Top 50, Past Clients, Prospects, Referral Partners, & SOI**

**With added Community Benefit**

**Start DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Event Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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|  | **Action** | **Date Due** | **STATUS/Completion** |
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|  | Identify your date for the Annual Client Open House Event & Food Bank Drive/Charity- Choose a date you think will work – Friday late afternoon into about 7:00 at night? Saturday afternoon? Sunday afternoon? | 30-45 Days out |  |
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|  | Call your Top 50 and SOI/ Past Clients using the FORD Script/Apology Script and tell them to keep Save the Date and keep an eye out for the evite/invitation for your Client Appreciation Open House Event | Target at least 5 a day  |  |
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|  | Identify location for your Client Holiday Open House  | Choose easy location Chamber? Park? Office? Realtor Office? Lender office? Order permits if required  |  |
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|  | Confirm with office the availability for the event | Don’t surprise your manager☺ |  |
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|  | For your direct mail:Set up target list of invitees - include Top 50, past clients, prospective buyers, sellers, and strategic partners you have worked with - consider also inviting those vendors in your town that you do business with to stop in that date |  |  |
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|  | Consider sponsorships with your ***lender partners(s)*** *and/*or co-sponsorships from local stores and vendors: i.e. restaurants, manicure salons, wine store, - plenty of exposure for them for no work – and low cost to get in front of your SOI-Cash works or donations of their services/products  | They can donate an item or make a cash donation to the event – think ahead about how much - $100- $50? Or more – any leftovers go to the Food bank on their behalf  | Think strategic partnering: |
|  | Decide on what to serve: Hot Cider for kids - cookies, cheese/crackers – Bushel of apples? Not sure if you can offer wine so check local ordinances, etc. Option: May even be able to set up a wine tasting sponsored by local wine store if it is appropriate – etc. and wine sponsor has interest around holidays  |  | Food Leftovers donated to church food pantry or homeless shelter  |
|  |  |  |  |
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|  | Check **Big Bo**x stores or **local apple farm** for cider purchase, leverage your promotion idea with the food bank slant to get a better or discounted price☺ – Video/Photo for FB if they agree – Idea: Promote and buy LOCAL if/when possible – leverage community contributions and spirit of giving  |  |  |
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|  | Food Bank Posters – If the Food bank has posters, visit local vendors in your town with permission to post on their premises with your TEAM LOGO, PHOTOS & Contact info on each poster with the dates of the event, time, location etc. |  | If the Food Bank does not supply boxes for food donations, do have sturdy boxes on premises for loading the food contributions for the pickup – pickup free boxes at local stores and wine stores – |
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|  | Think about offering a drawing – Maybe putting together an apple basket give away – to get names and contact info in a drawingOr contacting your local restaurants for a gift certificate for 2 (on one of their off days – not holidays when they are already busy) – Promote on FB and in your flyer, e-blasts, …evites, etc. – BRAND the Restaurant as a sponsor Ideas: * Dinner for 2 or lunch at a local restaurant (contact restaurant owner for a 2 for 1 gift certificate or for a freebie) –
* Manicure/Pedicure
* Wine of the Month
* Bike for a Kid
* iPad Giveaway
* Apple Basket of Goodies
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|  | Design an invitation flyer to your farm area and/or invite and get an RSVP for sure for an idea of how many may come- You can insert into your monthly Neighborhood update -  |  |  |
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|  | Post the event on your Biz Facebook page Push the TEAM brand big-- before Company brand- RSVP Link using Evite for easy count NOTE: Set up reminder the day before and the day of using e-vite options or Auto Responders- or even better – a VIDEO Eblast using Bomb-Bomb as a Video reminder would be terrific!  |  |  |
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|  | Contact the local Radio Station and local newspaper about the food drive for a free Public Address or quick interview with your team on how the community can help and how your team is spearheading the event with your own SOI  |  |  |
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|  | Send out the invite using all or some of these channels: direct mail or email E-VITE, FB Evite to your SOI to attend and bring non-perishable food items to your Open House  |  |  |
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|  | Hire a student or staff/friend to take photos/video and do Facebook Live Streaming at the event for Facebook posting -(careful with kid pics on Facebook – get permission since it is a biz page  |  |  |
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|  | Post short videos on your new YouTube Team Channel * Announce the event
* Mention DRAWINGS if any
* Talk about the FOOD BANK
* Show progress as food donations come in prior to the event
* Take photos of the event launch - footage of people coming in and dropping food –
* U Facebook LIVE without necessarily showing faces - but the energy of the event- shot of the hot cider if it's cold out - shot of the big cookie display - bushel of apples - etc. –
* Have your lender featured as a co-sponsor – then they can participate and can share proportional expenses –They then can "meet" your SOI for high touch personal branding
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|  | Arrange for a drawing spotlight at a specific time at the event for:* Registration form must include their cell phone number for texting and email so you have an easy update - pictures of the dinner winners - FB post- Video, etc. - Restauranteurs are HAPPY to contribute - they get GREAT exposure- for a SLOW night like Tuesdays
 | Have a box or bushel with pens and short concise registration forms  |  |
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|  | **AFTER THE EVENT** |  |  |
|  | Send thank you notes to each attendee on your branded note paper featuring the TEAM HAM logo, etc - Post on your thanks to all on FACEBOOK With special thanks to your sponsors Make it an annual event!  |  |  |

**Budgetary and line items needed:**

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| **ITEMS** | **Actions** | **Notes**  |
| **Flyers/Postcards** | Combine with monthly farm flyer for farm area – direct mail to top 50 and top influencers, past clients |  |
| **Postage, paper, printing**  |  |  |
| **Apple Cider** | Costco: $10 for 2 gallons – to $45.00  | All leftovers to local homeless shelter or churches  |
| **Cookies**  | Costco  | All leftovers to local homeless shelter  |
| **Crackers** | Costco  | ditto |
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| **Cheese Spreads**  | Costco  |  |
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| **Plastic Garbage Bags & Boxes for disposal**  | Big tall boxes lined with large plastic bags make clean up easy and simple  | For easy clean up  |
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| **Cups/Napkins/Decorations**  | Dollar TREE - -everything is a dollar!  |  |
| **Cardboard Boxes for Food Donations**  | Ask Stores for boxes or contact the Food bank for their preference  |  |
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| **Photographer** | Hire a kid or a student – no big $$ here  | Setup access to photos if the attendees want to share the photos on FB  |
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| **Drawing** | Apple Basket, wine? Restaurant Gift Certificates?Free Breakfast for 2 – Free HVAC Fall Tune Up?Free HaircutComplimentary Manicure/Pedicure?Bike for kids?  | CONTACT LOCAL VENDORS and ASK to help draw community to help community -  |
| **STAFF** | Helpers dressed like Santa helpers might be fun to help kids |  |
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| **Signage & Balloons** | Use your Feather OPEN HOUSE signs the day/time of the event for high visibility – \*Get helium balloons for kid giveaways and to have outside the event door  | You can get helium for onsite balloon for not much $$ at Costco or Party Store if you want to offer balloons for kids  |
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| **Other** | Have a collection box for money/change donations for the Food Bank if the attendee forgot to bring food donations  |  |
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| **MUSIC** | Spotify, your iPad music- holiday theme?  |  |
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| **FUN FACTOR** | Have fun! Be available to take pics with your guests  |  |