**Educational Workshop Task List**

Booking Colleges

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date Completed** | **Days Prior** | **Task** | **Details (Who, What, When, Where, Why, How)** | **Assigned to** |
|  | - 42 | Identify several colleges in your area that you would like to target   1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 6. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 7. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 8. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 9. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 10. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 11. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 12. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Keep in mind that if you want to do two classes per week at one location you will need up to 12 locations depending on the number of workshops you would like to run.  If you are just starting out, steps 2-5 will need to be taken with each college/university you bring on.  Once you have identified a rotation - do not do the same location more than once a quarter - You can simply do step 5.  It is important that you schedule these out 6 months in advance, so you get the ideal timing and locations for your workshops. |  |
|  | - 42 | Call the universities to inquire about renting space | Go to the schools website and search for Campus Facilities Use in the search bar. Once you have identified your contact give them a call and ask to rent classroom space for your “Retirement and Charitable Giving” course. Here are some ideas on the titles you will look for:   * Director, University Center * Associate Director for Campus Life– Event Management | * Scheduling Coordinator * Facilities Director * Events Coordinator * Assistant Director |  |
|  | - 35 | Tour the space to make sure it meets all of your needs | * Classroom needs to have a projector & screen. * Request classroom nearest an entrance. * Make sure the room will comfortably fit 15-20 people * Be sure to ask about parking as some universities charge for parking. |  |
|  | - 35 | Sign a contract with the school for said space | Read the contract very carefully to ensure that you don’t misuse the school’s logo or misrepresent your relationship with the school. |  |

Sending Mailers/Receiving Reservations

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| **Date Completed** | **Days Prior** | **Task** | **Details (Who, What, When, Where, Why, How)** | **Assigned to** |
|  | - 35 | Contact our Marketing Representative to introduce, go over demographics and budget | Chase Hebeler  **Power Mailers Direct, LLC**  **711 S. Howard Avenue**| **Suite 200**| **Tampa, FL 33606**  **Direct:** 813.453.1969 **Fax:**813.304.2460 **E-mail:**[chase@powermailersdirect.com](mailto:chase@powermailersdirect.com)  **Website:** [www.powermailers.com](http://www.powermailers.com/) |  |
|  | - 28 | Drop mailers for educational workshops 3-4 weeks in advance | Chase Hebeler to direct |  |
|  | - 28 | Chase will set you up with Teledirect for your reservations | Chase Hebeler will direct |  |

Pre-Workshop Checklist

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| **Completed** | **Days Prior** | **Task** | **Details (Who, What, When, Where, Why, How)** | **Assigned to** |
|  | - 21 | (First Time only)  Prepare materials for class:   * Instructor Bio/Handout * Disclosure page for school venue * Create map to your office * Order 1” binders * Order Business card magnets * Order Branded Pens | Downloadable EW materials available on the BHFM training website at [https://www.bhfm-fmo.com](https://www.bhfm-fmo.com/topic/1-08-how-to-set-up-retirement-101-class/)  Step 1: Click on Educational Workshop and Operations  Step 2: Resources Available to Download  Step 3: Workshop Downloads.  Here you will find the templates you can change to suit your office.  We purchase binders through an office supply store such as Office Depot.  The business card magnets along with the branded pens we purchase through 4imprint.  <https://www.4imprint.com/> |  |
|  | - 21 | (First time only)  Purchase or secure the following items   * Wheel cart (needs to carry all the below items - plus binders) * Laser pointer * Thumb drive with EW powerpoint * Branded pens * Dry erase markers * Clock * Batteries * Extra computer cables * Powerstrip and extension cord | We purchased our wheel cart from Home Depot. It is a Dewalt Tough Chest 38 in. 63 Gal. Mobile Tool Box priced at $79.00. |  |
|  | - 14 | Ensure you have enough materials for Binders   * 1” binders * Business card magnets * Business cards |  |  |
|  | - 1 | Check Teledirect website for your reservation list | Teledirect website. Chase will direct |  |
|  | - 1 | Create EW spreadsheet | Downloadable spreadsheet available on the BHFM Training Website:  [https://www.bhfm-fmo.com](https://www.bhfm-fmo.com/topic/1-08-how-to-set-up-retirement-101-class/)  Step 1: Click on Educational Workshop and Operations  Step 2: Resources Available to Download  Step 3: Workshop Downloads.  Here you will find the spreadsheet labeled EW Spreadsheet to enter in attendees names, addresses, phone and email addresses |  |
|  | -2 | Email all registrants two days before a class to confirm their attendance. Attach a video from the Instructor. | The email template to use will be found on the training website:  [https://www.bhfm-fmo.com](https://www.bhfm-fmo.com/topic/1-08-how-to-set-up-retirement-101-class/)   * Educational Workshop and Operations * Workshop Downloads * Appointment Process Videos |  |
|  | - 1 | Call all registrants the day before a class to confirm their attendance | Ask if they’re bringing a guest, and if they have any questions about the location (this is also the time to tell them about any parking passes, where to park, etc.) You will find verbiage templates on the training website:  [https://www.bhfm-fmo.com](https://www.bhfm-fmo.com/topic/1-08-how-to-set-up-retirement-101-class/)   * Educational Workshop and Operations * Workshop Downloads * Appointment Process Videos | Receptionist |
|  | - 1 | Prepare all class binders  All templates may be downloaded from the BHFM training website along with photos of binder prep.  Templates are found:  [https://www.bhfm-fmo.com](https://www.bhfm-fmo.com/topic/1-08-how-to-set-up-retirement-101-class/)   * Educational Workshop and Operations * Workshop Downloads | * Title sheet * Bio of the Instructor * Printout of EW powerpoint presentation * Disclosure page for school venue * Workshop Evaluation sheet * Map to our Office * Advisor’s business card * business card magnet * (4) notes pages * Packet of articles |  |
|  | - 1 | Prepare First Appointment Packets for EW.  The assistant to the Instructor will staple these forms and fill out after class if the attendee/s schedule an appointment. | First Appointment Packets consist of:   * First Appointment Information Form * Analysis Form * Map to your office.   You will find these downloadable documents on the BHFM training website  [https://www.bhfm-fmo.com](https://www.bhfm-fmo.com/topic/1-08-how-to-set-up-retirement-101-class/) |  |
|  | - 1 | Gather all supplies for EW in your Workshop Bin | Bin to take to each EW must consist of   * laser pointer * thumb drive with EW powerpoint * class binders * pens * dry erase markers * clock * business cards * batteries * extra computer cables * powerstrip and extension cord |  |

**Day of Educational Workshop Checklist**

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| **Complete Y/N** | **Task** | **Details (Who, What, When, Where, Why, How)** | **Assigned to** |
|  | Check Teledirect website for additional registrations | Call the ones you were not able to contact for confirmation the previous day. |  |
|  | There should be 1 staff member present for every 4 buying units that are confirmed (Does not include Instructor) |  |  |
|  | Check the bin that is to be taken to the EW | Make sure all of the supplies are stocked. |  |
|  | Arrive to the school 1.5 hours prior to EW |  |  |
|  | Set the Instructors computer and have powerpoint presentation ready to go | Instructions are located on our BHFM training website: [https://www.bhfm-fmo.com](https://www.bhfm-fmo.com/topic/1-08-how-to-set-up-retirement-101-class/)   * Educational Workshop and Operations * Workshop Downloads * FTA-Workshop-How-To-Set Up-for-class\_1\_ |  |
|  | Lay out the EW workbooks with a pen at each seat | Keep the attendees at the front of the room. |  |
|  | Have the Registration list out along with a seating diagram which you can make up by hand once arriving to the school to check in attendees | Check attendees in and fill in the seating chart legibly so that the Instructor can call out each attendee by name |  |
|  | At the end of each class you will have an opportunity to book appointments | **Instructor:** Instructor is to mingle and speak to the attendees while they are waiting to hand in their evaluation forms and schedule their appointments so that no one slips out.  **ParaPlanner/Assistant:**  Step 1: Have the First Appointment Packets stapled and ready  Step 2: Have the calendar pulled up on your laptop  When attendee approaches ask them “are you ready to schedule an appointment to finish the class” as you are receiving their evaluation. If there is hesitation let them know that the Instructors calendar fills up quickly and that they’ve come this far! Let’s cross the finish line.”  If you receive a rejection ask if it is ok if the Instructor follows up with them and thank them for attending. |  |

**The Day After Educational Workshop**

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| --- | --- | --- | --- | --- |
| **Date Completed** | **Days Prior** | **Task** | **Details (Who, What, When, Where, Why, How)** | **Assigned to** |
|  | + 1 | Call Attendees who did not set appointments | The Instructor is to follow up with each attendee that DID NOT schedule an appointment the morning after the EW | Instructor |
|  | + 1 | Call No Shows and invite in-person meeting or future event | For anyone that expressed interest, but did not book an appointment, there will need to be follow up contact made | Instructor |
|  | + 2 | Call Non appointment setters and No shows you did not personally talk to |  | Instructor |
|  | + 3 | Send email to Non appointment setters and No shows you did not personally talk to |  | Instructor |
|  | + 4 | Call Non appointment setters and No shows you did not personally talk to |  | Instructor |
|  | + 7 | Call Non appointment setters and No shows you did not personally talk to |  | Instructor |
|  | + 8 | Add Non appointment setters and No shows you did not personally talk to, to your drip |  | Instructor |
|  | +8 | Review the EW spreadsheet from previous class, retrieve Instructors notes to find out who has made appointments and fill in the Seminar Stat Spreadsheet. Each EW thereafter you will need to go back to the recent classes to check to see if appointments came in. | Instructions are located on our BHFM training website: [https://www.bhfm-fmo.com](https://www.bhfm-fmo.com/topic/1-08-how-to-set-up-retirement-101-class/)   * Educational Workshop and Operations * Assistant Training * Seminar Stat Spreadhseet (template) | Receptionist |