

- Engagement Calls & Confirmation Calls – 4:30 pm – 6:30pm
- Coordinate with venue in advance with Hostess or Manager
- Medicare Signage with logo & content
- Collect invite for quick check-in at the event
- Assign seating with like interests & demographics
- Print Roster for Assigned seating & highlight to check them in
- Arrive at least 1 hr prior to the event start time.
- Have someone assist you at the event for check-in & at the end to set appts and collect info sheets.
- Play background music as people arrive to make them feel comfortable while they get settled
- Announce the Agenda, make an intro and what time you will start eating.
- Short Q & A session offering to answer 3-4 questions.
- Keep your presentation to 30 minutes or as close as possible.
- Keep track of no-shows and walkups hand write on your roster with all information.
- Close your event. Announce it and then food will be served. Tell them you will be walking around collecting info sheets and booking appts.

Best Practices

Engagement calls:

- Need to be made by the Broker/Agent.
- Be excited when calling that they are attending your event.
- Personalize it as much as possible using first names of all guests.
- Talk only about the dinner event & how the event will go.
- Ask them to come 15 minutes early for check-in and get their seats.
- Remind them you will be calling them the day before the event to confirm their reservation.