

**ELEMENTS OF A SUCCESSFUL  
CLIENT APPRECIATION EVENT**

My goal is to help you give your guests a Broadway-quality event and a unique experience they will talk about for a long time... An event at which your guests to feel honored, special, and attended to... An event – and every “touch” associated with it – that reinforces the high quality and values of your firm.

One thing we know on Broadway is that planning and preparation are absolute “musts” for creating an extraordinary experience for the audience.

Drawing upon my experience at numerous client appreciation events, I have put together the following Event Toolkit with several best practices and templates designed to help you plan, prepare and execute an uplifting and memorable event for your valued clients and guests.




PLANNING TIMELINE

SAMPLE INVITATION COMPONENTS

EVENT TIMELINE

EVENT COMPONENTS

PLANNING TIMELINE

#	ACTIVITY	TIMELINE	TEMPLATE
<b>PRE-EVENT ADMINISTRATION</b>			
1	Select possible event dates, calculate projected attendance, identify possible event locations, set budget	-7 months	
2	Contact Sandra Joseph to check availability and book engagement	-7 months	Appearance Agreement
3	Event site inspections to determine date availability, A/V & logistics, food & beverage, parking, and costs	-6 months	A/V & Logistics Checklist
4	Select site, sign contract, confirm menu, beverages, A/V & logistical arrangements in writing	-6 months	
5	Book Sandra’s accommodations and ground transportation; Sandra books flight	-6 months	Appearance Agreement
6	Optional – hire/arrange music during cocktail reception	-5 months	
7	Prepare invitation list, option to prioritize “A & B” guests, with special offering for” A” guests	-5 months	

#	ACTIVITY	TIMELINE	TEMPLATE
<b>PRE-EVENT MARKETING</b>			
1	Create event theme/brand, design invitation, ticket request card, tickets, name badges	-4 months	Invitation kit samples
2	Print invitation materials, develop save-the-date letter and VIP call script	-3 months	Invitation letter sample
3	Distribute save-the-date letter and make VIP calls	-8 weeks	
4	Mail invitations and ticket request cards; develop ticket request follow-up procedures, develop cover letter to accompany tickets	-6 weeks	
5	Hire photographer, develop optional “photo wall”, plan procedures for photo-taking with Sandra and mailing photos to guests after the event; prepare follow-up letter to accompany photos post-event	-6 weeks	
6	Develop call script and phone VIPs with no response and confirm ticket requests	-3 weeks	
7	Contract social media person to create posts following event; develop press release in advance	-3 weeks	
8	Optional – Hire videographer to create event video to post on website	-3 weeks	See Conway video on website

<b>FINAL PREPARATIONS</b>			
1	Hotel confirmations – registration tables/procedures/staff; AV equipment and engineer; parking arrangements, food & beverage arrangements	-1 week	A/V & Logistics Checklist
2	Confirm photographer, photo wall	-1 week	
3	Pre-print follow-up letters to accompany photos mailed post-event	-1 week	
4	Phone conversation with Sandra re: final checklists	-1 week	
5	Confirmation calls to all attendees	-1 week	
6	Rehearse and fine-tune timeline for night of event	-1 week	

## 1. CONTENT FOR SAVE-THE-DATE LETTER AND VIP CALL SCRIPT



Dear Nancy and Jim:

How would you like to have the opportunity to meet a Broadway Legend and *Phantom of the Opera* star, Sandra Joseph?

I hope you will be able to join me Thursday evening, September 10th at the Edgewater Resort for a private performance and behind-the-curtain stories with this world-renowned *Phantom of the Opera* star who Oprah Winfrey called “One of Broadway’s biggest stars...an inspiration.” We’ll be sending a more formal invitation shortly, but I wanted you to save the date in the meantime.

When I first heard about Sandra I was most certainly impressed with her musical talent. However, I was even more taken by her story of how an extremely shy girl from Detroit became the leading lady in the longest running Broadway show in history. For almost 10 years, and over 1,300 performances, she starred as Christine Daae in *The Phantom of the Opera*.

Sandra has appeared on *The Oprah Winfrey Show*, *CNN*, *The Today Show*, *The View*, *Late Night with Conan O’Brien* and, on September 10th, you too will have the opportunity to see her performing songs from the most famous show in Broadway history. Also, her “behind-the-curtain” stories will entertain and inspire, and you will learn practical takeaways based on cutting-edge research, designed to help you play on a bigger stage ... both in life and in business.

I have organized this event as a “thank you” to my clients and have already reserved two tickets in your name. A number of individuals have already asked if they can invite friends or associates. Although we are somewhat limited in the number of tickets available, we will do all we can to accommodate your extra guests. Please call Betty Hanlon in our office to check on availability of extra tickets.

Watch your mail for your invitation, and I look forward to seeing you at what I’m sure will be an incredibly entertaining, inspiring, and informative evening.

Best regards,  
Todd Smith  
Managing Partner

2. SAMPLE CONTENT FOR INVITATION, RESPONSE CARD, AND TICKETS

  
 WEALTH ADVISORS

Invite you to a  
*“Peek Behind the Curtain”*  
 With our special guest, Sandra Joseph, Broadway singer, actress, author, and Broadway’s longest-running leading lady in The Phantom of the Opera. Sandra will join us for a private concert and evening of inspiring conversations that celebrate authenticity and encourage the pursuit of dreams.

*When*  
 Thursday, September 10, 2015  
 Cocktail Reception: 6:00 – 6:30 PM  
 Dinner, Private Concert, and Photos: 6:30 – 9:00 PM

*Where*  
 Edgewater Resort  
 Street, City State

*Resp*  
 Before September 1, 2015  
 Attire: Dressy casual

  
FINRA DISCLOSURE

RESPONSE CARD FOR “A” CLIENTS



Sandra Joseph played the highly coveted role of ingénue, Christine Daae on Broadway more than any other actress (nearly 1,500 performances). We’re thrilled to have her sing and talk about what it’s like to play such an iconic heroine, and how her stage career led to dreams fulfilled.

**Two Tickets to this one-of-a-kind “Behind the Curtain” event are reserved especially for you. Please respond before September 1, 2015.**

M \_\_\_\_\_

{ } Accept with pleasure  
 { } If time allows, I would like to be included in a photo with Sandra

RESPONSE CARD FOR “B” CLIENTS



Sandra Joseph played the highly coveted role of ingénue, Christine Daae on Broadway more than any other actress (nearly 1,500 performances). We’re thrilled to have her sing and talk about what it’s like to play such an iconic heroine, and how her stage career led to dreams fulfilled.

**Tickets to this one-of-a-kind “Behind the Curtain” event are very limited. Please respond before September 1, 2015.**

M \_\_\_\_\_

{ } Accept with pleasure  
 { } If time allows, I would like to be included in a photo with Sandra

2. SAMPLE CONTENT FOR INVITATION, RESPONSE CARD, AND TICKETS

EVENT TICKETS



NAME BADGES



## 3. APPEARANCE AGREEMENT



## APPEARANCE AGREEMENT

This agreement is made effective this [day of 2015], between Sandra Joseph of Rahhday Productions, Inc. (hereinafter referred to as "contractor" or "speaker") and [\_\_\_\_\_] (hereinafter referred to as "contractee").

Contractor hereby agrees to furnish the following:

- Interview and performance engagement on [\_\_\_\_\_]

1. Additional presentations requested of speaker (contractor) outside the terms of this agreement are subject to additional fees.

2. In consideration of the services described above, contractee agrees to pay to contractor an inclusive fee of \$ plus a flat rate of \$ to cover travel expenses, including flight, ground transportation (and/or car rental), meals, and baggage fees. Hotel accommodations for 1-2 night(s) including Wi-Fi and parking will be arranged for and provided by contractee. Please reserve Sandra a King non-smoking room for the night of your event in a hotel at or near the venue.

3. Payment in full in the amount of \$ plus \$ travel fee payable to Rahhday Productions, Inc. is due upon receipt of this contract to secure the date.

- Checks payable to: Rahhday Productions, Inc.
- Mail checks to: 103 Giordano Dr., West Orange, NJ 07052
- Tax Identification Number: 202674827

4. Audio or video taping of the Speaker's (contractor) program(s) is not permitted in any means whatsoever by contractee or any audience member, unless agreed upon after contractee makes the request to the Speaker in writing and receives written authorization from the Speaker.

5. In the event of an emergency situation that causes Sandra Joseph to cancel the scheduled engagement(s), 100% of the \$ payment and \$ travel fee will be reimbursed within three days of Sandra Joseph notifying contractee of the cancellation. If the contractee cancels the engagement(s), the contractee will forfeit 50% of the \$ payment and 100% of the \$ travel fee.

**Contractor: Sandra Joseph,  
Rahhday Productions, Inc.**

**Contractee: [\_\_\_\_\_]**

Sandra Joseph

Print Name

Signature and Date

Print Name and Title

Signature and Date - By signing this agreement, I acknowledge that I am permitted to authorize this agreement.

Please complete and mail this contract with payment and travel fee (payable to Rahhday Productions, Inc.) to: Rahhday Productions, Inc., 103 Giordano Drive, West Orange, NJ 07052

## 4. A/V & LOGISTICS CHECKLIST



### A/V AND LOGISTICS CHECKLISTS

#### AUDIO ENGINEER

Sandra's goal is to deliver a Broadway-quality presentation for your event. Since Sandra will be singing songs she performed on Broadway at your event, the importance of engaging an experienced professional audio engineer and utilizing high quality equipment cannot be overstated. A professional audio engineer must be made available to do a sound check before Sandra's presentation and must stay at the soundboard to mix levels throughout her entire performance.

#### AUDIO NEEDS:

- Professional sound system and mixer capable of accepting a minimum of two audio inputs
- 1 Handheld (not lavalier) wireless microphone (Shure SM58 preferred)
- 1 D.I. (Direct Input) and appropriate cabling for amplifying audio from laptop's 1/8" audio jack (Sandra plays music through "Keynote" on her Mac laptop)
- Audio (wedge) monitors placed downstage (1-3 depending on size of venue: one center, one left, one right)
- Speakers on stands provide far better sound quality for music than ceiling speakers

**VIDEO NEEDS:** (optional): Images add a nice touch but you may opt for audio-only if you wish.

- 1 or 2 projection screens (If using one screen center-stage, please be sure it is positioned high enough so that Sandra can walk in front of it without impairing the audience's view.)
- 1 video projector
- VGA cable-to-projector for laptop output (Sandra presents from a Mac using "Keynote" and provides her own VGA adapter and wireless remote.)

#### LOGISTICAL NEEDS

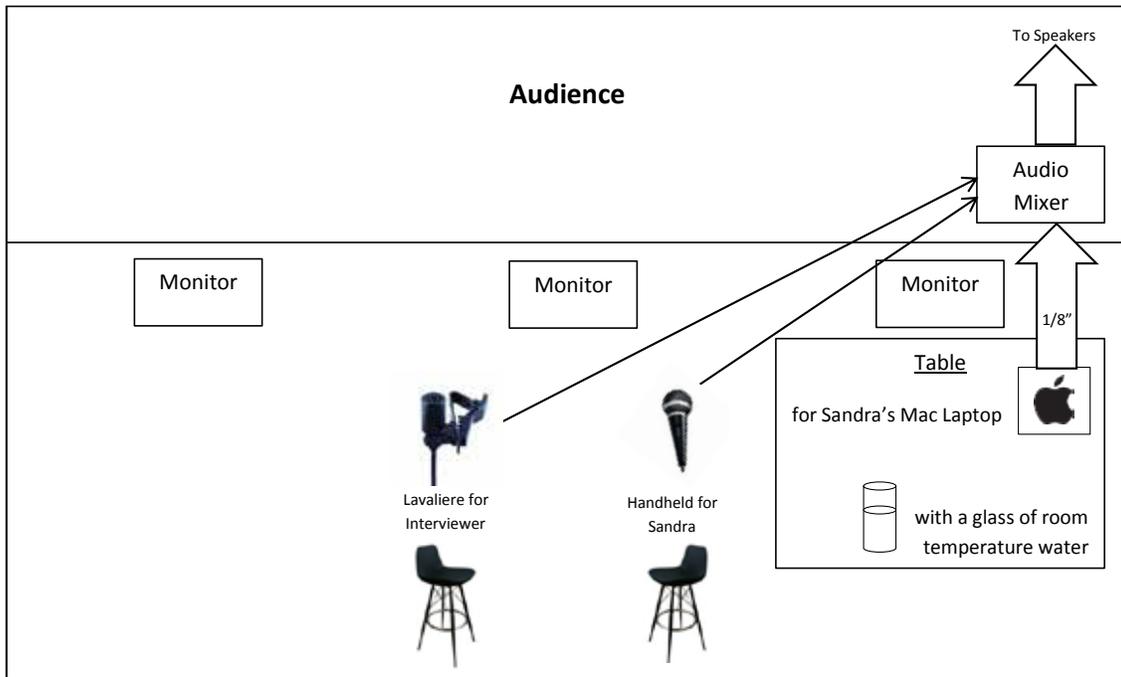
- Please place a small table on stage (front of stage to Sandra's right) for Sandra's Mac laptop and provide a glass or bottle of room temperature (no ice) water on the table before sound check. *(Optional: It will be more visually appealing if a bouquet of flowers is used to camouflage the laptop and water.)*
- If a podium is necessary for the event, please remove it from the stage or place it all the way to Sandra's left before her presentation begins.
- If Sandra will not be performing in a theater or theater-like setting, please provide a portable riser stage, preferable 8' x 12'. If there will be more than 200 attending, a riser that is at least 18 inches off the floor is recommended. For an audience of 350 or more, an amplified light package will greatly increase the impact of the performance. Two light stands and a spotlight are ideal.
- Please seat the audience as close to the stage as possible, but refrain from seating anyone on the stage. Sandra's performance space must be separate from any lectern/head table area.
- Sandra will need a 30-minute block of time with the audio engineer to do a sound check at least 90 minutes prior to the start of the program. Please schedule this sound check and be sure that all equipment is completely set up before Sandra arrives.
- Please provide a private "dressing" room with plenty of room temperature, filtered water where Sandra can change clothes and get ready for her performance after her sound check.

## 4. A/V & LOGISTICS CHECKLIST



### A/V AND LOGISTICS CHECKLISTS

**TECHNICAL DIAGRAM** *Video equipment not pictured:*



## EVENT TIMELINE

#	ACTIVITY	TIMELINE	TEMPLATE
<b>PRE-EVENT ADMINISTRATION</b>			
1	Set up registration table with name badges; Sandra does sound check with engineer; double check all logistics, including food/beverages, parking, reception music, stage props, etc.	-3 hours	A/V & Logistics Checklist
2	Have photographer (and videographer) set up equipment and photo wall	-2 hours	
3	Have greeters in place	-30 minutes	
4	Guests arrive and enjoy cocktail hour with passed appetizers	6:00–6:30 PM	
5	Guests are seated for dinner	6:30–7:45	
6	Master of Ceremonies welcomes guests and introduces Company President	7:45–7:48	
7	Company President introduces Sandra; Sandra comes on stage with President	7:48–7:50	Script for introducing Sandra
8	“Peek Behind the Curtain” – President interviews Sandra	7:50–8:15	Interview Questions
9	Sandra performs songs from The Phantom of the Opera	8:15–8:45	
10	President wraps up evening	8:45–8:50	
11	Photos with Sandra; optional Coffee and Dessert	8:50–9:30	

## 1. SAMPLE SCRIPT FOR INTRODUCING SANDRA



SAMPLE SCRIPT FOR INTRODUCING SANDRA

At Smith Jones Wealth Advisors, we help people pursue their dreams. Our guest tonight has successfully pursued her dream and we're excited for you to hear her inspiring story.

Sandra Joseph is a singer, actress, author, and keynote speaker who holds the distinction of being the longest-running leading lady in Broadway's longest running show. For 10 years and more than 1,500 performances she played the starring role of Christine DIE-yay in *The Phantom of the Opera*. Sandra is the co-author of *Your Creative Soul: Expressing Your Authentic Voice*. She has been seen on *The Oprah Winfrey Show*, *The Today Show*, *CNN*, *The View* and many others. Please give a warm welcome to **Sandra Joseph**.

## 2. SAMPLE QUESTIONS FOR INTERVIEW WITH SANDRA



### SAMPLE QUESTIONS FOR INTERVIEW WITH SANDRA

1. When did you first get the “bug” for singing and acting?
2. When did you start performing?
3. It’s not easy making it in the arts. Did you always know you were going to pursue theater professionally?
4. How did you get a part in Phantom?
5. What does it take to show up every night and give your best performance?
6. Did anything ever go wrong during the show?
7. Tell us what you’re doing these days.

(SEGUE INTO MUSICAL PERFORMANCE...)

Now you’re in for real treat. Sandra is going to sing for us . . . Are you ready?