

# Social Event Guidebook



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The purpose of this guidebook is to assist local and state chapters in hosting successful social events. NAHU prides itself on bringing people together. One of the most effective ways to bring people together is to host social events that allow members and non-members to meet in a more casual setting. Health insurance professionals are inundated with connection requests from new people wanting to sell their products and/or services. Although there is a time and a place for those meetings, social events can be the forum where sales-driven intentions are checked at the door, and attendees can become familiar with the person behind the business card. This set of recommendations was aggregated based on the recommendations of various Vanguard Council members. These ideas have been tried, tested, and they work! If you are looking to start hosting social events for the first time, or just want to make your current social events bigger and better, this guidebook has a variety of tips and tricks. If chapters implement these strategies consistently, we can all have a great time and further our association, our business, and ourselves.

This guide has been broken down to four major categories:

- The Event Space
- The Sponsors
- The Communications
- The Day of the Event
- The Attendees

These are the major factors to consider when putting an event together. This guide is written as a list of recommendations based on which category they may fit into. It doesn't matter if your role is planning the entire event, or simply attending, there is something for everyone here. Go meet people!

## Event Space

Pick a central location, or if your chapter covers a large geographic area, spread the events around. Keep in mind traffic from different areas of your city can also impact someone's willingness to go to an event.

Talk about requirements. What do your social events require? Will you need food, alcohol, private space, or TVs/media? Talk with the venue about what you want the event to look like and be like, and you can direct the venue staff to deliver on what you expect.

Do they offer discounts for non-profits? Keep in mind that our local chapters are non-profit entities. Some businesses will give breaks or discounts to your chapter. Don't expect too much, but even if its removing sales tax, something is better than nothing.

Mix up the locations. Not just the geographic area, but the type of location as well. We are all adults, and many of us enjoy an adult beverage here and there. However, some people do not drink, and simply don't want to frequent bars/drinking establishments. Mix up what you are offering, and you will attract a more diverse crowd. If the event does include alcohol, be sure to limit the amount of drinks covered by the association, IF any drinks are covered at all. We do not want someone drinking excessively at an association event, causing unwanted distractions.

Try to book your event in conjunction with your sponsor. Have a conversation with them about what they want to gain from the sponsorship. Are they doing it for a specific reason? Do they have a specific message they want to relay to attendees? Work out these details ahead of time because sometimes they impact what your requirements are for the event, and where/when you can have them.

Food and drinks attract more people! Provide some sort of food, even if it is a small platter of hors d'oeuvres. At the very minimum, have water available to drink. Confirm with the venue if attendees can order on their own, if they would like something other than what is being offered by the association.

Seasonal/themes work. Encouraging themes and seasonal parties can help some attendees let their guard down and can also be a conversation starter. It's hard not to comment on a fun holiday sweater.

Private rooms are a plus. Ask the venue if they have a dedicated space for your group, even if it's just a patio. A private room, or other dedicated space, helps keep the event cleaner and easier to find. The last thing you want is for someone to show up, unable to find your party, and leave.

Be cautious of hosting events at a member's business. If they would like to host their own event, that is great, but association events should be kept neutral. You may like the idea of a free space to use, but that free space may limit who will attend.

Avoid Mondays and Fridays. People are often getting caught up on Mondays and trying to leave early on Fridays. We have found the middle of the week attracts more attendees. You may also want to alternate the day of the week for each event, to accommodate those who have standing/repeating meetings.

## Sponsors

Solicit sponsorships ahead of time. The sponsor is your partner for the event and should be confirmed prior to the event's planning. Build a rapport with your sponsor as if it is also their event (because it is!) and they will be more likely to continue partnering with you in the future. Even if your events are not very large, the ease of working with the local chapter sticks in the minds of sponsor partners.

Develop a list of interested sponsors. Keep a "bank" of potential sponsors. People often inquire about sponsorships throughout the year - write them down and let them know you will reach out when the next sponsorship opportunity arises. Ask vendors at symposiums, monthly meetings, members, etc. if they would like to be considered for future sponsorships. Keep your list updated and refer back to it continuously. Don't forget to let your fellow board members know you have the list so it can be used to contact potential sponsor partners for other purposes as well.

Pick a sponsor based on the time of year. In our industry, different products have different busy seasons. There is a time and place for everything. Oftentimes sponsors will let people know they are doing new things before the busy season starts. Carriers are looking for well-timed opportunities to contact our members. Give them an outlet for that.

Find out if the sponsor has special requirements. Does the sponsor have anything that they need to have specifically addressed by the event space? Are they wanting to pass out information? If so, what kind of information and marketing swag are they bringing? Do we need to accommodate anything? What kind of special events are they wanting to have (drawing, giveaways, trivia winnings, etc.)?

Make the goal of the event clear to the sponsor. This is intended to be a **SOCIAL** event. Do not let the sponsor turn the event into a lunch and learn, or an extensive sales pitch. People came to mingle and socialize with each other. Keep your announcements, introductions, and all other times of forced attention to a minimum.

Include the sponsor's information in the event invite. Link to their website, blog, or social media profile if possible. Include a brief overview (one paragraph or less) about the company and why they are sponsoring. Very few companies sponsor events like this without a defined goal. Find out what that goal is and incorporate strategies to help them achieve that goal starting with the first announcement/invitation for the event.

## Communications

The event's first announcement/invite should be sent 4-6 weeks in advance. The timeline for this is very important. Many people have their calendars booked out weeks in advance. Even if the first announcement is just a simple "save-the date" it should be sent far enough in advance that potential attendees with busy schedules can still make time for your event.

Gradually increase invite frequency. 6 weeks out from the event is when we should start the engagement. This means that our potential attendees will be receiving communications for six weeks regarding one event. However, the last thing we want to do is bombard potential attendees with so many emails they don't want to receive them anymore. Consider increasing communication touchpoint as you get closer to the event. Don't send more than 8-10 total emails for one event, and don't send more than two emails for one event, in the same week. We recommend one email/invite per week, and then two per week during the last 2 weeks leading up to the event (Tues/Thurs), with a reminder email ONLY to registered attendees the day before the event.

Include sponsor information in the announcements/invites. Always credit the sponsor in your communications. Thank them, share links to the information they have provided. Do not be a roadblock to the communications, help facilitate them.

Inform potential attendees of any games/prizes/drawings. People are incentivized by drawings and prizes. Don't let the opportunity to win something be a surprise when people show up. Promote it! The best practice is if you already know what is being offered - showcase it!

Don't just use email invites; utilize your social media channels. Different methods of communication are effective for different people in different ways. Don't ignore a potential channel of communication. That channel could be the only effective one in reaching a particular group of people. Keep the communication count to a minimum, as mentioned previously (no more than 8-10 total). Don't over promote, causing someone to block your page or stop following you.

Consider using Facebook live leading up to the event. Facebook live can force notifications to your followers. Most Facebook users have their settings prepared in a way where Facebook live notifications get pushed through to their mobile devices. Facebook live is a great way to get your final "touch" before the event starts. Consider also using Facebook live during the event, however, if you do this, be sure to inform those around you before you start the video. Some people may not want to be on video and should be given the opportunity to leave the area if desired.

## **Day of The Event**

If you are the host/planner, arrive 30-45 minutes prior to the event's start time. Things don't always go as planned, and you may need to coordinate or change specific details with the venue at the last minute. Be sure to bring your notes from prior communications you had with the venue's planner, to reference if something isn't the way it should be. If there are problems, work with the venue to solve them. You are the host of the event just as much as the venue is. You are responsible for the success or failure of the event. Work with the venue in a positive manner, and you are much more likely to have the ability to host future events in their space if they remember how easy you were to work with.

Introduce yourself to the person at the venue who you planned the event with, or the person they left in charge for your event. This person is going to be your "go-to" for the event. Establish how you intend to handle any mistakes, how the communication will look from your organization and tell them what to expect. This is also a good opportunity to remind them of what had been agreed to previously. If there is a difference between what you planned and what they intend to do, it is best to discover that before people start showing up.

Check in with your contact throughout the event. Every 30 minutes or so, go and check with your contact to make sure everything is going smoothly. They can give you a heads up to problems that may be on the horizon or they can communicate attendee complaints, so you can address them immediately, if necessary.

Nametags! Sure, most of us know each other, but we want to create an environment for welcoming new people. Nametags give an easy way to break the ice and spark conversations. They don't have to be fancy, just give people the chance to display who they are. Inversely, don't forget to introduce new people to those who have been around for a while. The nametags also give us the ability to view who did and did not come.

Remember, YOU are the host of this event. Force introductions. Facilitate discussions that otherwise might not happen. If you notice someone new, or someone isolated, go talk to them and bring a friend along. Take a proactive role in making newcomers feel welcome and introduce them to others. This may be someone's first association event and could determine if they return to other events in the future. You only get one first impression!

## Attendees

Go! You can't meet new people if you don't show up.

Practice questions. If you have nothing to talk about, ask them a question they didn't expect. At networking events everyone asks the same boring questions. Spice it up! Random conversations will lead back to the intersection of interests. That is where you want to be. Find a few questions that you can ask anyone that will make them think. Try to avoid divisive topics.

Be outgoing. Remember, everyone in that room came to meet people and strengthen connections. This is the best time for people who are not comfortable talking to strangers, to practice. Everyone came there to meet people, just like you. The only way you can fail at networking is to not talk. Believe that you have something to offer, and go share that something with others.

Set a goal. If you have a goal to work towards, you will mentally align your actions with your goal. Define a number of new people you would like to meet, define one person you want to talk about X topic with, or if you tend to be introverted simply set the goal on how many people you will START a conversation with.

Smile and have fun! People who are smiling are more approachable to others. Remember, you are there to have fun. Let your hair down, loosen your tie, roll up your sleeve, and just have fun!