

How to Create a Marketing Event

Description

Use this function in the Marketing Events tab to allow you to plan, record, and manage marketing events, RSVPs, and name tags as part of your sales efforts.

Step by Step

- 1** Navigate to the Marketing Events tab
- 2** Click **New**
- 3** Enter the **Marketing Event Name**
- 4** Specify your **Community**
- 5** Select the **Type** of event
- 6** Enter the **Event Date**
- 7** Specify a **Marketing Plan** if you have one preset
- 8** Enter the **Budget**
- 9** Enter the **Target Number of Visitors** for the event
- 10** You may also select an **Audience**
- 11** If the event is being coordinated by a third party, specify an **Account** and **Contact** as your main point of contact in organizing the event. They should already be entered in the system for your outreach partners.
- 12** Select the **Analysis Category** to specify whether the event is *Onsite*, *Offsite*, or a *Trade Show*.
- 13** Select the **Ranking**
- 14** Click **Save**


Marketing Event
Mother's Day
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Marketing Event Detail

Marketing Event Name	Mother's Day	Owner	Larry Wieskopf [Change]
Community	iaRetirement - GTA	Event Date	2/2/2012
Type	Marketing; Resident Lifestyle		

▼ Planning

Marketing Plan	Monthly Community Outreach	Audience	Prospect; Resident
Budget	\$800.00		
Target No. of Visitors	50		

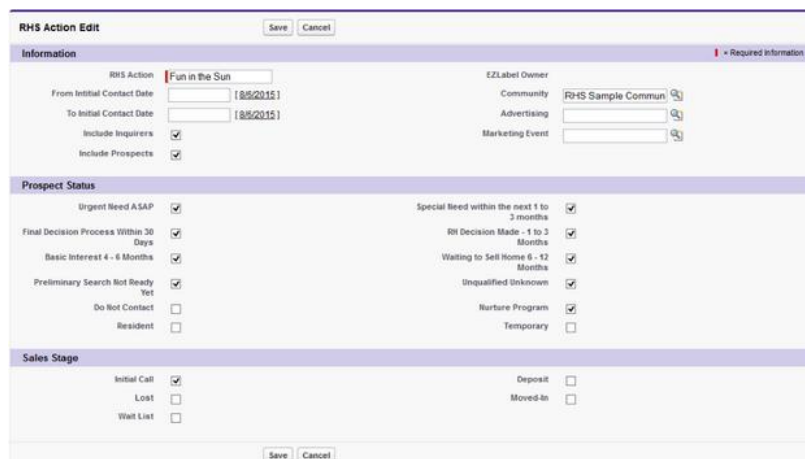
▼ Offsite Event Information

Account	
Contact	

▼ Marketing Analytics

Analysis Category	Onsite
Ranking	A - Top 10%

- 15** Click **Invite Prospects**
- 16** Enter an **RHS Action**. This is the title of your event.
- 17** Specify **From Initial Contact Date** and **To Initial Contact Date** if you would like to filter out only Prospects and Inquirers who contacted you in a given time frame
- 18** Verify **Community**. If incorrect, specify the correct **Community**.
- 19** Check the box to **Include Inquirers** on the list of invitees
- 20** Check the box to **Include Prospects** on the list of invitees
- 21** Check the applicable boxes for **Prospect Status**
- 22** Check the applicable boxes for **Sales Stage**
- 23** Verify the data and click **Save**



RHS Action Edit

Information Required information

RHS Action: EZLabel Owner

From Initial Contact Date: Community:

To Initial Contact Date: Advertising:

Include Inquirers: Marketing Event:

Include Prospects:

Prospect Status

Urgent Need ASAP: Special Need within the next 1 to 3 months:

Final Decision Process Within 30 Days: Rt Decision Made - 1 to 3 Months:

Basic Interest 4 - 6 Months: Waiting to Sell Home 6 - 12 Months:

Preliminary Search Not Ready Yet: Unqualified Unknown:

Do Not Contact: Nurture Program:

Resident: Temporary:

Sales Stage

Initial Call: Deposit:

Lost: Moved-In:

Wait List:

- 24** Click **Generate Address List**
- 25** Scroll down to the **RHS Reports** section
- 26** You can see the number of Prospects you will be inviting. Click on the latest **EMx number**, which you have just generated.

RHS Reports					
Action	Report	Community	Created Date	Number of Lines	Owner
Delete Edit	EMx-0014643	RHS Sample Community	8/7/2015 10:16 AM	125	Neomi Tsekman

- 27** Click the **Add to Event** button to add the list of Prospects to the event
- 28** To manage your RSVPs, navigate back to your event's profile page and click the **RSVPs** button
- 29** The RSVP Manager will pop up. Here, you can specify which Prospects or Residents RSVP'ed to the event, the number of people to attend, and after the event takes place you can record who attended. You can also add additional Prospects directly from this manager.

RSVP	# RSVP	Attended	# Attended	Prospect	Resident	Contact	Action
<input type="checkbox"/>	0	<input type="checkbox"/>	0	aaa_test4			Add Prospect Delete
<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	2	Radulescu, Alex			Add Prospect Delete
<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>	3	Acorn, Art & Joyce (Art & Jo)			Add Prospect Delete
<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	2	Albert, June (June Albert)			Add Prospect Delete
<input type="checkbox"/>	0	<input type="checkbox"/>	0	Albert, June (June Albert)			Add Prospect Delete
<input checked="" type="checkbox"/>	1	<input type="checkbox"/>	0	Anderson, Rebecca (Rebecca)			Add Prospect Delete
<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	3	April, Abram (Abram April)			Add Prospect Delete
<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	2	Baron, Ken (Archie & Irene)			Add Prospect Delete

- 30** When you finish working with the RSVP Manager, click **Save this Section**

Related Lists

Open Activities – Use this list to create new tasks to help plan and manage the event.

Activity History – This list displays all completed tasks, logged phone calls, expired events, and emails for the event.

Notes and Attachments – Use this section to attach any documentation or notes having to do with the event.

Attendees – This is a list of people expected to attend the event.

New Prospects – Use this section to upload the names and related information for new prospects who may be interested in your community as a result of the marketing event.

Open Activities New Task New Event Open Activities Help ?

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Prepare Menu		✓	4/1/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Order Room Decorations		✓	5/7/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Work with Resident Ambassador's on planning		✓	5/7/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Prepare Muffins for Event (20)		✓	6/23/2013	Not Started	Normal	Frank Leung

Activity History Log A Call Mail Merge Send an Email View All Activity History Help ?

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Review last year's event and plan		<input type="checkbox"/>	2/2/2012 2:00 PM	Larry Wieskopf	4/8/2013 1:34 PM

Notes & Attachments New Note Attach File Notes & Attachments Help ?

No records to display

Attendees New Marketing Events Attended Attendees Help ?

Action	Audit No.	Prospect	Contact	Resident Name	Resident	Prospect Attended - PL
Edit Del	MEA-1000000			Dr. John Adams	R-10081	
Edit Del	MEA-1000001		Julie Adams			
Edit Del	MEA-1000002	Swanson, Albert (Albert & June)				
Edit Del	MEA-1000004	Smith, Bill (Bill Smith)				
Edit Del	MEA-1000005	Whithorne, Walt (Walt & Judith)				
Edit Del	MEA-1000009	Swanson, Albert (Albert & June)				
Edit Del	MEA-1000012	Lazer, Boris (William Lazer)				

Prospects New Prospect Prospects Help ?

Action	Name
Edit Del	Downing, Ronald (Ronald Downing)
Edit Del	Down, Robert (Robert & Judy)
Edit Del	Swanson, Albert (Albert & June)
Edit Del	Thompson, John (John & Jill)
Edit Del	Williams, Barb (Bob & Barbara)