

## VTI Dinner Meeting Program “How To” and “Best Practices”

One of the most proven programs is dinner meetings. For a dinner meeting to be successful, the sales representative must ultimately have the necessary tools to manage your program at your fingertips.

There are 3-Steps to organizing a successful Dinner Meeting:

### **Step 1 – Planning.**

This outline details key considerations in setting up a successful dinner meeting.

### **Step 2 – Request A Meeting with a Speaker.**

How to request dates for dinner meetings with a speaker.

### **Step 3 – Communication.**

How to electronically manage the invite list – pulling a list from SFDC, setting up the email with the electronic invitation and management of RSVP's and follow up communication.

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# STEP 1: Guide to Planning a Dinner Meeting

This is where it all starts. Investing sufficient time to plan will place you in an excellent position to yield value with your practitioners. We created below some key considerations, tips, and checklist to support you.

## Identify date, time and location.

- **Identify the date:** Final dates may depend on speaker availability so think timing first. Please plan your meeting **at least 5-6 weeks in advance**. Look at two alternative dates.
- **Timing of the dinner meeting:** Best days of the week tend to be Tuesdays and Thursdays.
- **Speaker options:**
  - Our Speaker's Bureau of Key Opinion Leaders includes the following:
    1. Thomas Aller, OD, FB, San Bruno, CA
    2. Thomas Arnold, OD, FSLs, Sugar Land, TX
    3. Melissa Barnett, OD, FAA, Sacramento, CA
    4. Doug Benoit, OD, FAAO, Atlanta, GA
    5. Chad Carlsson, OD, Gilbert, AZ
    6. Jeffrey Cooper, OD, New York, NY
    7. Kenneth Daniels, OD, Lambertville, NJ
    8. Jennifer Dattolo, OD, FCOVD, Woodstock, GA
    9. Melanie Frogozo, OD, FAAO, FSLs, Austin, TX
    10. Lisa Heuer, OD, Sacramento, CA
    11. Jeff Jeruss, OD, FIAO, Atlanta, GA
    12. Brett O'Connor, OD, Jacksonville, FL
    13. Daniel Press, OD, Deerfield, IL
    14. Charles Shidlofsky, OD, FCOVD, Dallas, TX
    15. Steven Sorkin, OD, FSLs, Fairfield, NJ
    16. David Sweeney, OD, Atlanta, GA
    17. Amber Zaunbrecher, OD, Atlanta, GA
- **Restaurant selection:**
  - **Meeting space:** Choose a restaurant that has a **quiet, private room** that will hold **about 20-25 people**.
    - These types of larger restaurants usually have an event coordinator to assist you in your planning.
    - It is suggested that you go see the room to ensure that it can easily accommodate enough room for the speaker to move and that it has accessible seating and serving (adequate movement for wait staff).
  - **A/V Equipment:** Make sure that the restaurant has appropriate audio/visual equipment, specifically:
    - Microphone (do not count on the room being quiet enough to hear clearly)
    - Flat screen video monitor with an HDMI connection for tablet or laptop or LCD projector and screen (either separate or built-in). Make sure you have the appropriate connectors.
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- **Contracts:** It is customary for the restaurant to require a signed contract guaranteeing a specific number of attendees. So, make sure that your date is firm with the speaker confirmed before signing contract. To manage your commitment to the restaurant before you have a final count, base your quote on only a portion of who have RSVP's and update with final numbers closer to the date.
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## Success Tips

- ✓ Start early – make a request for your speaker
  - ✓ Book Tuesday or Thursday
  - ✓ Plan quiet, private room and large room
  - ✓ Ensure they can handle audio/visual equipment
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## Outline the agenda and flow of the meeting.

Recommended details below:

- **Start time:** 6:30pm
  - That gives practitioners enough time to leave the office and account for reasonable travel to restaurant
- **Social time:** 6:30pm to 7:00pm
  - Allow social time from urging attendees to take their seats around 7:00pm
- **Dinner selections:** 7:15pm
  - Advise the waiters to take dinner selections so that ample time is allowed for dinner, and presentation can end at a reasonable time.
- **Presentation:** 7:30pm to approximately 8:30pm/9:00pm
  - This should adequately allow presentation time for the speaker and a Q & A session at the end (with dessert).

## Plan a pre-set menu and room set-up ahead of time with the restaurant.

- **Suggested main course:** Steak, chicken and/or fish entrée. Consider special diets.
- **Budget recommendation per person:** ~\$100 per person including all beverages and tip.
- **Table set-up:** Have the place settings set-up on one long table – this works best to keep everyone engaged and focused.

## Plan the guest list.

- **Ideal attendance size:** 15 to 20 doctors per presentation.
  - Historically for every 1 doctor to show – you will need to invite 2-3 doctors
  - Invitation list should be around 40-50 people per dinner meeting
- **Timing to send Invitation:** Initial invitations should be sent at least **3-4 weeks** prior to the dinner meeting.
  - A custom printed invitation for a dinner meeting may be requested through the VTI Resource Portal [Click here](#)
  - You should resend the electronic invitation **again 2 weeks** before the meeting
- **Types of attendees to have at the meeting:**
  - Include 5-8 doctors who have had good success with NVMF
  - The remainder should be those just getting started or are struggling with success.
  - Ask successful doctors prior to the meeting if they would be willing to share their experiences, fitting tips for success patient feedback.

## Frequent, persistent follow up is the key to attendance.

- Ask for their commitment to attend at every call prior to the meeting. Supplement with phone calls and texts as necessary.
  - Promote the speaker and the content of the presentation.
  - **3-4 days prior to meeting:** Email/text all commitments and reaffirm their RSVP; State to them: I have "you as confirmed to attend" the dinner meeting on X date at X location. Make sure they have another copy of the meeting details.
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## Success Tips

- ✓ Start early – schedule your quarterly dinner meeting right after you complete your last one
  - ✓ Mix up your speakers and locations
  - ✓ Pay attention to special diets of the guests
  - ✓ Create your invitation early
  - ✓ Invite 40-50 guests per dinner meeting
  - ✓ Update your guest list with those who could not attend the last time
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# Dinner Meeting Planning Checklist

## 5-6 weeks in advance

- Identify date, time and location
- Outline the agenda and flow of the meeting
- Make your dinner meeting request through the VTI Resource Portal
- Plan the guest list

## 3-4 weeks in advance

- Confirm your speaker with Doug Benoit
- Plan a pre-set menu and room set-up ahead of time with the restaurant
- Confirm the guest list
- Send out invitation

## 2 weeks in advance

- Resend out invitation
- Confirm logistic with restaurant
- Confirm slide presentation with speaker
- Confirm promotional materials

## 3-4 in advance

- Confirm final guest count with restaurant
- Confirm logistic with restaurant (AV/meal/payment)
- Confirm logistic with speaker
- Confirm your attendees

## Day of event

- Arrive 30 minutes before
- Confirm timing with restaurant
- Confirm agenda with speaker
- Have promotional materials
- End - Collect surveys and book follow-up meetings with guests

## STEP 2: Request a Speaker

Go to **VTI Resource Portal** and click **DINNER MEETING** and complete the form with the following information.

To get started:

1. Select your name, phone number and email address from dropdown menus.

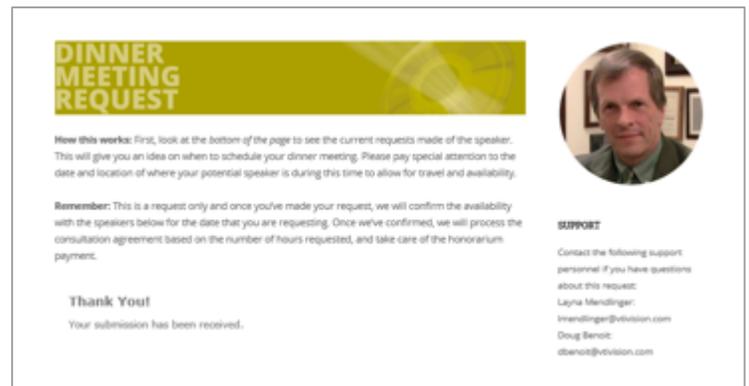
At the bottom of the request site are calendars where you will input your first and second choice date requests.

2. Select dinner meeting information:

- Preferred date (and alternative date)
- Time for Social Hour (if any)
- Time for Presentation
- Location / Facility and address, phone number & website
- Select the product/topic for meeting
- Select RSVP by Date

3. SUBMIT

Once you have clicked SUBMIT, you will see an acknowledgement that your request has been sent to Dr. Doug Benoit for scheduling.



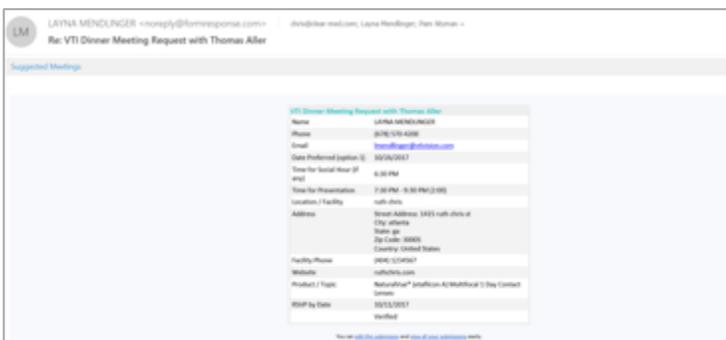
**DINNER MEETING REQUEST**

**How this works:** First, look at the bottom of the page to see the current requests made of the speaker. This will give you an idea on when to schedule your dinner meeting. Please pay special attention to the date and location of where your potential speaker is during this time to allow for travel and availability.

**Remember:** This is a request only and once you've made your request, we will confirm the availability with the speakers below for the date that you are requesting. Once we've confirmed, we will process the consultation agreement based on the number of hours requested, and take care of the honorarium payment.

**Thank You!**  
Your submission has been received.

**SUPPORT**  
Contact the following support personnel if you have questions about this request:  
Layna Mendinger: [lmendinger@vtivision.com](mailto:lmendinger@vtivision.com)  
Doug Benoit: [dbenoit@vtivision.com](mailto:dbenoit@vtivision.com)



VTI Dinner Meeting Request with Thomas Alier

Name: LAYNA MENDINGER  
Phone: 878-525-4388  
Email: [lmendinger@vtivision.com](mailto:lmendinger@vtivision.com)  
Date Preferred (optional): 08/06/2017  
Time for Social Hour (if any): 6:30 PM  
Time for Presentation: 7:30 PM - 9:30 PM  
Location / Facility: Lafayette  
Address: Street Address: 1000 Lafayette St  
City: Lafayette  
State: LA  
Zip Code: 70501  
Country: United States  
Facility Name: LAFAYETTE  
Website: [lafayette.com](http://lafayette.com)  
Product / Topic: National Appliance Maintenance Day Contact Center  
RSVP by Date: 08/15/2017  
Method: Webform

You will also receive a confirmation that your request has been received.

**NOTE: This submission is a request only, not confirmation that a speaker has been secured.**

Dr. Doug Benoit will contact the speakers and check availability. He will handle the details such as honorarium and expenses, as well as providing the speaker with the presentation outline. Once Dr. Benoit has confirmed the speaker for your date, he will contact you via email. Also included in his email will be a link to the next step, Communication or "How to Invite Guests".

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## Success Tips

- ✓ Start early – schedule your quarterly dinner meeting right after you complete your last one
  - ✓ Check the resource portal for other events in your area
  - ✓ Download the selling presentation so you have a copy always
  - ✓ Order sufficient promotional materials early (minimum 7-10 days in advance)
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## Step 3: Communication

Now that you have a speaker and a date/location confirmed, it's time to communicate to practitioners you'd like to invite to your event.

With this program, you will be able to:

- ✓ Generate a list of attendees
- ✓ Create a custom invitation that can be emailed and printed
- ✓ Send a personalized email from you
- ✓ Track respondents and manage follow up communication

VTI has created a way for you to set up your own dinner meeting invitations and communications within SFDC.

You will be using two new areas in SFDC:

- SFDC uses an object called CAMPAIGNS to help manage a group of people (called members) that will be participating in an event (a 'campaign'). With Campaigns, we can organize an event, track response to an event and eventually evaluate the Return on Investment (ROI) of an event.
- SFDC also uses a program called ENGAGE. This is the communication platform for how invitations will be sent.

### **Below are the steps in setting up a dinner meeting in SFDC.**

It is highly recommended that you watch the short video instructions to familiarize yourself with how this works.

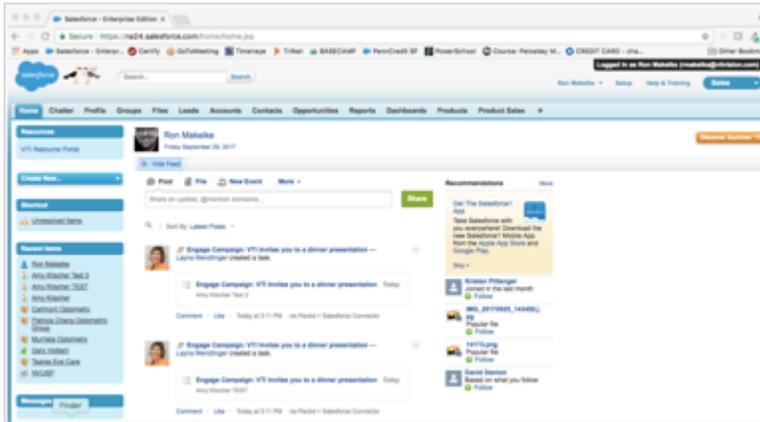
[\[Click here to view video\]](#)

There are 3 major tasks in setting up a dinner meeting:

- Generating a list of attendees
- Sending your customized invitation
- Tracking respondents

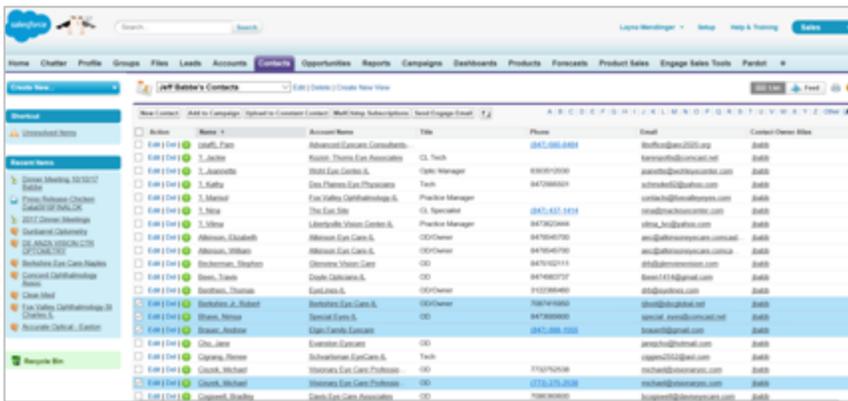
# Generating a list of attendees:

1. To begin, go to your SFDC homepage.

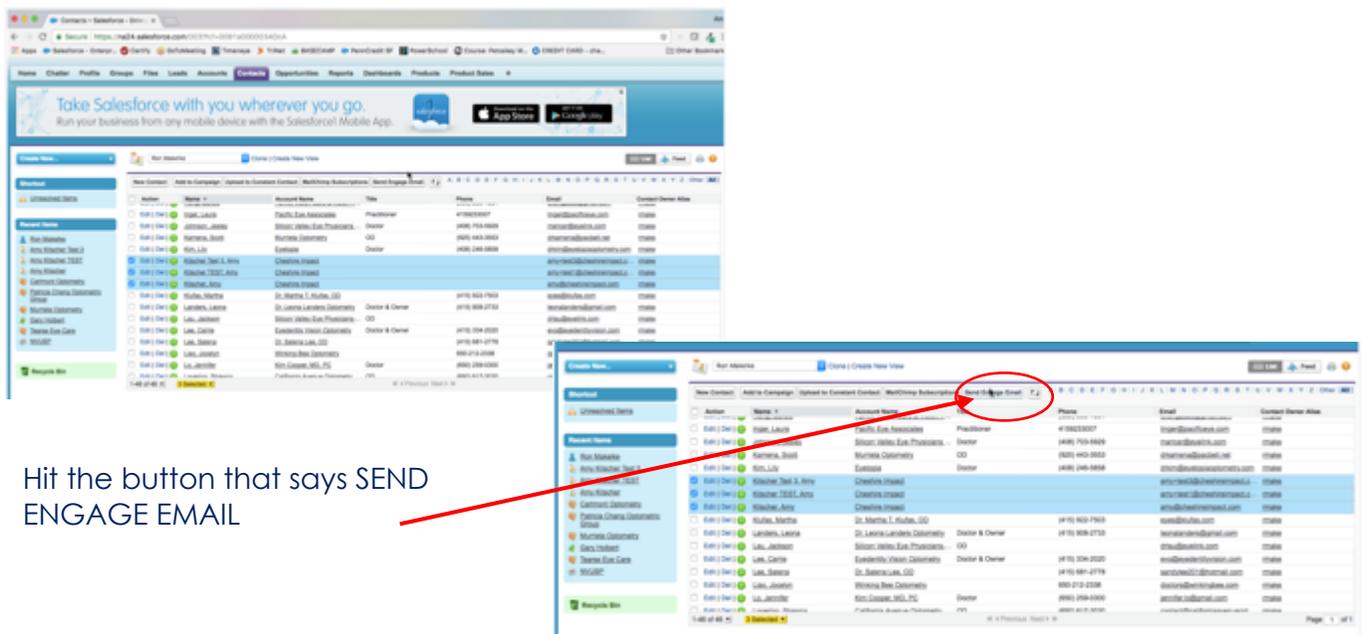


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2. Navigate over to the top bar and click CONTACTS (to get to doctors that are attached to ACCOUNTS) and Go to listing that is your Contact list (i.e. Ron Makelke Contacts)



3. Check all of the people who you want to invite to your event

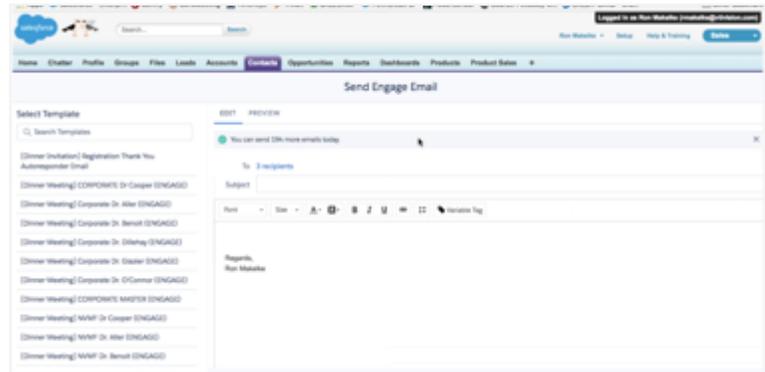


4. Hit the button that says SEND ENGAGE EMAIL

## Sending a customized Invitation:

Now that you are in the ENGAGE section of SFDC, you are now ready to customize your email invitation.

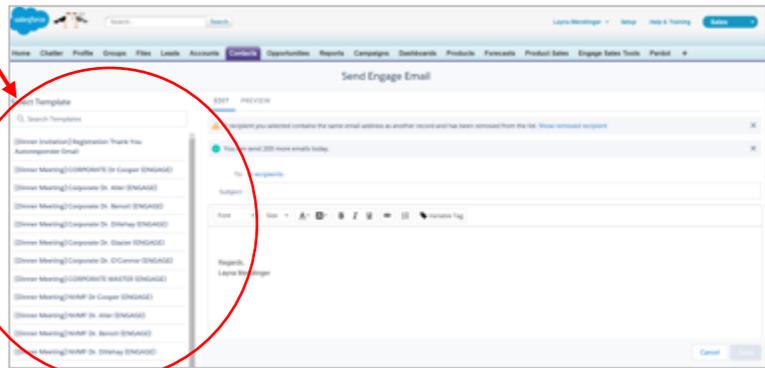
1. The ENGAGE screen comes up to an open Email screen



2. Select a **pre-approved dinner** meeting invitation template from the list on the left panel with your confirmed speaker.

There are 3 variations of each:

- One specifically for NaturalVue Multifocal
- One specifically for NaturalVue Sphere
- One that is more generic (Corporate) for presentations where you may discuss multiple subjects.



...for each of our speakers:

Speaker:

- Doug Benoit, OD
- Sally Dillehay, OD
- Brett O'Conner, OD
- Tom Aller, OD
- Alan Glazier, OD
- Jeff Cooper, OD

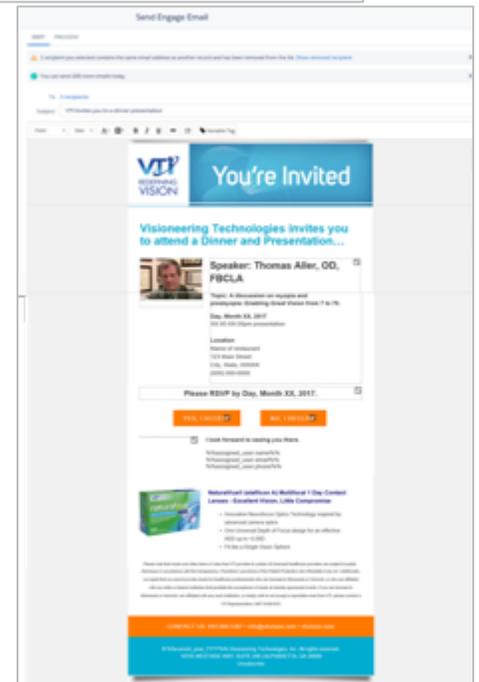
3. Customize your invitation with the following information:

- Date / time
- Location
- RSVP date
- Sales representative Name / contact information

- **Double check:**

- Are all of your selected invitees listed?
- Do you have the correct spelling of location?
- Are the date/day of week are aligned and correct?

4. Hit SEND



### To Include Leads:

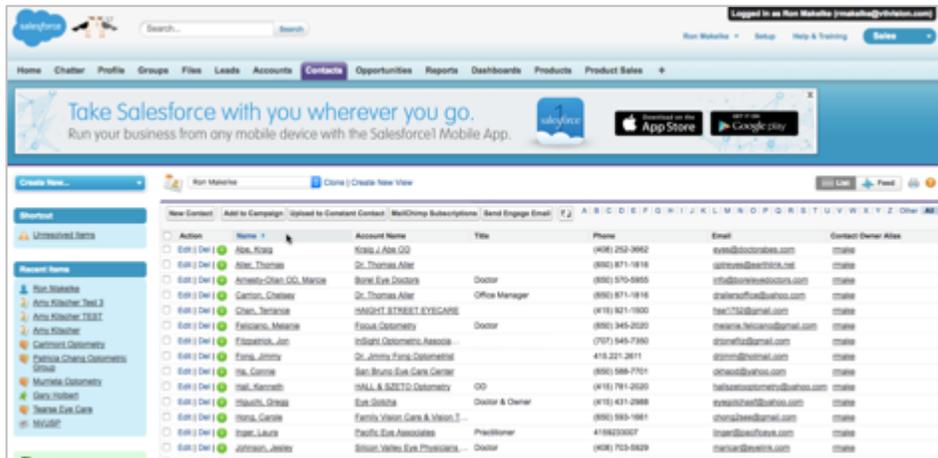
Note: There is a system limitation with SFDC regarding the ability to select both CONTACTS and LEADS and send emails at the same time. If you want to invite doctors who are LEADS, you can do so, but you will need to send them as a second list/second email. Just go through the same instructions as above:

1. GENERATE YOUR LIST - go to your LEADS tab and make your selections, then hit SEND ENGAGE EMAIL.
2. Select the template you just utilized and complete the information
3. Send.

## Tracking Respondents:

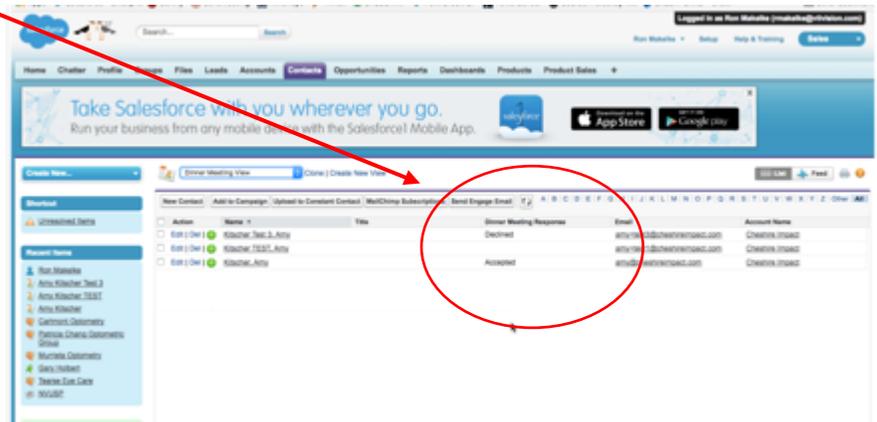
You will want to check the activity with your invitees.

1. Go back to your homepage to your CONTACTS tab.



2. Scroll down until you see a default view entitled Dinner Meeting View. This should give you a view to the status of your invitees.

Responses will be shown as **Accepted or Declined**. If the Dinner Meeting Response column is blank or empty, it means that the doctor has not responded yet.



3. If you would like to **send a follow-up email**, check the boxes next to the names and click SEND ENGAGE EMAIL to put you back into the ENGAGE Studio. Once there you can choose to send a new email invitation.

If this is a reminder, change the subject line to include the word REMINDER.