

Dinner Meeting Instruction Cheat Sheet

| STEP 1: Planning | STEP 2: Request a Speaker | STEP 3: Communication |
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| Choose date, time and location and preferred speaker options. | Go to VTI Resource Portal. Pick tab: DINNER MEETING | Create a list of attendees: <ol style="list-style-type: none"> To begin, go to your SFDC homepage. Navigate over to the top bar and click CONTACTS (to get to doctors that are attached to ACCOUNTS); then go to listing that is your Contact list (i.e. Ron Makelke Contacts) Check all of the people who you want to invite to your event Hit the button that says SEND ENGAGE EMAIL |
| Create agenda and flow of the meeting. | Select your preferred speaker from provided list | Sending a customized Invitation: <ol style="list-style-type: none"> The ENGAGE screen comes up to an open Email screen Select a pre-approved dinner meeting invitation template from the list. Customize your invitation with date/time/location. Hit SEND <p>To Include Leads: Repeat same steps under LEADS view.</p> |
| Plan a pre-set menu and room set-up ahead of time with the restaurant. | Select your name, phone number and email address from dropdown menus. | Tracking Respondents: <ol style="list-style-type: none"> Go back to your SFDC homepage to your CONTACTS tab. 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. 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. |
| Plan the guest list. | Complete dinner meeting form and hit SUBMIT . | Have a great meeting! |