

The Partnership



PIA PARTNERSHIP TOOLS FOR PROFESSIONAL INDEPENDENT AGENTS

Young Driver Seminar

FORMS

Young Driver Seminar

Location and co-hosting CHECKLIST / WORKSHEET

Basic location requirements:

Number of people expected to attend:

Notes: _____

Availability of needed chairs & tables:

Notes: _____

Microphone, audio playback & sound system needed:

Notes: _____

Video projector & screen availability:

Notes: _____

Day of the week and approximate starting time:

Notes: _____

Length of the seminar:

Notes: _____

Advance time needed for set-up:

Notes: _____

Special requirements or provisions (required by the location):

Notes: _____

Additional location requirements:

Notes: _____

Location specifics:

Location name: _____

Location address: _____

Contact name: _____

Contact address: _____

Contact phone number: _____

Set-up start time: _____

Guest arrival time: _____

Program start time: _____

Program conclusion time: _____

Time to be out of the location: _____

Location expenses:

Notes: _____

Possible co-hosts:

Organization name: _____

Contact name: _____

Contact address: _____

Contact phone number: _____

Description of what they will provide:

Notes: _____

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Organization name: _____

Contact name: _____

Contact address: _____

Contact phone number: _____

Description of what they will provide:

Notes: _____

Organization name: _____

Contact name: _____

Contact address: _____

Contact phone number: _____

Description of what they will provide:

Notes: _____

Young Driver Seminar

Those who will be making presentations CHECKLIST / WORKSHEET

Make a copy for each presenter:

Organization name: _____

Presenter name: _____

Presenter email address: _____

Presenter phone number: _____

Presentation content description:

Notes: _____

Specific requirements they may have:

Notes: _____

What they need to set-up in advance:

Notes: _____

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Handouts they will be providing (number of copies needed?):

Notes: _____

Need for A-V or other special support:

Notes: _____

Time and length of their presentation: _____

Time they should they arrive: _____

Time they will they be able to leave: _____

Making Preparations

CHECKLIST / WORKSHEET

Now that you've made your initial decisions regarding location, partners and who you'll invite, you'll need to make preparations in advance of the actual date of your event.

The following is a checklist you can use (and add to) to help you keep track of these preparations:

Secure materials to share with seminar attendees

☐ Brochures (company & agency)

☐ Appropriate agency logo items

☐ Name tags

☐ Other

Notes: _____

Invitations to attendees

☐ Send out invitations for the event one month in advance

☐ Ask for an RSVP

☐ Send out follow-up invitations two weeks before the event

☐ Ask for an RSVP

Notes: _____

Secure refreshments for the event either one day prior or the day of the event

☐ Drinks (water, coffee, juice, milk)

☐ Cookies / brownies

☐ Napkins / cups

Notes: _____

