

EVENT IN A BOX

Event Guide

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EVENT IN A BOX Event Checklist

What is your role? Book your event, invite, engage, and enjoy.

☐ BOOK YOUR EVENT

Choose your next event to host [here](#).

Password: Cetera

We have partnered with MC&A to provide a variety of event options. Upon choosing your event, the MC&A team will contact you to schedule and set up your event.

☐ INVITE YOUR GUESTS

[MarketingCentral](#) makes it easy to manage and promote your event using the Event Builder. See pages 2-4 for step-by-step instructions to create your event landing page and invitations using MarketingCentral.

The event platform automatically sends a confirmation email when someone registers for your event as well as a reminder email the day before the event.

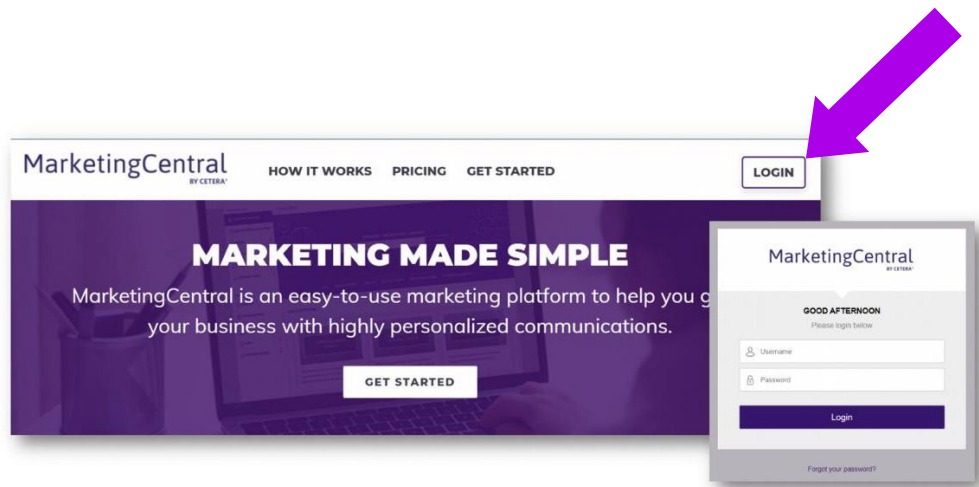
☐ ENJOY

Enjoy your event with your guests!

MC&A will partner with you to set up the Zoom meeting. If applicable, ensure Zoom recordings are communicated properly to your guests. It is recommended to turn off the chat feature, however, if left on, the entirety of the chat must be reviewed and retained. Please ensure you print out the event's full chat history and provide to your designated supervisor for retention in the correspondence file.

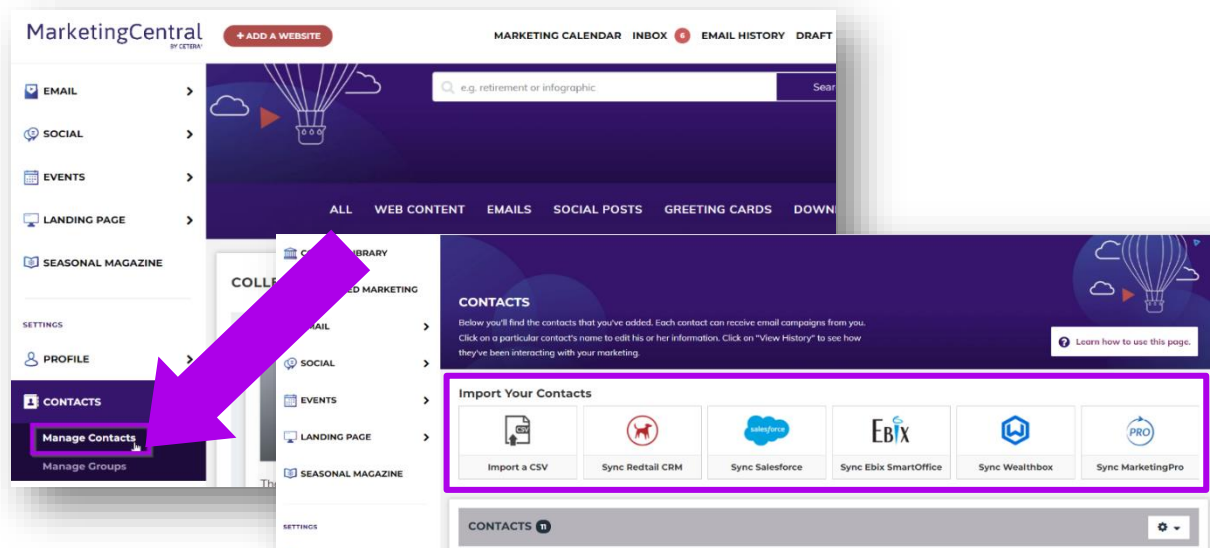
How to Use MarketingCentral to Invite Your Clients

Step 1: Log in to Your MarketingCentral Account www.CeteraMarketingCentral.com
Once your event is booked, you can build a landing page and promote your event using MarketingCentral's Event Builder. If you don't have a MarketingCentral account, simply click the **Get Started** button to create one. Once your account is created, you'll receive a [QuickStart Guide](#) to assist with setting up your profile.



Step 2: Ensure Your Contacts Are Up to Date

Before developing communications for your event, create your invitee list by grouping your contacts either in MarketingCentral or your CRM platform (if syncing). For more information about managing your contacts, see step 6 in the MarketingCentral [QuickStart Guide](#).



Visit the Downloadables section in MarketingCentral's content library and select **Event Kits** from the dropdown. There you can download the **Connect2Investors / EVENT IN A BOX** event kit for images to include on your event's landing page.



Click on **Events** from the left navigation bar, then **Create Event**. Enter your event details in all required/desired fields. For the **Landing Page Header Image**, we recommend using the applicable image from the downloadable event kit (see Step 3).

When setting up the registration options, select the option to allow guests to register for the event. You may also select when you want to close registration.

When ready, click **Publish**. Your event will then be routed through to Advertising Review for approval.

Note: You will be able to track registrations within MarketingCentral as your guests register for your event.

Step 5: Invite Your Guests

To check your event's approval status and promote your event, click on **Events**, then **My Events**.

EVENT DATE	EVENT TITLE	STATUS	RSVPS	ACTIONS
03/10/23 2:00PM - 3:00PM (PST)	WEBINAR: How to Deal with Market Uncertainty	Published	7	Promote Copy Delete
06/04/22 9:00AM - 10:00AM (PST)	Financial Literacy 101 - DEMO	Published	0	Promote Copy Delete
03/30/22 4:00PM - 5:00PM (PST)	Virtual Cocktail 101 Mixology class	Published	1	Promote Copy Delete

There are three channels to promote your event in MarketingCentral, as well as a direct link to your event's landing page that can be shared out. To send out pre-approved email invitations or social post announcements, select **Use**. These sequences include a series of touchpoints that automatically populate based on your event's details, but you may select to make edits and update the schedule of sends/posts if desired.

Note: If you are inviting a select list of clients, then social should not be used as posts are visible to all social profile followers.

Dashboard / My Events / Virtual Cocktail 101 Mixology class / Promote Event

CHOOSE A PROMOTION CHANNEL How would you like to promote your event?

Emails
An email sequence to encourage guests to RSVP for your event.

Social Media
A sequence of posts tailored to the social media platforms you select.

Greeting Cards
A greeting card will be mailed with an invite to your event.

Event Registration page: [PREVIEW](https://www.library-messages.com/4ea700c6-1aaa-4457-9bc7-72a3eb5dab7f/events/virtual-cocktail-101-mixology-class) <https://www.library-messages.com/4ea700c6-1aaa-4457-9bc7-72a3eb5dab7f/events/virtual-cocktail-101-mixology-class>

Downloadable Client Communication

If you are not subscribed to MarketingCentral, downloadable client communications are available for you to download by clicking [here](#).

Client communication instructions:

- Letters must be sent on your compliance-approved stationery or via email with your approved email signature block.
- If you make any changes to the communication, you must submit to Advertising Review for approval prior to sending or posting.
- If posting to social media, you are required to have Social Media Supervision monitoring your social accounts.

Want to get started with MarketingCentral for streamlined communications?

Visit www.ceteramarketingcentral.com or reference the QuickStart Guide [here](#).