

3 Month Pre-Launch CHECKLIST



- Items completed with Convene support **with or without** a signed Marketing Agreement
- Items completed with Convene support **only with** a signed Marketing Agreement

Convene

Chair

	WEEKS 1-2 Setup	WEEKS 2-4 Connector Events	WEEKS 5-6 Post Connector Activities	WEEKS 6-8 Member Discovery Events	WEEKS 8-10 Launch Member Recruiting	WEEKS 10-12 Launch
Convene	<ul style="list-style-type: none"> <input type="checkbox"/> Set Up Convene email <input type="checkbox"/> Add Chair to Convene website <input type="checkbox"/> Upgrade to Sales Navigator <input type="checkbox"/> Send New Chair Kit <input type="checkbox"/> Order Convene business cards <input type="checkbox"/> Set-Up HubSpot <input type="checkbox"/> Schedule Connector call with Melody <input type="checkbox"/> LinkedIn Profile Optimization 	<ul style="list-style-type: none"> <input type="checkbox"/> Monitor Event RSVPs <input type="checkbox"/> Pull LinkedIn Connector ReferralLists for RSVPs <input type="checkbox"/> Create Connector Event page <input type="checkbox"/> Send Connector Event invites <input type="checkbox"/> Send Connector Event materials <input type="checkbox"/> Confirm Chair Coach is attending the event 	<ul style="list-style-type: none"> <input type="checkbox"/> Add referrals to HubSpot <input type="checkbox"/> Set-Up Digital Marketing Campaign <input type="checkbox"/> Generate 200+ Leads in Sales Navigator <input type="checkbox"/> Johnny to initiate messaging campaign (200+ Leads) 	<ul style="list-style-type: none"> <input type="checkbox"/> Monitor event RSVPs <input type="checkbox"/> Create Discovery Event Page/Invites <input type="checkbox"/> Message LinkedIn referrals <input type="checkbox"/> Assign interested leads to the Chair in HubSpot <input type="checkbox"/> Chair Coach attend the event 	<ul style="list-style-type: none"> <input type="checkbox"/> Pull LinkedIn Referral lists for members <input type="checkbox"/> Message LinkedIn Referrals and monitor replies 	<ul style="list-style-type: none"> <input type="checkbox"/> Message LinkedIn Referrals and monitor replies <input type="checkbox"/> Send monthly content and Actions and Insights <input type="checkbox"/> Schedule quarterly Speakers <input type="checkbox"/> (Speakers are available once there are 5 full-paying members in the group)
Chair	<ul style="list-style-type: none"> <input type="checkbox"/> Complete "Month 0" tasks in HubSpot <input type="checkbox"/> Update LinkedIn Profile <input type="checkbox"/> Access your Convene email <input type="checkbox"/> Set up email signatures in Outlook & HubSpot <input type="checkbox"/> Campaign Launch Call <input type="checkbox"/> Join Pre-Launch CST Call <input type="checkbox"/> Schedule One2One Call w/ Chair coach <input type="checkbox"/> Develop Business Plan <input type="checkbox"/> Review of all Marketing Collateral, Website, ChairHub / Chair University, and other Convene Resources <input type="checkbox"/> Send Personal Contact List 	<ul style="list-style-type: none"> <input type="checkbox"/> Develop your script, messaging, and vision <input type="checkbox"/> Confirm 15 Connectors to attend Connector Event <input type="checkbox"/> Gather 360 names of potential connectors <input type="checkbox"/> Confirm Connector Event date, time, and location <input type="checkbox"/> Approve Connector Event Email Invites <input type="checkbox"/> Review Convene Discovery Event Checklist <input type="checkbox"/> Connector Event Overview Call with Chair Coach <input type="checkbox"/> Access and download Discovery Event PowerPoint and videos <input type="checkbox"/> Make reminder calls/texts to Connector RSVPs <input type="checkbox"/> Print referral lists and name tents for Connector Event 	<ul style="list-style-type: none"> <input type="checkbox"/> Return referral lists to the Marketing team – after the Connector Event <input type="checkbox"/> Send thank you cards or emails to connectors that attended the event <input type="checkbox"/> Send connector introductory email that they can share with their referrals (provided by Convene) <input type="checkbox"/> Follow up with leads received from the website, Sales Navigator, and LinkedIn 	<ul style="list-style-type: none"> <input type="checkbox"/> Monitor LinkedIn replies from referrals & HubSpot <input type="checkbox"/> Access and become familiar with Convene Membership Docs & Pricing <input type="checkbox"/> Arrange to Attend (3) Forum Meetings <input type="checkbox"/> Call Member Candidates to Invite them to the event <input type="checkbox"/> Respond to replies from referrals <input type="checkbox"/> Schedule 90 Intro Calls & 45 Face2Face meetings <input type="checkbox"/> Confirm 15 member candidates to attend the event <input type="checkbox"/> Confirm Member Discovery Event date, time, and location <input type="checkbox"/> Print name tents for Member Discovery <input type="checkbox"/> Schedule 10 Mutual Assessment Meetings <input type="checkbox"/> Send thank you cards or emails to member candidates that attended the event 	<ul style="list-style-type: none"> <input type="checkbox"/> Complete Intro calls and Face2Face meetings <input type="checkbox"/> Continue to return completed referral lists to the Marketing team <input type="checkbox"/> Send completed membership documents to Nolan 	<ul style="list-style-type: none"> <input type="checkbox"/> Confirm 5 fully committed members & 2 anchors for the team <input type="checkbox"/> Schedule intro calls and Face2Face meetings <input type="checkbox"/> Complete Intro calls and Face2Face meetings <input type="checkbox"/> Continue to return completed referral lists to the Marketing team <input type="checkbox"/> Overview of Speakers Program with Nolan <input type="checkbox"/> Review Content Schedule and first month's content