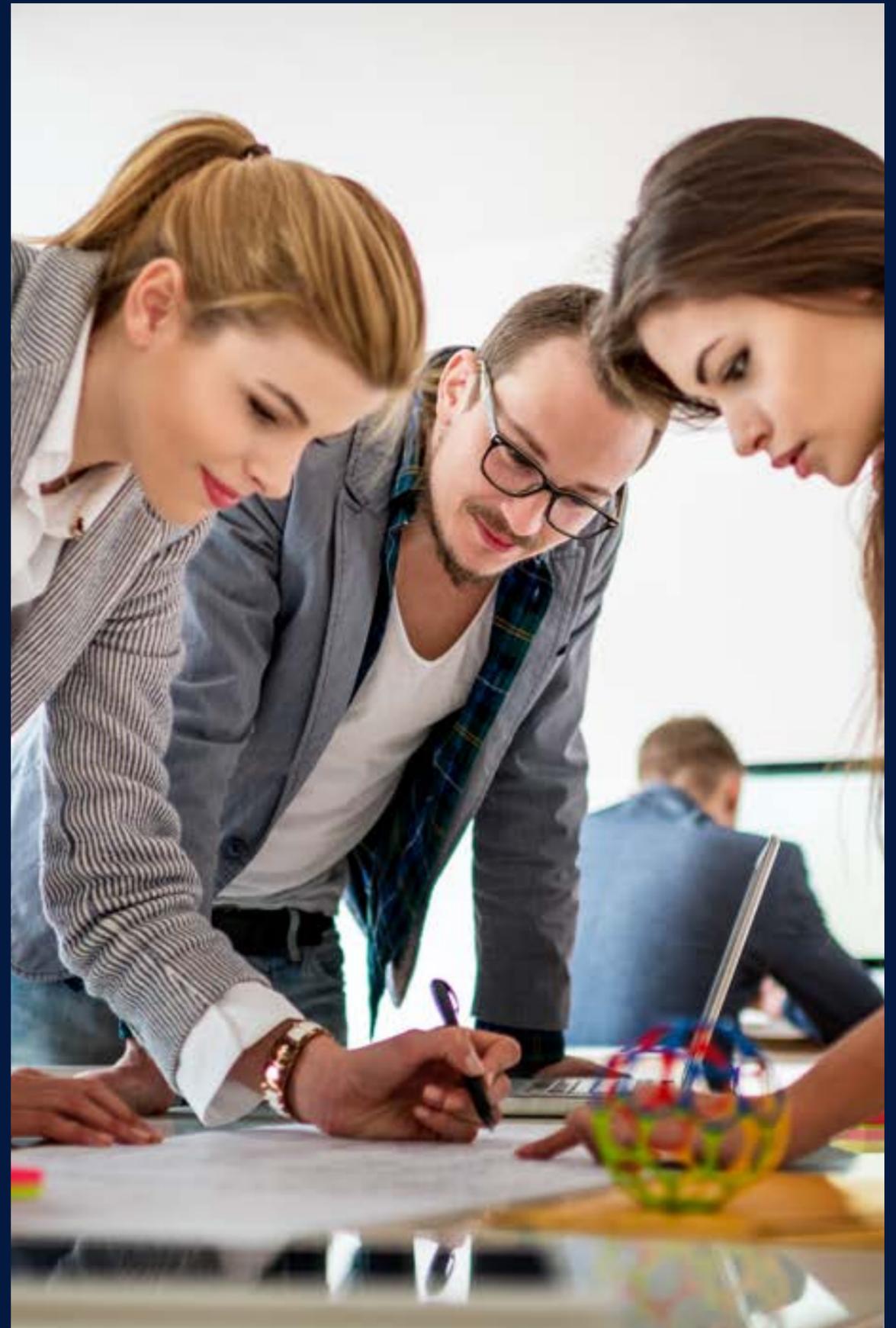


# Mastering Events: The Ultimate Guide for Law Firms



# The Art of Event Planning

Event planning is an art, particularly in B2B legal services, where it resembles a high-stakes chess game. Your law firms aren't ordinary entities but powerhouses delivering indispensable services to large corporations. Hosting an event in this domain goes beyond a mere checklist item; it transforms into a sophisticated dance involving brand perception, client engagement, and a keen focus on business objectives.



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# Setting the Stage: Managing High Stakes and Complexity

Firstly, the stakes are high. Make a mistake at a family barbecue; you might have a few disgruntled relatives. However, fumble an event for a law firm catering to prominent corporate clients, and the repercussions are, to put it mildly, considerably more severe.

Secondly, there's the complexity. Legal events aren't just about managing food and music; they involve navigating precise compliance laws, balancing educational content and entertainment, and striving to deliver an experience that resonates with a discerning, professional audience.

Lastly, let's talk about the clientele. We're referring to Fortune 500 companies and organizations with global brand reputations. Their decision-makers constitute your audience, and how they perceive your event can cascade impact on your firm's reputation and business prospects.

Crafted to be your roadmap, playbook, or secret sauce recipe—whatever term suits you—this guide is tailored for law firms looking to maximize their event success.

Whether you're a seasoned professional or a newcomer to the game, this guide aims to streamline the chaotic event-planning process, enabling you to achieve more with efficiency. From setting objectives to day-of execution and post-event analysis, we've got you covered. We'll also provide templates and checklists because who doesn't love those?

Let's prepare you to be the hero your law firm didn't know it needed. Effective event planning isn't just about logistics; it's about crafting meaningful interactions that drive business and elevate your firm's reputation.

# CHAPTER ONE:

## Identifying the Objective

### 1. Know your 'WHY'

“Imagine this...”

You're all set to organize an event that's sleek, sophisticated, and oozing with professionalism. Everyone's buzzing with excitement, but then someone asks: "Why are we hosting this event?"

Suddenly, the room goes silent, and you don't have an answer.

Amidst the hustle of planning, it's easy to get caught up in the nitty-gritty and lose sight of the primary question: "What's the real reason behind this event?" If you can't sum it up in a sentence or two, it's a sign to pause and refocus on the objective.

***Getting clear isn't a break in the planning process; it's a chance to define the essence of your event.***

Clearly stating the purpose is a guiding light, influencing every decision and detail. It ensures the event is purposeful and aligned with your firm's goals.

## 2. Why Do CLEAR Objectives Matter?

Having a clear goal is crucial when it comes to legal events.

In the complex world of legal gatherings, any path might seem acceptable if you don't have direction—and that's not ideal.

**Without a focused objective, you risk:**

- Wasting time
- Wasting money
- Losing a chance to make a real impact

Whether your aim is client acquisition, showcasing thought leadership, networking, or talent recruitment, your event needs a straightforward objective that can be measured, analyzed, and built upon.

Think of it as having a destination for your journey; it helps you know where you're going and why it matters.

***“According to the Legal Trends Report, 65% of successful law firms implement a structured strategic planning process, emphasizing the significance of goal setting in achieving legal excellence.”***



### 3. Aligning Event Objectives With Firm Goals

Here is the key point...

As a legal marketer in a busy B2B law firm, your events must be a work of collaboration. Your events need to connect with your firm's goals. Think of it this way: your events are part of a larger strategy, not just a one-off campaign.

**Consider your firm's overall goal:**

- Is there a push to enter new markets?
  - *If so, your event could focus on thought leadership.*
- Is your firm more concerned about keeping existing clients?
  - *If so, a client appreciation event might be the way to go.*

Events should act as a strategic tool for maintaining and deepening valuable connections. These experiences should contribute to your firm's overall success.

# CEO TOP TIPS

## What Nexl's CEO Philipp Thurner says...

**Consult Leadership:** Always confer with senior management to ensure your event aligns with the firm's goals.

**Feedback Loop:** Use feedback from past events to refine your objectives. Take note if a past event aimed at client acquisition yielded more value in branding.

**SMART Goals:** Make your event objectives are Specific, Measurable, Achievable, Relevant, and Time-bound. The SMART system is not just project management jargon; it's a proven framework that works.



### SPECIFIC

Clearly define goals so everyone is aligned. Making a specific goal would be to “increase revenue from personal injury cases by 15% within the next six months.”

### MEASURABLE

You should be able to track the progress of the goals and determine their success. In the previous example, a “15% increase in revenue from personal injury cases” can be a success.

### ACHIEVEABLE

Goals should be realistic and attainable with available resources, including time, money, and effort. A goal that is impossible to achieve will only lead to backtracks and failure.

### RELEVANT

The overall objectives of the lawyer should closely align with the goals. For instance, the firm's mission and values may make a goal to increase the number of pro bono cases taken relevant.

### TIME BOUND

Setting smart lawyer goals should have a deadline to track progress and make adjustments. Set a deadline that allows enough time to make progress without delay.



# Setting Your Event Objective

*A Mini-Workbook*

To help you narrow down your objective, answer the following questions:

- 1. What is the primary aim of this event (i.e., client acquisition, thought leadership)?**
- 2. How does this event support the law firm's overarching business objectives?**
- 3. Who is the primary audience for this event, and what do they care about?**
- 4. What Key Performance Indicators (KPIs) will you use to measure the event's success?**
- 5. Who must be involved in this event to ensure it aligns with firm goals?**

*Having answers to the above will give you a crystal-clear understanding of what you want to achieve with your upcoming event.*

*Remember, a well-defined objective isn't just a good-to-have; it's your North Star guiding every decision you make from here on out.*

# CHAPTER TWO: Creating Your Dream Team

## 1. Don't Go Solo, Build Your Dream Team

Event management is a team sport. Why take on the challenge alone when you can create something remarkable with a team?

Assembling a “dream team” with defined roles is essential to fulfilling your objectives, especially when dealing with a high-stakes, niche industry like B2B legal services.

Step one involves finding individuals with complementary skills, like a well-matched orchestra. Define roles to ensure purposeful coordination, not just having people but crafting a coordinated effort.



Define Requirements

Interview Candidates

Select Team Members



***“Orchestrating a game-changing event is not a solo act.”***

**– Philipp Thurner, CEO at Nexl**

## 2. Building Your Dream Team

While it may seem enticing to shoulder the responsibility of managing the event solo, that path often leads straight to ‘Burnout City.’

**Here’s a practical guide to forming your team:**

- **Internal Resources:** Scan your internal departments (i.e., marketing, communications, and business development) to identify individuals with unique skills that can contribute to event management.
- **External Vendors:** There will be times when you require specialized skills that are unavailable in-house. Consider engaging external vendors to fill these gaps.
- **Legal Team Collaboration:** Given the nature of law firms, having a legal team representative is invaluable. Their involvement (while minimal) ensures the team remains grounded in compliance and legal considerations during event planning.

### 3. Defining Your Team Roles

**Project Manager:** Think of them as the quarterback of your team. They orchestrate the plays and ensure everyone stays on track. Their job is to keep the project moving forward seamlessly.

**Content Creator:** This role focuses on crafting essential event materials (i.e., brochures, digital assets, and presentations). They bring creativity and communication skills to the forefront.

**Logistics Coordinator:** The person behind the scenes manages everything from booking the venue to coordinating with vendors. They ensure the event's logistics runs like a well-oiled machine.

**Marketing Specialist:** Charged with overseeing promotional activities. This team member handles social media, email marketing, and public relations. Their goal is to generate buzz and interest in the event.

**Legal Liaison:** This individual is crucial in reviewing contracts, addressing liability concerns, and ensuring all legal aspects are in order. Their focus is on keeping the event compliant and risk-free.

**Finance Officer:** Responsible for managing the budget, handling payments, and tracking financial key performance indicators (KPIs). This role ensures that the financial aspects of the event align with the overall goals.

*By clearly defining these roles, you create a well-structured team where each member knows their contribution to the collective success. It's about fostering collaboration and ensuring that every aspect of your event is covered and optimized for maximum impact.*

# CEO TOP TIPS

## What Nexl's CEO Philipp Thurner says...



**Philipp Thurner • Nexl CEO**

**Clear Communication:** Foster a culture of open communication through regular team meetings, ensuring team alignment and clarity on individual responsibilities.

**Thorough Documentation:** Document tasks, deadlines, and responsibilities comprehensively. Trust me, in the future, you will appreciate the clarity and organization.

**Conflict Resolution:** Have a plan for resolving conflicts and bottlenecks. When many hands are on deck, it's easy for wires to get crossed.

**Conflict Resolution Strategy:** Anticipate and address conflicts and bottlenecks proactively. In a collaborative environment with many hands on deck, having a clear plan helps prevent misunderstandings and keeps things running smoothly.

# Building Your Dream Team

## A Mini-Workbook

Complete the following table to assist you in building your dream team:

<b>Roles</b>	<b>Full Name</b>	<b>Key Responsibilities</b>	<b>Deadline for Tasks</b>
<b>Project Manager</b>			
<b>Content Creator</b>			
<b>Logistics Coordinator</b>			
<b>Marketing Specialist</b>			
<b>Legal Liaison</b>			
<b>Finance Officer</b>			

*Now, you should have a functional team with roles clearly defined. It's time to execute and secure your event victory now that your group is ready, with each team member clear on their role.*

# CHAPTER THREE:

## Mastering Budgeting Techniques



### 1. Practical Approach to Finances

“Money talks...”

Crafting an impressive event for high-profile firms in prominent markets such as New York, Boston, and Washington requires a keen understanding of the financial landscape. The clientele for such events consists of major corporations that demand sophisticated events. The challenge is to deliver a remarkable experience without straining your budget or raising concerns in the accounting department.

Welcome to Budgeting 101— a tailored guide meticulously designed for legal marketers.

In the realm where money speaks volumes, orchestrating an event that mirrors the stature of your clients requires a strategic approach.

*The art of budgeting isn't just about cutting costs.*

Budgeting is about allocating resources smartly to maximize the impact of your event.

Whether you're planning a seminar, conference, or networking event, your financial decisions must align with high-profile clientele's expectations.

## 2. Key Principles of Practical Budgeting

**Prioritization:** List all the essential components for your event—from the venue to marketing materials. Establish clear priorities by distinguishing between absolute necessities and desirable additions.

**Cost Assessments:** Conduct thorough research on the cost of each element, providing estimated figures. Use past events as benchmarks to gauge realistic costs and stay within budgetary constraints.

**Fund Allocation:** Leverage finance software such as Elite 3E or Aderant to streamline the allocation of budgets for each event element. This step ensures a systematic and organized financial distribution.

**Contingency Planning:** Include a contingency budget to account for unexpected expenses. Allocate an additional 10-15% to handle unforeseen costs without jeopardizing the overall financial stability of the event.

**Approval Processes:** Secure all necessary budgetary approvals before proceeding. Streamline this crucial step with tools like ChromeRiver, which facilitates the management of approvals and expense tracking, ensuring a seamless financial workflow.

### 3. Budget Effectively while Maintaining High Standards

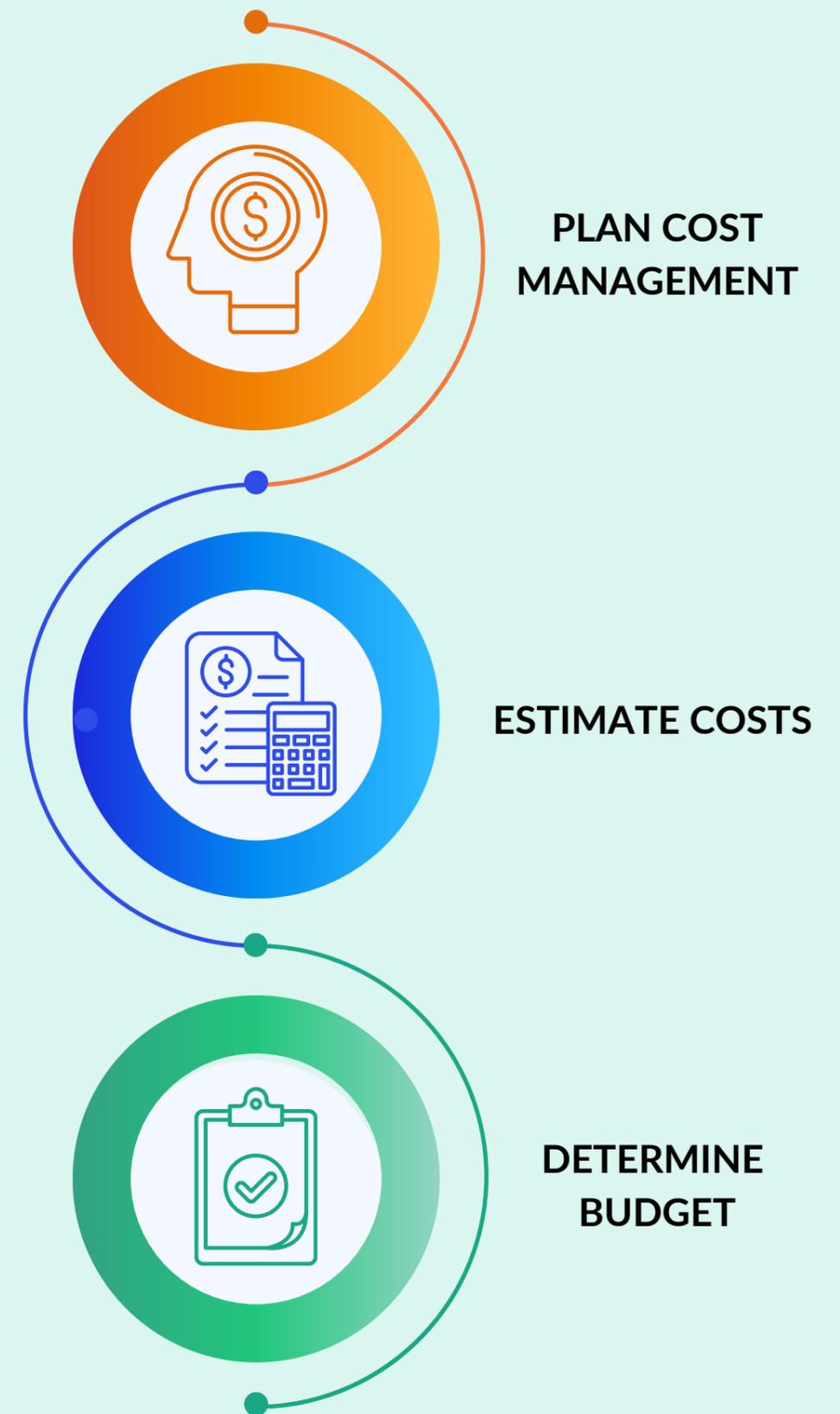
**Negotiation Skills:** Exercise your negotiation skills, as prices for venues and vendors are often negotiable. Flex those skills to secure favorable deals.

**Digital Alternatives:** Evaluate the feasibility of digital materials to reduce printing costs. E-invitations, for instance, can be as elegant as their printed counterparts and often offer increased efficiency.

**Use In-House Resources:** Before resorting to outsourcing, explore what tasks can be accomplished in-house without compromising the quality of the outcome.

**Seek Sponsorships:** To alleviate associated costs, consider securing sponsors for specific elements such as Wi-Fi or coffee breaks.

**Explore Bulk Deals:** When acquiring multiple items from a single vendor, investigate the availability of package deals or bulk discounts to optimize your budget.



# CEO TOP TIPS

## What Nexl's CEO Philipp Thurner says...

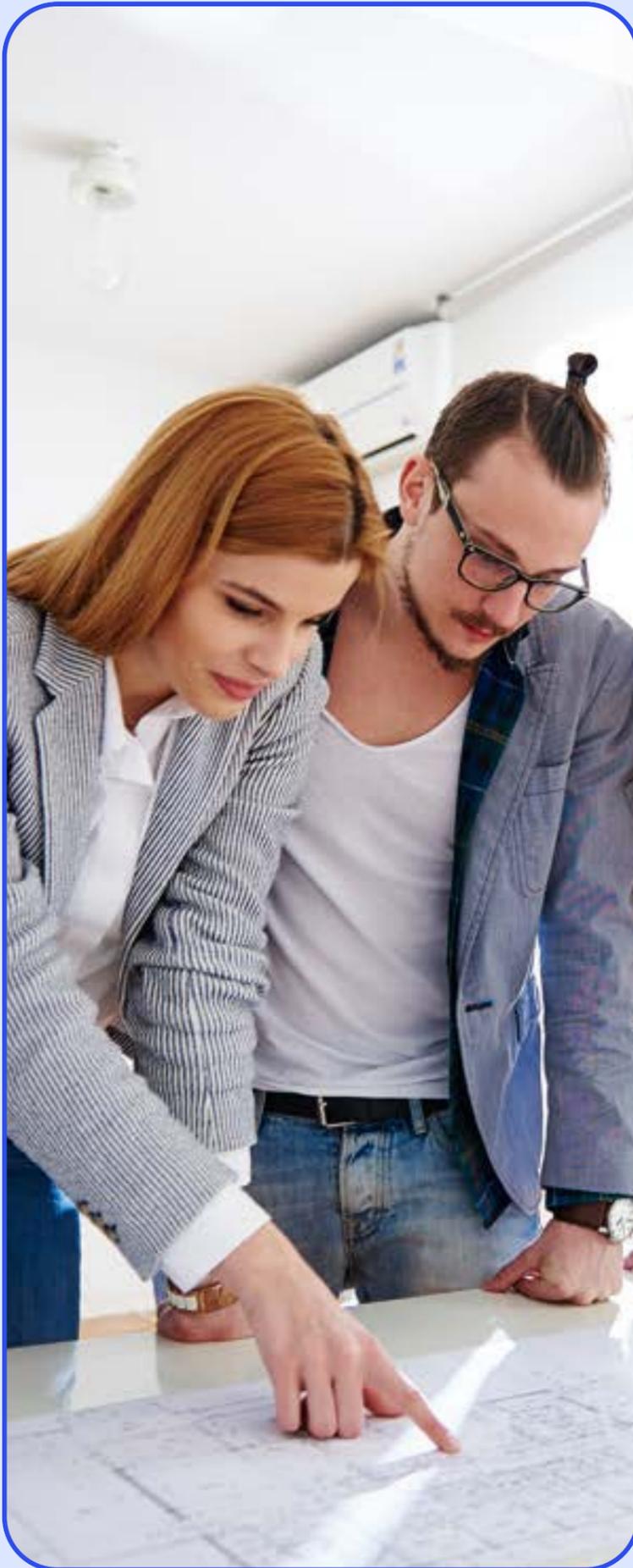


Philipp Thurner • Nexl CEO

**Expense Tracking:** Use software like ChromeRiver to record all event-related expenses meticulously. Tracking will help streamline the approval process and make reconciling budgets a breeze.

**Cost-Effectiveness:** Always consider the ROI of each element. If it doesn't add value proportionate to its cost, reconsider its inclusion.

**Regular Updates:** Keep the finance officer and accounting department in the loop with regular budget updates. No surprises!



# Creating Your Budget

*A Mini-Workbook*

Complete the following table to build a simplified budget.

Event Element	Estimated Cost	Actual Cost	Over/Under
Venue			
Marketing Materials			
Tech or AV			
Entertainment			
Contingency			
Total			

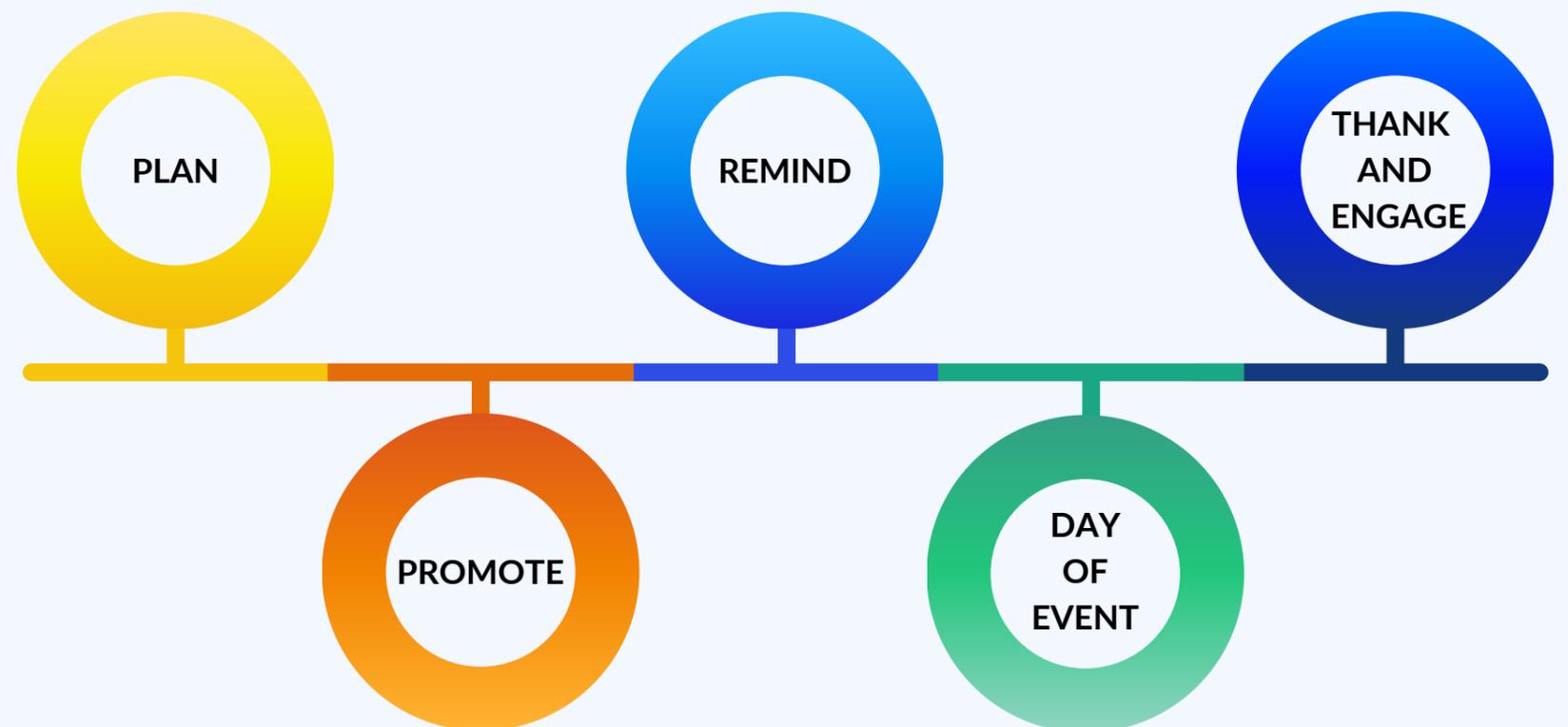
*You should now possess a practical budget that won't cause turmoil in your accounting department. It is crucial to follow your financial strategy as you plan your event.*

# CHAPTER FOUR: Creating An Event Timeline

## 1. The Event Blueprint – Your Strategy

Timelines serve as the foundation for successful events. Whether coordinating an intimate roundtable for crucial clients or orchestrating an annual conference, a well-constructed timeline will guide you to success.

Let's dive into the intricacies of crafting timelines that meet the demands of your unique event and serve as a roadmap leading to triumph. From the initial conceptualization to the execution phase, this comprehensive strategy has you covered.





## 2. Customizing Your Schedule

### **Event Scale and Nature:**

Adapt your timeline based on the scale and type of the event. Large-scale events may demand a 6-12 month timeline, while smaller, more frequent events may only require a few weeks of preparation.

**Event Frequency:** For those organizing multiple events annually, certain tasks such as vendor negotiation or promotional activities may coincide. Utilize this overlap to streamline your planning process.

**Event Adaptability:** Timelines are not fixed; they serve as guiding principles. Always be ready to adjust and pivot as needed.



### 3. The Flexible Schedule - Months

For Large Events (6-12 months out)	
Month(s)	Key Action
6 – 12 Months	Secure venue + Set budget + Form event team
5 Months	Begin marketing + Open registration + Start follow-up plans
4 Months	Finalize sponsors and vendors
3 Months	Start AV checks + Print marketing collateral
2 Months	Send out reminders + Finalize event agenda
1 Month	Send out last-minute promotions + Confirm all bookings + Finalize follow-up plans
Week Of Event	Final run-through + Set-up event space
Day of Event	Execute, and don't forget to breathe





# 4. The Flexible Schedule - Weeks

Follow this basic guideline for your next event management:

For Smaller/Recurring Events (1-3 months out)	
Weeks	Key Action
Weeks 1 - 4	Secure venue + Set budget + Form event team
Weeks 5 - 6	Begin marketing + Open registration
Weeks 7 - 8	Finalize sponsors and vendors
Day of Event	Start AV checks + Print marketing collateral
Week After	Follow-Up with sponsors and new connections

# CEO TOP TIPS

What Nexl's CEO Philipp Thurner says...



**Philipp Thurner • Nexl CEO**

**Hybrid Approach:** Consider physical venue logistics and digital platform setup for hybrid events when crafting your timeline.

**Checklist Champion:** Create actionable checklists for each timeline phase, ensuring everything runs smoothly.

**Team Sync:** Conduct regular team meetings to update the timeline and adjust as needed.

# Creating Your Timeline

A Mini-Workbook

Complete the following table to create your timeline.

Phase	Tasks	Deadlines	Person Responsible
Initial Planning			
Marketing			
Logistics			
Final Preparations			
Day of Event			

*Now, you have a tailor-made timeline. Your timeline is your step-by-step guide to event planning. Refer to your timeline to stay on top of tasks. It's time to take action and bring your plans to fruition.*

# CHAPTER FIVE: Selecting Your Venue

## 1. The Event's Homebase

Selecting the perfect venue goes beyond merely choosing a location; it involves setting the stage for the very essence of your event. However, choosing a venue that seamlessly aligns with your event's objectives and budget is an art.

The decision-making process around your event venue is critical, possibly elevating the experience or becoming a stumbling block. Whether you are orchestrating intimate client-specific gatherings or steering the ship of massive annual conferences, the venue stands as a foundational element.

The venue isn't just a physical space; it's a strategic choice influencing your event's atmosphere, attendee experience, and overall success.

*The venue is the backdrop for your event,  
establishing the tone and expectations.*

## 2. The Must-Consider Factors

**Alignment with Objectives:** Does the venue support your event's objectives? These could be client acquisition, thought leadership, or internal team-building. It is essential to ensure the venue aligns perfectly with what you intended.

**Budget Compatibility:** Revisit Chapter 3 to ensure the venue cost matches your planned budget.



**Size and Layout:** Verify that the venue can comfortably accommodate your attendees and any specific setups, such as breakout sessions, booths, or stages.

**Location:** Factor in the convenience of access for attendees, mainly if your target audience resides in specific cities like New York or Boston.

**Technical Amenities:** Assess the venue's provision of quality audio-visual options and Wi-Fi. These are essential, so ensure they meet your standards.

**Flexibility:** For those planning hybrid events, does the venue offer capabilities for high-quality live streaming?

**Reputation and Reviews:** Pay attention to the experiences of others. Explore reviews or seek recommendations to gain insights into the venue's reputation and performance.



### 3. The Venue Checklist

Ensure that these items are checked off when considering a venue.

The Must Haves		✓	✗
On-site Staff	Is there a dedicated event manager or team?		
Technical Set-up	Are there AV facilities, Wi-Fi, and live streaming capabilities?		
Catering Options	Are there food and beverage facilities or partnerships?		
Accessibility	Is there wheelchair access, parking, and public transport options?		
Contract Terms	Is there a cancellation policy, payment schedule, and any hidden fees?		
Brand Alignment	Does the venue's aesthetic align with your law firm's brand image?		

# CHAPTER SIX:

## Marketing Your Event

### 1. Generating Attention in the Right Places

*Congratulations* on your solid foundation! However, an event without attendees is like a theatre without an audience. It's time to focus on marketing and generate excitement and interest.

By effectively promoting your event, you can ensure it becomes a topic of conversation, particularly within influential legal circles. This essential step will help attract the right audience and make your event successful.

Consider employing a multi-faceted marketing strategy that leverages both online and offline channels. Engage with your target audience through social media platforms, create visually appealing promotional materials, and consider partnering with industry influencers or local legal organizations to amplify your event's reach.

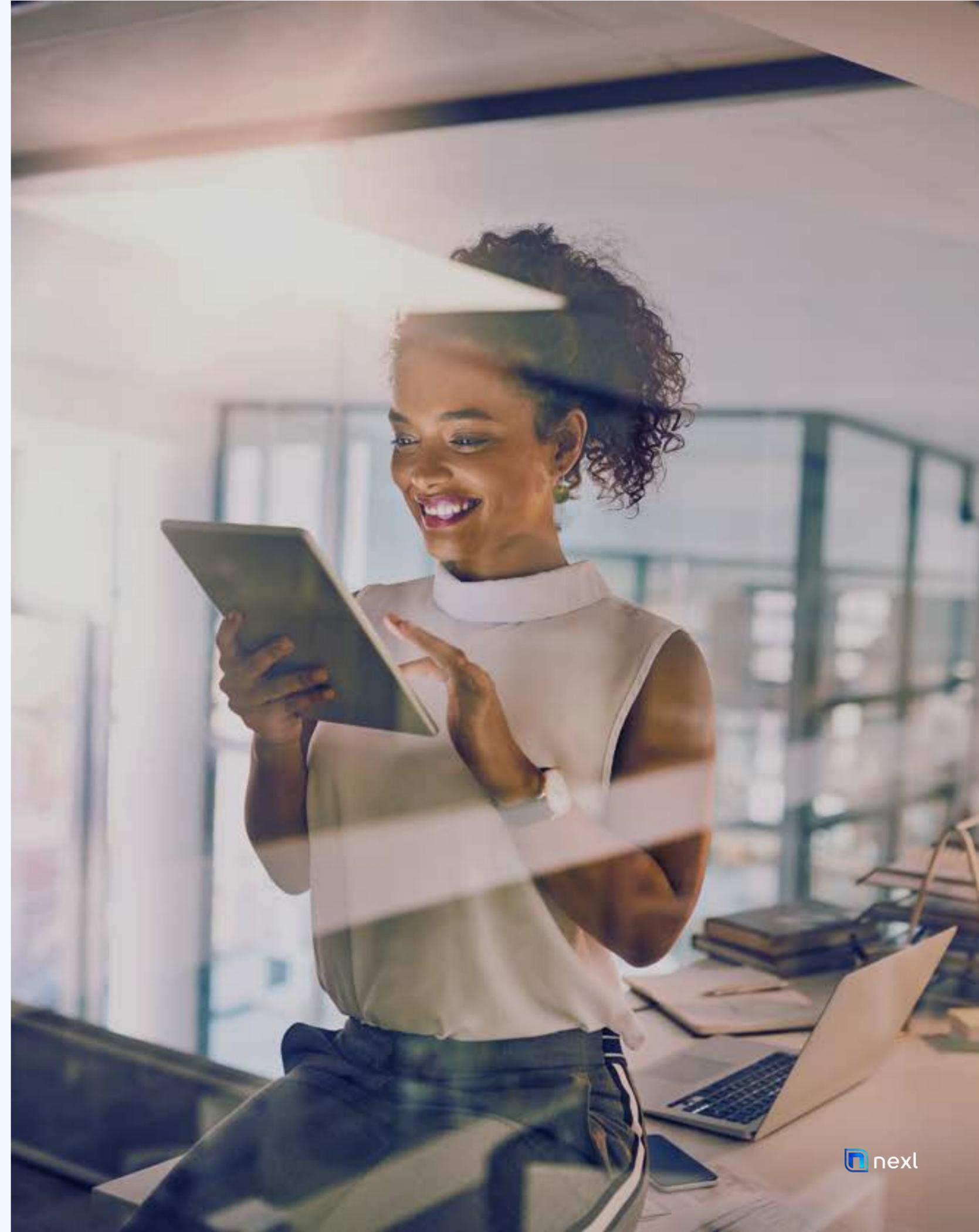
Additionally, take into account the power of personalized invitations and follow-ups. A well-crafted email or direct outreach can significantly impact potential attendees, conveying your event's unique value and significance. The goal is not just to fill seats but to attract the right individuals who align with your event's objectives.

## 2. Building a Landing Page

**Page Components:** Ensure your landing page incorporates vital information such as event goals, agenda, speakers, location, and a compelling call-to-action (CTA) for registration or further details.

**Tracking and Analytics:** Employ tracking pixels to understand visitor behavior and make necessary adjustments.

**AI Support:** Explore the integration of a chatbot, like ChatGPT, to address FAQs and interact with visitors in real-time.



# Crafting the Perfect Event Registration Landing Page

## Advanced Pro-Tip

**Explore the integration of AI tools, including chatbots, and consider advanced solutions like ChatGPT to assist visitors with inquiries. This implementation enables round-the-clock customer service without human intervention, ensuring a seamless experience and minimizing the risk of missing out on potential leads.**

**Keep it Simple:** Avoid overwhelming potential attendees. Maintain a clean design, intuitive navigation, and a crystal-clear call to action.

**Keep it Relevant:** Ensure the landing page focuses on the event theme. Align the content and imagery with your theme.

**Include Information:** Include all essential details—such as a summary of the event, speakers, topics, travel, and accommodations.

**Include Trust Signals:** Incorporate testimonials from past attendees or logos from partnering organizations. These signals instill confidence in potential attendees.

**Optimize Page for Mobile:** Ensure the page functions seamlessly across mobile devices.

**Ensure Seamless Registration:** Streamline the registration form, requesting only essential information.

**Ensure Page is Personalized:** Employ dynamic content to personalize the landing page according to visitor attributes.

**Include a Follow-up Mechanism:** Upon registration, allow attendees to add the event to their calendar. Send a confirmation email containing key details.

### 3. Social Media

#### ***“A Key Amplification Tool”***

**Platform Selection:** While LinkedIn holds significant value for B2B law firms, consider exploring additional channels such as Twitter, Instagram, or specialized legal forums.

**Editorial Calendar:** Strategically schedule posts in the pre-event period, incorporating diverse content formats like articles, videos, and polls to engage your audience actively.

**Advertising:** Use targeted social media adverts to enhance your target audience's visibility.

**Tagging:** Establish an exclusive hashtag for your event to generate anticipation and simplify the tracking of conversations.

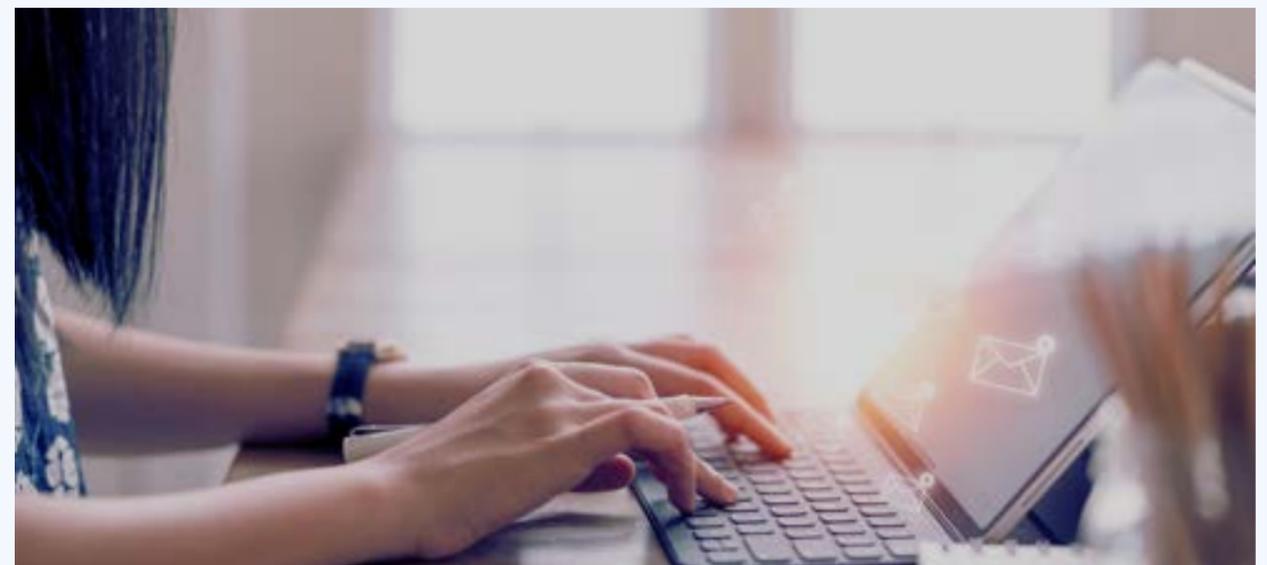
### 4. Email Marketing

#### ***“A Trusted & Proven Tool”***

**Targeting:** Tailor emails according to client lists, past event participants, or specific service interests.

**Email Design:** Develop meticulously crafted email templates that align with the tone and aesthetics of your event.

**Post-Event Communication:** Extend beyond invitations; send timely reminders, updates, and post-event appreciations to maintain engagement with your audience.



# CEO TOP TIPS

What Nexl's CEO Philipp Thurner says...



Philipp Thurner • Nexl CEO

**Multi-Channel Approach:** Use a mix of social, email, and website promotions. This approach allows you to cover a broader range of potential attendees.

**Event Partners:** Leverage any partnerships to cross-promote and extend your event's reach.

**KPIs:** Always track key performance indicators like registration rates, page visits, and social media engagement to understand your return on investments.

# Creating Your Marketing Kit

## A Mini-Workbook

Complete the following table to create a marketing toolkit for your event marketing efforts.

Activity	Platform	Due Date	Person Responsible
Landing Page Set-up			
Social Media Posts			
Email Campaigns			
Performance Tracking			

*You should now have a robust marketing strategy to ensure your event is not just a “well-kept secret.” Leverage technology to your advantage, track your performance diligently, and continuously adapt based on the insights derived from your data.*

# CHAPTER SEVEN:

## Leveling Up Your Event Technology

### 1. Mastering Event Technology

Technology is an essential aspect of event planning and execution. Technology can differentiate between a decent event and an exceptional one.

Exploring the most influential technology tools designed to enhance the organization, monitoring, and overall memorability of events is essential. Nexl, in particular, can be a pivotal asset in your event management toolkit.

Nexl, in its role as a secret weapon, offers unique features and capabilities tailored to streamline your event management process.



*“In today’s world, technology is not merely a luxury; it’s a necessity.”*

– Philipp Thurner, CEO at Nexl

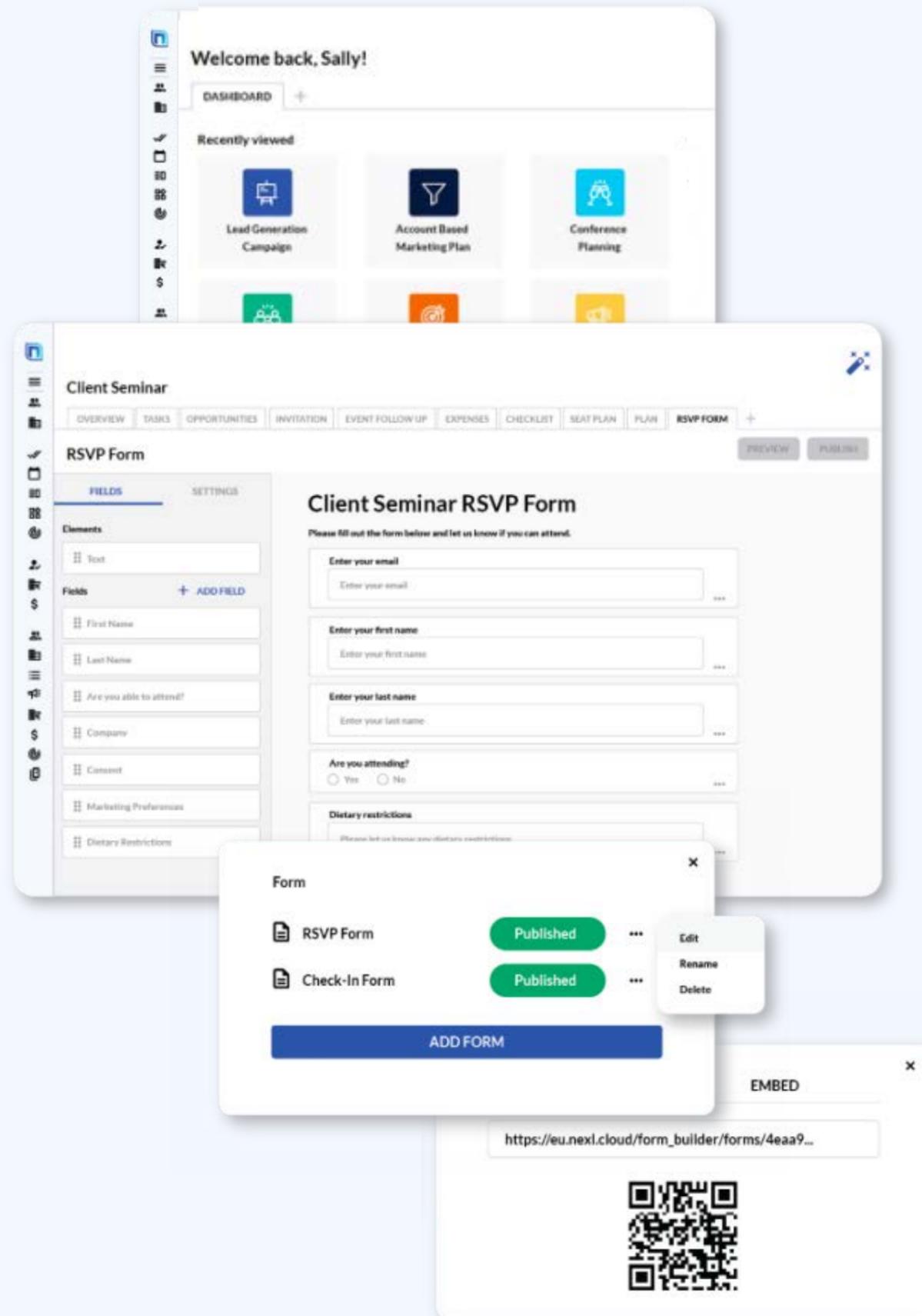
## 2. Event Management Technology

### Project Management Software

While tools such as Asana or Trello excel in task tracking, Nexl's collaborative workspaces elevate the experience. You can set up event-specific workspaces where your team collaborates on every detail, from selecting the venue to managing day-of logistics.

### RSVP & Attendance Tracking

Bid farewell to spreadsheets; Nexl simplifies the entire process. Use Nexl's email marketing tool for sending invites and our custom forms to collect RSVPs. For on-site check-ins, QR codes offer a seamless solution.

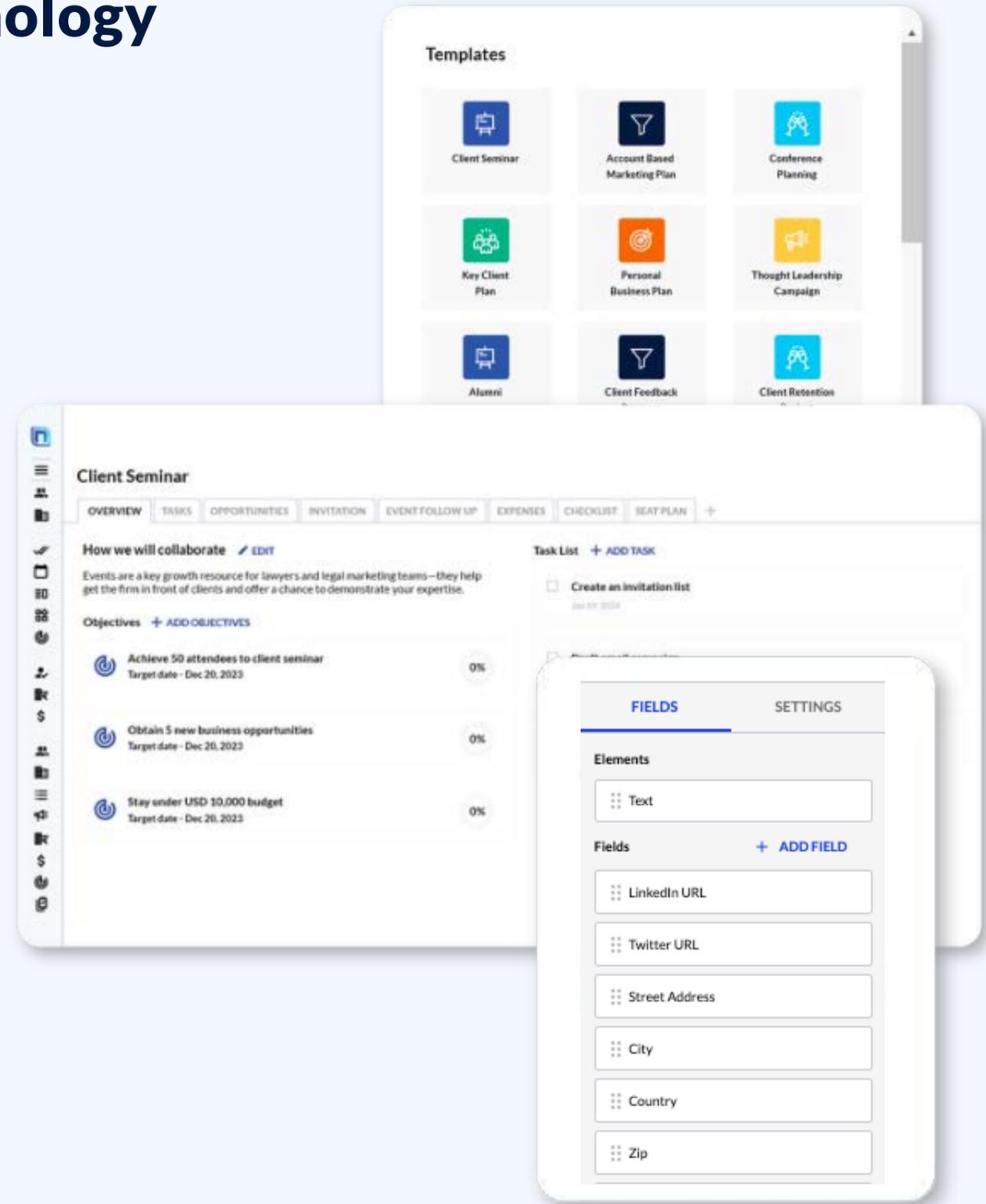


### 3. Event Engagement & Follow-Up Technology

**Live Polling and Q&A Apps:** Promote audience participation with live polling or Q&A sessions. While tools like Slido or Mentimeter can achieve this, Nexl provides integrated options, ensuring centralized management.

**Post-Event Surveys:** Optimize Nexl forms to gather attendee feedback effortlessly. Simplify the process by sending surveys and a thank-you note through Nexl's email marketing system.

**Networking Solutions:** Explore platforms facilitating attendee networking for more significant events or hybrid formats. Nexl's workspaces can seamlessly serve as a dedicated networking zone.

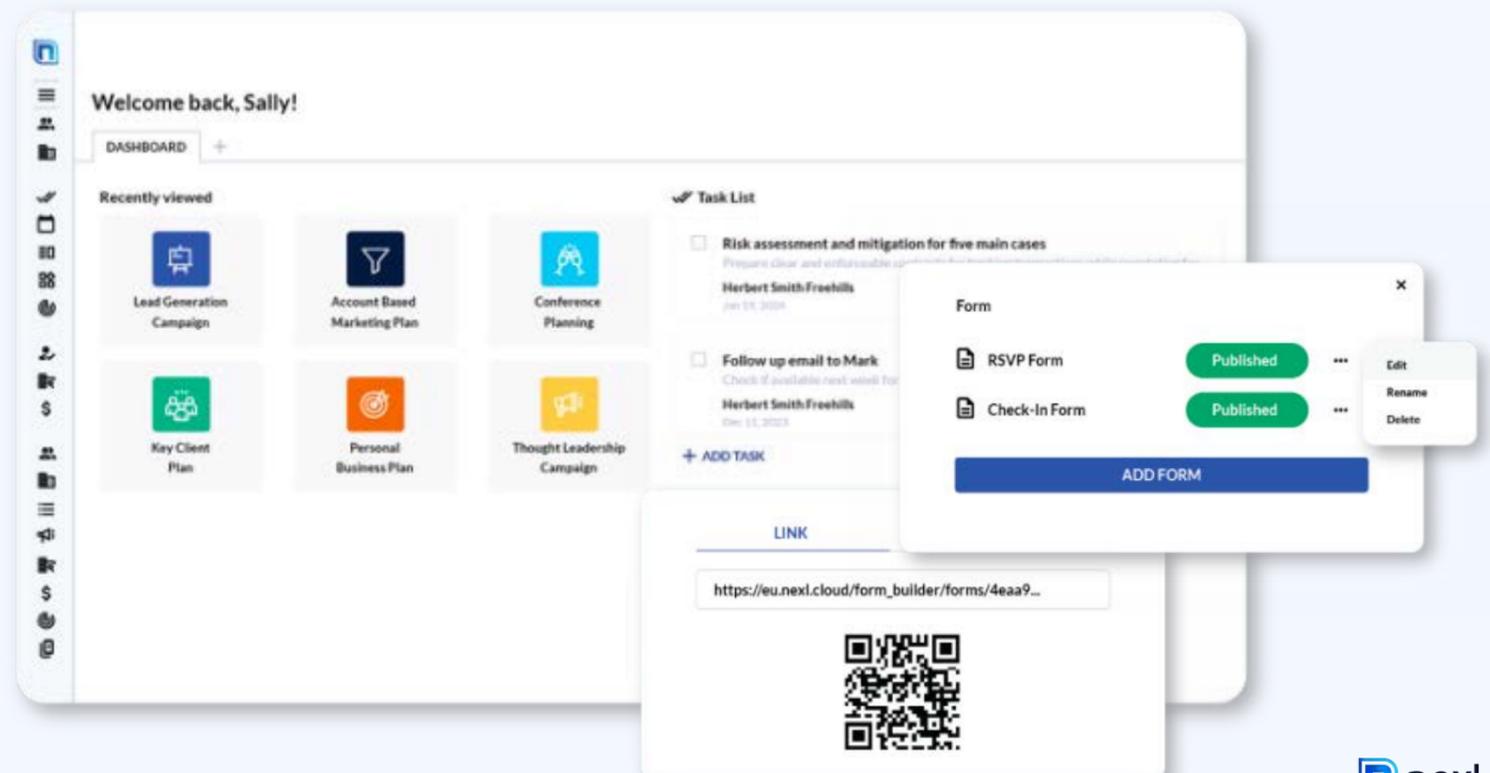
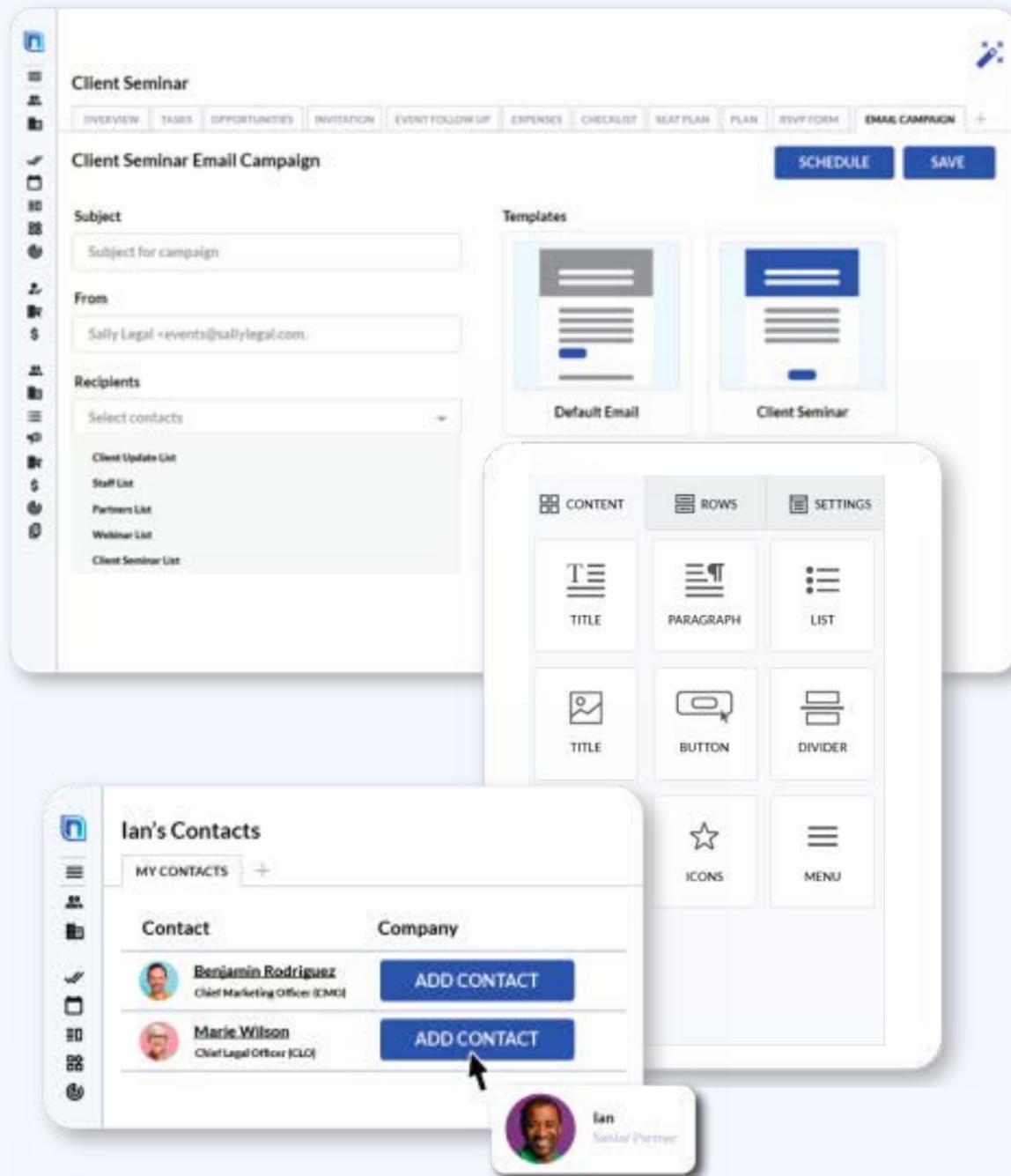


## 4. Nexl Features You Shouldn't Overlook

**Nexl Email Marketing:** Create personalized, highly targeted email campaigns for sending invitations, reminders, and post-event follow-ups.

**Nexl Forms with QR Codes:** Facilitate effortless event registration and on-site check-ins with our streamlined solutions.

**Collaborative Workspaces:** Centralize all your event essentials in one accessible space for the entire team. The option to create event templates for recurring occasions adds a valuable layer of convenience to your workflow.



## 5. Mastering RSVP Tracking & Sign-Up Forms

If there's a potential last-minute stressor, it's RSVPs and attendee tracking. Minor oversights can become a mini-crisis. Let's explore ways to avoid those mini-crises.

The key to mastering your RSVP tracking and maximizing sign-up forms is simply understanding the layout of an effective RSVP form.

*Consider the elements below for your future RSVP forms:*

<b>Full Name &amp; Surname</b>	Always better than just a first name. Helps with organization and personalization.
<b>Company Name &amp; Job Title</b>	Helps you gauge the audience for targeted conversations.
<b>Email Address</b>	Essential for sending confirmations and follow-ups.
<b>Contact Details</b>	For last-minute updates or emergencies.
<b>Dietary Requirements</b>	Crucial for events with catering. More on this at the end of the Chapter.
<b>Event Specific Questions</b>	For example, "What topics would you like to see covered?"
<b>Opt-in for Future Events</b>	Give them the option to stay in the loop for future events

## 6. Event Technology Checklist

Use the following checklist to ensure you don't forget about important aspects of your event technology.



Technology	✓	✗	Purpose	Nexl Feature
Event Management			Collaboration & Planning	Collaborative Workspaces
RSVP & Attendance Tracking			Invites & Check-ins	Nexl Forms & Email
Post-Event Surveys			Feedback	Nexl Forms & Email
Live Interaction			Engagement	Integrated Nexl Options

# CEO TOP TIPS

## What Nexl's CEO Philipp Thurner says...



**Philipp Thurner • Nexl CEO**

**Data Analytics:** Nexl provides insightful data analytics to gauge event performance and attendee engagement. Leverage these insights to enhance the success of future events.

**Integrations:** Nexl integrates with your existing tools, such as ChromeRiver, for expense tracking or Elite 3E and Aderant for financial management. This integration ensures cohesion and an efficient technology ecosystem for your event management.

**Capture Details Seamlessly:** Nexl Forms can capture all of your essential details. You can even set up QR codes for fast, on-site check-ins. Plus, all this data feeds directly into Nexl's email marketing tool for easy follow-up.

**Dietary Requirements:** These are often overlooked details in event management. However, when addressing dietary specifications, meticulous attention to detail is paramount for last-minute updates or emergencies.

# Creating Your Event Checklist

## A Mini-Workbook

Use the following list in your future RSVP forms to ensure that you cover all dietary requirements of your guests.

Religious Requirements	Lifestyle Choices	Allergies/Intolerances	Diet Plans
- Halal	- Vegan	- Gluten-free	- Keto
- Kosher	- Vegetarian	- Nut-free	- Low-carb
- Vegetarian	- Pescatarian	- Dairy-free	- Low-fat
		- Soy-free	- Low-sodium
		- Shellfish-free	- Paleo

Each option can be included as checkboxes on your RSVP form, ensuring you capture all necessary information. Nexl Forms can also allow an 'Other' option with a text box for unique requirements. Learn how [Nexl Forms](#) work and how to leverage them.

# CHAPTER EIGHT: Executing Events Successfully

## 1. The Final Checklist - Event Day

*After investing weeks, and possibly months, into detailed planning, the momentous day has finally arrived. Your event is live, and you find yourself as the conductor orchestrating the event. It's time for the grand finale.*

<b>Venue Arrangement</b>	Ensure an early arrival to oversee the venue's setup according to your specified requirements.	
<b>Technology Check</b>	Thoroughly inspect all technical equipment. Avoid a malfunctioning microphone midway through a keynote.	
<b>Team Briefing</b>	Conduct a concise team briefing to align everyone's understanding. A brief meeting can significantly boost team morale and enhance overall clarity.	
<b>Attendee Registration Desk</b>	Ensure the registration desk is identified and staffed with welcoming personnel.	
<b>Signage Placement</b>	Verify that all signage is both prominently displayed and correctly positioned.	
<b>Emergency Contacts</b>	Compile a comprehensive list. From the venue manager to the AV tech, clearly understand whom to contact for immediate assistance.	

## 2. Handling Curveballs

**Contingency Tech Plan:** Maintain a backup plan for technology. Projectors and microphones can be unpredictable, so having alternatives is crucial.

**Additional Supplies:** Ensure you have surplus materials, including pens, notepads, and snacks, readily available.

**Adaptive Decision-Making:** In the face of unexpected challenges, adopt an agile approach to decision-making. Rather than getting stuck when things deviate from the plan, adapt quickly and proceed forward.

## 3. Managing Your Mindset

You serve as the emotional anchor for your team. If you exhibit stress, it's likely also to impact the demeanor of your team. Regardless of the challenges that may arise, maintaining composure is essential.

In the face of the unexpected, adopting a solution-oriented and positive approach will uplift the team's spirits. Ultimately, in the broader context, minor hiccups won't overshadow an otherwise outstanding event.

### CEO Advanced Pro-Tip

*Use Nexl for On-Site Check-ins. Forget the paperwork. Nexl's custom forms can generate QR codes that attendees can use for instant check-in. Not only does it make the process swift, but it also automatically logs the attendee details and their attendance into your CRM. Efficiency meets elegance.*



Philipp Thurner, CEO at Nexl



# Creating Your D-Day Cheatsheet

*A Mini-Workbook*

Use the following cheat sheet to your advantage. Mark items as complete and include contingency plans.

Task		Contingency Plan (Backup)
Venue Arrangement	✓	
Technology Check		
Team Briefing		
Registration Desk Ready		
Signages Checked		
Emergency Contact List		

*Success and challenges may unfold, but now you're prepared for everything.*

# CHAPTER NINE:

## Standardizing Post-Event Follow-Up

### 1. Creating Your Strategic Game Plan

*Amidst the celebratory aftermath of a triumphantly executed event – with the perfect venue, impactful presentations, and attendees' active participation – a moment of congratulations is in order.*

However, the journey is not over yet—it's time to assess the event's success and tend to the new relationships formed.

### 2. Evaluating Your Success

**Participant Input:** Use post-event surveys to assess attendees' preferences and areas for enhancement in future events.

**Engagement Metrics:** Examine indicators such as session attendance, social media references, and participant engagement throughout the event.

**Lead Generation:** Monitor the number of new leads or potential prospects generated due to the event.

**Return on Investment (ROI):** Evaluate the overall return on investment by comparing costs against the benefits accrued.

**Prolonged Impact:** Over time, actively monitor any emerging opportunities or client relationships from the event.

### 3. The Impact of Personalized Follow-Up

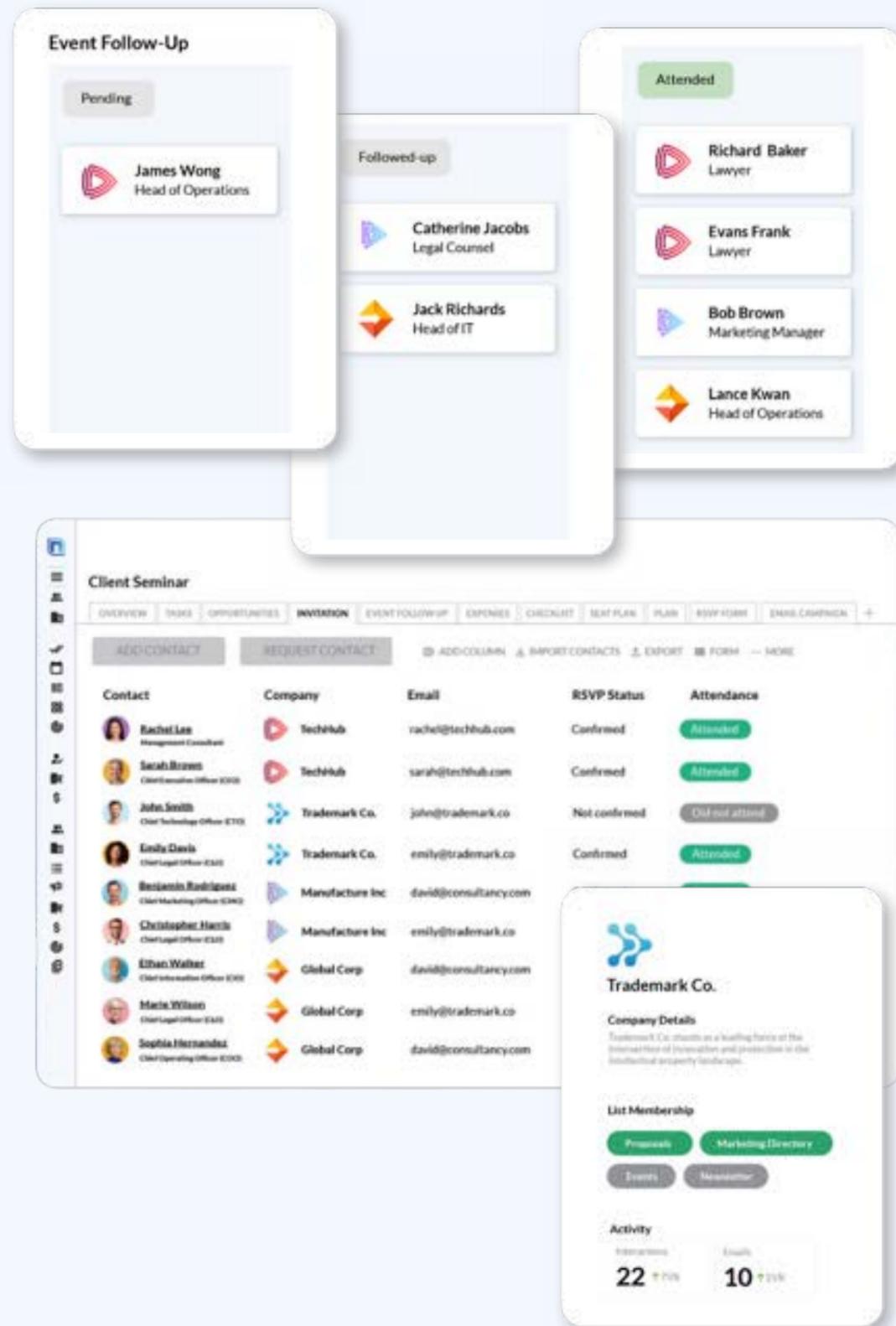
While automated "thank you" emails serve a purpose, they fall short of fostering authentic connections. If you want to foster genuine connections, use *Relationship Insights*.

#### Adopting the Nexl Approach: Leveraging Relationship Insights

Utilizing Nexl, you can identify existing relationships within your firm for each attendee. Ensure the follow-up email comes from someone with a pre-established connection, imbuing it with a personalized and sincere touch.

#### No Access to Relationship Insights? *The Solution is Here*

In the absence of such features, resort to the traditional method. Reach out to partners via email to inquire about existing connections with attendees. Although this approach may demand more time, the dividends it pays in building genuine relationships make it a worthwhile endeavor.



## 4. Establishing Genuine Relationships – It is a Human Thing

Remember that technology functions as a tool to facilitate human interaction. While it aids in managing and organizing processes, the indispensable human touch is vital for establishing genuine relationships.

### - ROI Transcending Metrics: Client Prospects

Your event's actual return on investment extends beyond attendee numbers or immediate feedback. It lies in the opportunities that unfold post-event. A truly successful event paves the way for new client prospects.



*“Building authentic connections is not just a skill; it's a fundamental aspect of our humanity”*

– Ben Chiriboga, CGO at Nexl



# Creating Your Post-Event Action Plan

## A Mini-Workbook

Use the steps below to follow through on your post-event plan of action.

Steps	Description	✓
1. Immediate Follow-up	Dispatch a "Gratitude for Your Attendance" email within 48 hours of the event.	
2. Personal Outreach	Employ Relationship Insights to craft tailored follow-up emails within a week.	
3. Feedback Survey	Distribute a post-event survey to participants within one week.	
4. Data Analysis	Aggregate and assess all feedback and metrics received.	
5. Team Debrief	Conduct a comprehensive team debrief to evaluate successes, areas for improvement, and strategies for enhancement in future events.	

*By prioritizing the immediate outcomes and enduring impact of your event, you are positioning yourself—and your firm—for success. Remember, the event's conclusion marks not an endpoint but the initiation of numerous prosperous relationships.*

# CHAPTER TEN: Managing Event Analytics

## 1. What to Track for Increased Post-Event Follow-Ups

In the fast-paced world of legal practice, hosting events is not just about gathering professionals—it's a strategic opportunity to build lasting connections and foster potential client relationships. To maximize the impact of your legal events, harnessing the power of event analytics is crucial.

Legal events serve as a platform for knowledge exchange, networking, and client engagement. However, their success continues even after the event concludes. The real value lies in the follow-up strategies that nurture connections and convert event attendees into long-term clients. Let's delve into the event analytics that will elevate your post-event follow-up game.

## 2. Key Event Analytics for More Post-Event Follow-ups

**Client Conversion Rates:** Track the percentage of event attendees who converted into clients to measure the success of your events in generating new business opportunities.

**CLE (Continuing Legal Education) Credit Utilization:** Track CLE credit utilization to measure attendee interest in educational content and create targeted follow-up materials.

**Legal Networking Platform Connections:** Track the number of connections made on legal networking platforms after events to measure the success in fostering professional relationships and guide future networking efforts.

**Post-Event Survey Responses:** Collect post-event feedback to improve future events and tailor follow-up communications to meet attendee preferences.

**Social Media Engagement Metrics:** Track social media metrics to gauge the reach and impact of your event beyond physical gathering.

**Legal Case Study Downloads:** Track the downloads and accesses of legal case studies to gauge interest and utilize them for follow-up communications.

**Post-Event Webinar Attendance:** High attendance at virtual/hybrid events can help identify topics of interest, allowing for follow-up webinars or targeted content.

**Post-Event Leads:** Track post-event legal consultation requests to measure attendee satisfaction.

**Follow-Up Email Open and Click-Through Rates:** Track open and click-through rates of follow-up emails to measure their success and gain insights for improving future communications.

**Referral Metrics:** Expand your network and gain new clients by tracking referral metrics after a legal event.

### 3. Revenue Specific Metrics

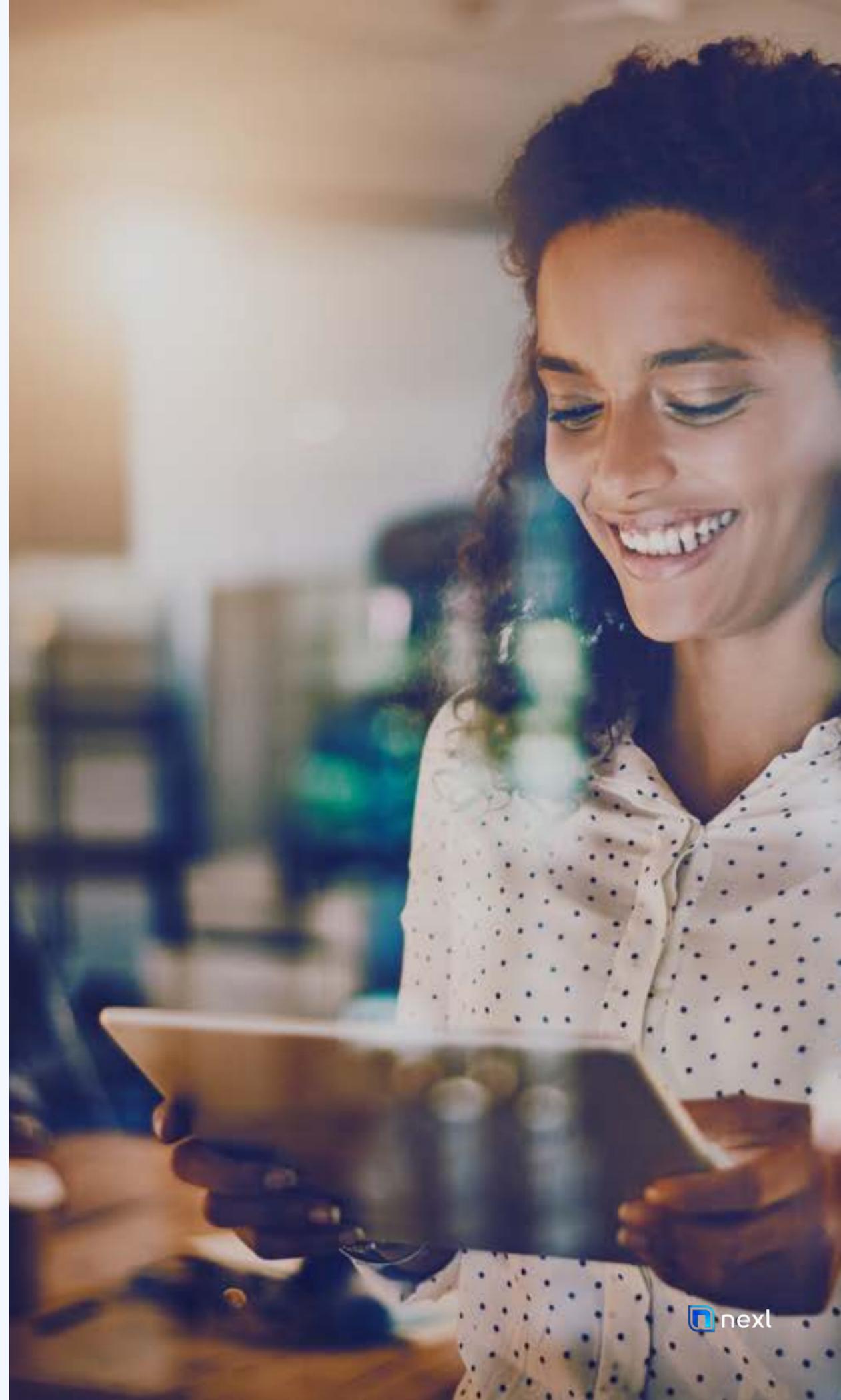
The ultimate goal of post-event follow-ups is to convert connections into revenue and business opportunities. Here's how the tracked metrics contribute to this overarching objective:

**Client Conversion Rates:** Directly correlates to new business generated from event attendees.

**Legal Consultation Requests:** Translates into potential revenue from personalized legal advice sought post-event.

**Referral Metrics:** Indicates the expansion of your legal network, potentially leading to referral-based business opportunities.

**Post-Event Webinar Attendance:** High attendance suggests sustained interest, providing opportunities for additional webinars or services.



## 4. Leveraging Nexl's Event Management Solution

### Pre-Event: List Building and Audience Segmentation

**Focused Engagement:** Easily segment your audience lists to connect meaningfully with the right clients.

**Tailored Communications:** Send relevant messages to the right audience, enhancing your firm's reputation.

**At the Event: Leveraging Technology for Engagement & Effortless Planning:** Event workspaces keep everyone at your firm aligned and organized, making planning a breeze.

**On-Site QR Code Check-Ins:** Swift, secure, and paperless, it's the modern way to welcome attendees.

**RSVP Forms and Tracking:** Gain insights into event registrants, anticipate turnout, and tailor your preparations for the perfect gathering.

**Accurate Preparations:** Knowing the expected attendance helps in planning resources effectively.

### Post-Event Analysis: Enhanced by Segmentation and List Building

Utilizing tools like Nexl Event's Customer Relationship Management (CRM) functionality enhances the efficiency of post-event follow-up. Our CRM includes streamlined and personalized follow-up campaigns through email, offering relevant content tailored to attendees' interests. Furthermore, post-event calls can be seamlessly integrated into the CRM, contributing to building lasting connections.

## Event Analysis Levels

**Event Scoring System:** When initiating the analysis and scoping of an event for Return on Event (ROE), the first level involves using an event scoring system. This traditional approach provides a baseline understanding of the event's potential impact.

**Path-Based Analysis:** To enhance the analysis, introduce a second level focused on paths. These paths involve considering the return from the previous year, providing a more comprehensive view of an event's effectiveness.

## 5. Standard Operating Procedure for Analyzing Return on Events Using Nexl

### Three Dimensions of Analysis

For events attended or similar events, conduct a three-dimensional analysis to assess the impact on return:

**Opportunities Created:** Utilize Nexl to check the number of deals created and their respective values.

**Deals Influenced or Moved:** Cross-reference existing pipeline deals with firms interacted with during the event. Identify how many deals were influenced or moved, mainly focusing on the transition from early to late stage.

**Post-Event Follow-Ups:** Analyze the number of post-event follow-up meetings within the quarter following the event. Utilize Nexl to filter and track the meetings held post-event.

# CONCLUSION

In conclusion, effective event management is a multifaceted process that demands meticulous planning and execution across various channels. By first identifying the event objectives, assembling a skilled and dedicated dream team, and mastering budgetary considerations, you set the foundation for success. A comprehensive event timeline ensures a well-organized and seamless execution while selecting a suitable venue contributes significantly to the overall experience.

Moreover, leveraging the power of strategic marketing, incorporating cutting-edge event technology, and executing the plan with precision all play pivotal roles in achieving desired outcomes. Post-event follow-ups are crucial in maintaining relationships and gathering feedback for continuous improvement. Finally, the integration of event analytics provides valuable insights, enabling you to measure Return on Events (ROE) and refine future strategies.

Successful event management is a dynamic journey that integrates creativity, teamwork, financial acumen, and technological prowess. By embracing a holistic approach, from conception to post-event analysis, you deliver exceptional experiences and lay the groundwork for enduring success in the ever-evolving landscape of event planning.

# How Nexl Can Help Legal Marketers Get More Return on Events

Elevating the event management process to new heights, Nexl's Event Management Solution is a comprehensive and innovative tool that streamlines every aspect of event planning and execution. With features like Event List Building and List Segmentation, organizers can efficiently manage guest lists and tailor communications to specific audience segments. The Registration Forms and form builder simplify the attendee registration process, ensuring a seamless experience for participants.

The Onsite QR Code Check-In enhances event logistics, providing a quick and secure way to manage attendee entry. Event Workspaces within the solution facilitate collaboration among team members, ensuring a coordinated and efficient execution. The Post-Event Follow-Up Automation and Opportunity Tracking feature automates the follow-up process, saving valuable time and ensuring that post-event engagement is strategic and impactful.

Furthermore, the seamless integration with Nexl's CRM and Email Marketing suite empowers organizers with personalized follow-up and integrated marketing campaigns. This synergy ensures a cohesive approach to relationship management and sustained engagement beyond the event. Finally, the inclusion of Event Metrics and Data Reporting provides actionable insights, enabling organizers to gauge the success of their events and refine strategies for future endeavors.

Nexl's Event Management Solution emerges as a powerful ally, redefining the landscape of event management with its feature-rich and integrated approach.

Learn more here: <https://nexl.cloud/solutions/events/>





Nexl is a leading provider of innovative legal technology solutions aimed at creating efficiencies, accelerating growth and providing data-driven insights that enable smart decision-making. We offer scalable solutions for law firms of all shapes and sizes.

Founded by legal professionals with vast experience working within law firms globally, Nexl grew out of a desire to fundamentally change the way that legal firms grow and engage with internal and external stakeholders. The existing way of managing these relationships doesn't work. Today, we're driving the delivery of smart, innovative and technology-driven services to clients worldwide.

Smart, insight-driven solutions underpin Nexl's purpose. Drawing from our own practical experience working within the professional services industry, our purpose is to develop and deliver technology solutions that will drive positive change in how law firms manage their client relationships and grow their practice.

To get started with Nexl, visit us at <https://nexl.cloud> today.

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