Client Advisory Council - Critical Path

25+ Days Before CAC

Create list of people you want at your Advisory Council.

25-30 Days Before

1. Personally call the 10 or 12 clients who make up your Advisory Council.
2. Refer to script provided as a template to get started.
3. Know the details of the meeting ahead of time. Book logistics for event.

20-23 Days Before

Send invitations for the planned event.

14 Days Before

Send confirmation of the event in the mail.

3 Days Before

Call invited clients to confirm their participation.

Event Day - Client Advisory Council.

Post-Event

Complete follow-up process for the Client Advisory Council.