

## Dinner Meeting Instruction Cheat Sheet

STEP 1: Planning	STEP 2: Request a Dinner Meeting with Speaker	STEP 3: Communication
Choose date, time and location.	Go to VTI Resource Portal. Pick tab: DINNER MEETING	Create a list of attendees: <ol style="list-style-type: none"> <li>To begin, go to your <a href="#">SFDC</a> homepage.</li> <li>Navigate over to the top bar and <a href="#">click CONTACTS</a> (to get to doctors that are attached to ACCOUNTS); then go to <a href="#">listing</a> that is your Contact list (i.e. Ron Makelke Contacts)</li> <li>Check all of the <a href="#">people</a> who you want to invite to your event</li> <li>Hit the button that says <a href="#">SEND ENGAGE EMAIL</a></li> </ol>
Create agenda and flow of the meeting.	Go to Dinner Meeting Request with Speaker page	Sending a customized Invitation: <ol style="list-style-type: none"> <li>The ENGAGE screen comes up to an <a href="#">open Email screen</a></li> <li>Select a pre-approved dinner meeting invitation <a href="#">template</a> from the list.</li> <li><a href="#">Customize</a> your invitation with date/time/location.</li> <li>Hit SEND</li> </ol> <p>To Include Leads: Repeat same steps under LEADS view.</p>
Plan a pre-set menu and room set-up ahead of time with the restaurant.	Select your name, phone number and email address from dropdown menus.	Tracking Respondents: <ol style="list-style-type: none"> <li>Go back to your <a href="#">SFDC</a> homepage to your CONTACTS tab.</li> <li>Scroll down until you see a default view entitled <a href="#">Dinner Meeting View</a>. This should give you a view to the status of your invitees.</li> <li>Responses will be shown as <a href="#">Accepted or Declined</a>. If the Dinner Meeting Response column is blank or empty, it means that the doctor has not responded yet.</li> <li>If you would like to <a href="#">send a follow-up email</a>, check the boxes next to the names and click SEND ENGAGE EMAIL to put you back into the ENGAGE Studio. Once there you can choose to send a new email invitation.</li> </ol>
Plan the guest list.	Complete dinner meeting form and <a href="#">SUBMIT</a> .	Have a great meeting!