total benefit communications™

an ascensus® company

Do's & Don'ts for Successful Events

DO'S

- ✔ **Check the TBC website** as soon as you receive your assignment for specific instructions on who to reach out to prior to the meeting.
- ✔ **Contact our client** via email or phone after checking our website. The contact may send you any materials, instructions or conference call information. Should you not hear from the contact within 24 hours after reaching out, let us know.
- ✔ **After contact the site** to introduce yourself and finalize the directions, parking, a/v needs, etc. You must talk to someone at the site to confirm the event.
- ✔ **Introduce yourself to employer as representing their plan with our client** (i.e. UHC). While we don't want to mislead anyone to think we are employees of the client, we do want to present a unified face to the employer.
- ✔ **Ask about equipment.** When speaking to the site, confirm what technical equipment is needed for the meeting. Be sure you are prepared with the proper AV equipment prior to arriving at the site.
- ✔ **Prepare for the meeting at least 3-5 business days** prior to the meeting to ensure you have all the necessary information, documentation and travel.
- ✔ **Arrive at least 30 minutes early.** You should use this time for set up, meet the site contact, and greet the attendees. This will allow you time to verify that all materials have arrived as well as make certain everything is in order.
- ✔ **Be professional** and emphasize your experience. This may be your first meeting for TBC, but no one should know.
- ✔ **Be confident** in your knowledge by being overly prepared. If you are uncertain about any issue or product, email us for clarification. We don't want you to go to an event uncertain or confused.
- ✔ **Email us ASAP** to inform of any meeting changes or special requests not previously communicated by TBC. If a decision must be made immediately and you are able to meet the request, please do so then let us know.
- ✔ **Communicate to the client** after the event any questions, concerns, issues, changes, etc.
- ✔ **Submit your expense report within 2 weeks** of the assignment. Failure to do so can result in forfeiture of all expense reimbursements as well as nonpayment of consultant fee.

DON'TS

- ✘ **Give your business card out** or solicit anyone for any reason. This includes inquiring about job opportunities (for yourself or others), recruiting or offering your professional services. Doing so is a terminable offense - no warnings.
- ✘ **Give any recommendations or advice** including legal, accounting, investment or tax guidance. This applies not only to 401(k) plans, but also to HRA, HSA, FSA, etc.
- ✘ **Pass judgment** on the pros/cons of any plan, benefit, product, etc. Every plan you represent is a benefit to the employee and must be respected.
- ✘ **Offer comparisons** with another company or service provider. (What is offered is confidential to that situation.)
- ✘ **Wait until the day before the meeting to prepare**. Many times the materials you need to prepare for the meeting will take a few days to obtain.
- ✘ **Identify yourself as a financial planner** or registered representative for securities as you are not registered with the client you are representing.
- ✘ **Bring anyone with you** to the meeting without prior approval from us.
- ✘ **Not smoke at the event at all.** Especially H&W events as we have smoking cessation often as an offered part of the plan.
- ✘ **Do not be on your phone** or bring reading material. This makes you less approachable.
- ✘ **Disclose confidential information** to any third party.

As a professional, we know you want to do a great job. Following these tips will go a long way in making that happen. Please remember you are acting on behalf of our client, the service provider. Based on your efforts, we have established an outstanding reputation, but we're only as good as our last event.