



EVENT OUTREACH CHECKLIST

Created by Montage Marketing Group, LLC.

STEP 1: IDENTIFY A POINT OF CONTACT

☐ My existing contacts (people or organizations I know):

NAME	ORGANIZATION	EMAIL/PHONE
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
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☐ My potential contacts (people or organizations I would like to know):

NAME	ORGANIZATION	EMAIL/PHONE
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TIPS FOR SUCCESS:

- Consider companies, organizations and thought leaders that are most relevant to your project/event.
- Use search engines and LinkedIn to find appropriate contacts where you don't already have them.
- Narrow your results using search terms that describe your target audience; ex. Latino community organizations in CITY, STATE.

STEP 2: MAKE A CONNECTION

☐ Reach out to a point of contact via email or over the phone.

EMAIL

- ☐ Introduce myself
- ☐ Introduce the opportunity
- ☐ Include links for legitimacy
- ☐ Request follow-up conversation

PHONE

- ☐ Introduce myself
- ☐ Introduce the opportunity
- ☐ Request follow-up conversation
- ☐ Confirm contact information
- ☐ Send links, additional details via email

☐ Follow-up call scheduled for: _____

STEP 3: ASSESS THE FIT

☐ Capture partner needs, priorities and conflicts.

NEEDS

PRIORITIES

CONFLICTS

TIPS FOR SUCCESS:

- Be patient. Arrange further conversations to ensure all parties are represented, aware and in consensus.
- Don't be deterred by potential conflicts. Problem solve with your partner to identify opportunities of mutual benefit.

☐ Mutually-beneficial opportunities include:

STEP 4: SPREAD THE WORD

☐ Provide promotional materials.

- ☐ Newsletter article template
- ☐ Blog post template
- ☐ Press release template
- ☐ Social media messages

☐ Handouts

☐ Other: _____

☐ Other: _____

☐ Other: _____

STEP 5: KEEP IN TOUCH

☐ Identify future opportunities to connect.

OPPORTUNITY

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

TIPS FOR SUCCESS:

- Opportunities to connect include: checking in ahead of an event; answering questions and troubleshooting issues; and celebrating as milestones are met.
- Inform partners of future opportunities in their community or areas of interest.