How to run a successful event

All you need to know about showing your farming clients how to get the very best from Xero and Figured.
The benefits of running your own event

Events are a great way to build stronger relationships with clients, and help to educate them en masse about topics that affect them – such as government legislation and industry changes. Events allow you to connect with people on a level you can’t achieve online or over the phone, and the face-to-face interaction helps to hold people’s attention.

This guide includes some of the resources you need to host your own Xero event. We hope to help make the planning and execution of your event as easy as possible.
Planning the perfect event
Pick the right date, time and place

Farmers are busy people with demanding jobs. They are more likely to attend an event that’s easy to get to and fits with their schedule. Set yourself up for success by picking a venue and time that works for them.

KEY THINGS TO CONSIDER:

1. Bear in mind the farming seasonal calendar. Ask your farming clients what day and time best suits them as they will have to consider caring for their livestock and daylight hours.

2. Pick somewhere central and easy to access. Your office might work if it’s in a central location. Otherwise, for more rural locations, you could ask if you could host your event at a client’s farm so it’s easier for them, and neighbouring farmers in the community, to attend.

3. Make sure your venue has:
   - Minimum and maximum capacities that suit your target attendee numbers
   - Tables and chairs for your guests to sit at during the event
   - AV connectivity capabilities
   - Catering facilities if possible (a biscuit and coffee always goes down well)

4. Make a list of anything you need at the venue e.g.
   - AV equipment – projector, screen, mics, electric points/extension cords
   - Staff to help with event registration and welcoming your guests
Visualise your event

Consider the flow of your event and set up the venue to reflect the timing, audience and your overall vision.

1. Visit the venue to get a first-hand look at what your guests will experience.
2. Consider your layout. We suggest theatre style with a small stage area at the front where you can present.
3. Ask if there are any venue quirks, things you need to hire, and who from the venue will be on hand to help on the day.
4. Make sure you’re clear on what’s provided in the cost, and how long you have the venue for.
5. We suggest allowing some time for drinks and mingling after the event. Make sure the space you use has room for this.
6. If it’s a morning event, a light breakfast and coffee works a treat on arrival.
7. Check the temperature and sound in the room. Music is a welcome addition if guests are mingling.
Involving your clients

We recommend hosting between 10 and 20 guests. This can be more intimate, allowing guests to feel confident in asking questions to learn more.

CHOOSING YOUR CLIENTS

Whether you are looking to onboard new clients to Xero and Figured, or hoping to give your existing clients a masterclass in Xero and Figured, the presentation material we have provided can be adapted to meet your clients’ needs.

TRACKING REGISTRATIONS

Online event tools like Eventbrite are useful for tracking registrations. And most are free as long as you’re not charging for tickets.
Create a winning invite

Form a list of farming clients within a reasonable distance and create your invitation. Use the invitation email templates and email banners in our event toolkit – or you could create your own. Your invite should tell your clients everything they need to know and, of course, look beautiful too. Remember to keep it simple.

Send them by email and make sure you capture all the relevant details at registration:

- The purpose of the event and why they’d benefit from coming
- The day, date, time and location
- When RSVPs are due
- Tips on how to get there, such as the nearest public transport stop and where to park
- Whether they can bring a guest and to provide the guest’s name in the RSVP
Promote your event

We’ve included social tiles for you to use that can be downloaded from the Xero webpage. Using these is a great way to reach lots of people quickly and easily across a range of different channels.

**YOU COULD ALSO TRY:**

1. Asking colleagues to share social tiles on their personal LinkedIn
2. Calling or emailing your current client and prospect lists
3. An ad in the local newspaper or business magazine
4. Inviting current clients to bring a friend
5. Providing an incentive to refer another business
6. Flyer drops in local areas and to local businesses
7. Targeted digital display advertising

The more people who are engaged with the event the better. Depending on demand, you could host multiple events.
Presentation and content

We’ve included your agenda and all the content needed for you to successfully host your event. All you need to do is **update the template slide** to introduce your practice and your event presenters – easy!

Running a Xero and Figured presentation is a great way to help your clients understand how online accounting software can really help them. Highlight the key features and benefits that they’ll love, or consider taking your clients through a live demo of Xero and Figured so they can see just how simple it is.
Suggested event agenda

Keep your event under two hours to keep your audience captivated.

- Arrival and welcome coffee
- Scene setter – introduce your practice, Xero and Figured
- The future of farming and how your role as the accountant has changed
- The benefits for them
- Product demo and show client case study
- Questions
- Wrap up drinks / coffee
Dress your event space and order collateral

Showcase Xero, Figured and your business with professionally designed marketing collateral. We’ve produced flyers that you can hand to your clients at the end of the event to remind them of the benefits of using Xero and Figured. Plus, make sure to dress your event space with our eye-catching roller banners to bring the event to life.

You can view our flyers and roller banner [flyers and roller banner here]— if you would like to order these for your event, please email agri-events@xero.com.
Do a test run

We’ve provided speaker notes in the presentation to help guide you through. Ensure everything goes to plan by practicing before the big day. This will help you feel confident, identify any issues, and give a good sense of how long things will run.

MAKE SURE YOU:

☐ Practice your presentation and ask for honest feedback.

☐ Know what materials and equipment you need and check that everything works.

☐ Make a note of how long everything should take.

☐ Make sure you have pens and a system in place to collect registrations and book follow-up appointments.

☐ Make a plan for early and late arrivers.

☐ Confirm speakers, helpers etc.

TECH TIPS:

☐ Do a test run before the real deal – it’ll help iron out glitches.

☐ If giving a demo on a computer, hardwire the internet rather than relying on WiFi. If you have to be on WiFi, try a connection that is only being used by you.

☐ Save the WiFi password and pop a copy of your presentation on your desktop.

☐ Keep a copy of your presentation on the desktop of your computer to protect against potential WiFi issues.
At your event
Top tips for a memorable event

- Check the room temperature, music and equipment.
- Go over your run sheet and make sure your staff and catering are good to go.
- Give out name tags to help people get familiar with each other.
- Mingle, mingle, mingle.
- Provide food and drink to your guests before any speakers or activities.
- Follow up conversations by taking details or booking appointments.
- Take a moment to gather your thoughts before your presentation.
- Check in on guests to make sure they’re comfortable and have what they need.
- Thank people for attending and remind them to keep in touch.
Adding a personal touch

NETWORKING AND ONE-TO-ONE DEMOS

We suggest networking time at the end of the event to allow for clients to ask questions. Having a space with seats, tables and laptops for one-to-one demos can be a nice touch. This way you can show the product in greater detail and start the conversation about getting set up with Xero and Figured.

KEEP THE MOMENTUM GOING

You’ll want to make sure you leave your clients with a call to action. What do they need to do next? How are you going to follow up? Let them know you’ll be in touch or ask them to contact you at a time that suits them. Have a schedule available so they can choose a time to book in with you then and there.
Follow up and convert

Whether they turned up or not, people who’ve shown interest in your event are great prospects.

BE SURE TO:

1. Send a ‘thank you’ email to all attendees and include useful information and resources for them to take their next steps – have a look in your event kit
2. Follow up individual conversations, aiming to lock in meetings to discuss next steps
3. Provide useful information and resources in response to any questions from the day
4. Send ‘no-shows’ a note to let them know they were missed and share any helpful information
5. Make everyone feel welcome to contact you anytime
Enjoy your event