

CHECKLIST: HOST A REGIONAL USER GROUP MEETING

This checklist is your guide for planning and executing a successful regional user group meeting. If you have questions, contact Meghan Vaughn at 406.585.3632 or Meghan.vaughn@rightnow.com

What is RightNow's Role?

- Help promote your meeting through posts, e-mails, phone calls, and internal communications
- Order and pay for catering
- Arrange RightNow technical contact to attend meetings, gather feedback, and help answer questions
- Provide a meeting kit with name badges, note books, pens, etc.

CHECKLIST – HOST/FACILITATOR DUTIES

Schedule and Post Event (6 weeks before your meeting)

- Pick a meeting date/time
 - Tips:
 - Schedule you meeting on a Tuesday, Wednesday, or Thursday.
 - Avoid scheduling next to a holiday or holiday weekend.
 - Have a half-day event. If you are in a busy area, consider starting your meeting later in the morning to give people time to travel through traffic.
 - Consider tying your user group meeting to another event (e.g. Product Release Webcast or Expert Seminar to participate in the event as a group).
- Reserve a conference room (for food and 20 – 50 people, depending on your region)
 - Confirm availability of internet connectivity, laptop, and projector
 - Tip: for small groups, use a conference table or U-shaped room setup. For larger groups use tables and chairs
- Post the Event in your Regional User Group calendar (See “Schedule a RightNow Regional User Group Meeting” for instructions). You’ll need to provide:
 - Meeting date/time
 - Meeting Location (address and conference room)
 - Shipping address and contact
 - Parking directions (e.g. parking garage, visitor parking, public transit)
 - Check-in / Security directions (if applicable)
 - Internet availability
 - Catering option(s)
- RSVP to your meeting



Develop the Agenda (3 weeks before your meeting)

- Download the user group agenda template (See “User Group Agenda”)
- Create your agenda
 - Review sample user group agendas
 - Solicit discussion topic suggestions on your event
 - Encourage interaction with introductions, roundtables, show and tells, and breakouts
 - Include time for introductions and for planning your next meeting
- Send email reminders to anyone scheduled to present during the meeting
- Add the agenda to your event

Prep for Meeting (1-2 days before your meeting)

- Review Best Practices for RightNow Regional User Groups
- Receive the RightNow package with event materials (e.g. name badges, agendas)
- Double-check that room has the necessary A/V equipment and internet
- Optional: Gather company schwag (e.g. pens, notebooks, magnets) to give to attendees

Host/Facilitate (day of your meeting)

- Set-up meeting room (e.g. sign-in sheet, door signs, agendas, space for food)
- Receive catering order
- Introduce yourself and explain your role as the customer host
- Moderate/facilitate the meeting—keeping it on time and facilitating customer discussions
- Capture specific details for the next meeting (e.g. date, time, customer sponsor, agenda topics)

Follow-up (day after your meeting)

- Post an event summary/meeting minutes in your regional user group’s event. Suggested content includes:
 - Number of attendees
 - Summary of meeting/discussion topics
 - Attach copies of presentations
 - Details for next user group meeting
 - Ask for feedback on how to improve the next meeting
- Have suggestions for improving the RightNow User Group Program? Contact Meghan Vaughn at 1.406.585.3632 or Meghan.vaughn@rightnow.com .

Thanks!

Thank you for hosting a regional user group meeting. These events are by customers, for customers, and your participation is a key to your regional user group’s success.