

# How to Prepare for a Customer Training Event

Valued Partner,

Thank you for hosting a training event with Microscan. Customer seminars or lunch and learn events are a great way to present new products to multiple users at your key customers.

Microscan supports these activities by packaging everything you need to promote, host, and present a training session with your customers in a Training Event Kit. Resources are provided in template form for you to easily download and print or email to your customer base, including customizable print-outs, email, and an educational presentation created by a Microscan subject matter expert.

We encourage you to tailor the resources to meet the goals of your seminar, workshop, or lunch & learn. While there is no right or wrong way to host a customer event, we've prepared a How-To-Guide to help you make the most of your event.

Need some assistance or suggestions? We're here to help so please contact [partners@microscan.com](mailto:partners@microscan.com) for support.

Best regards,

The Microscan Marketing Team

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## STEP #1:

### Determine the customer group or audience of your event

Think about your target audience and how you plan to position your business and product lines.

**60 days  
before the event**

### Establish your event strategy.

Create a short list of the objectives you want to accomplish with this seminar.

- Who do I want to attend this event?
- What is the goal for number of attendees?
- Why am I hosting this event?

### Plan out logistics

- Who will present the material?
- What demos do I want at the training?
- Do I need any large signage pieces or backdrops?
- What will I do to promote my event?

## STEP #2:

### Set the date, time and location of your event

You can host events in your office, at a local hotel, or at the customer site. Some Partners have been successful hosting half-day events at a local club or private meeting space. Book your meeting space early to avoid conflicts. If you are including lunch, make arrangements at your venue or with a local caterer. Talk to your venue about the best layout for your space (classroom, U-shape, crescent rounds) based on the content you're presenting.

**45 days  
before the event**

### Create your online event registration

We recommend [Eventbrite](#) as a free online registration tool. Just fill in your event details for an event URL you can share with your customers via email, or social media. Manage registration and track results from the site.

### Secure necessary items for your event

1. If you plan to request event funds assistance for your training event, complete a [Marketing Resource Request Form](#) and email to [partners@microscan.com](mailto:partners@microscan.com) before your event. More details are available about the [Marketing Funds Program](#) on the Partner Alliance website.
2. Remember to order a Product Demo Kit on the [Microscan OMS](#) to ensure you have the tools you need to lead your training event.



## STEP #3: Invite your target audience

Use the email template included on the on the [Training Events Kit Page](#) to invite your audience to the event. Make sure to add your logo and fill in your specific event details. You can use a raffle, free lunch or other tools to make sure your attendance is high.



## Other ways to reach your target audience

Get more exposure and let your customers know about your event via social media (Facebook, Twitter, Google+, LinkedIn and others). Be sure to include your registration link so interested parties can sign up to attend.

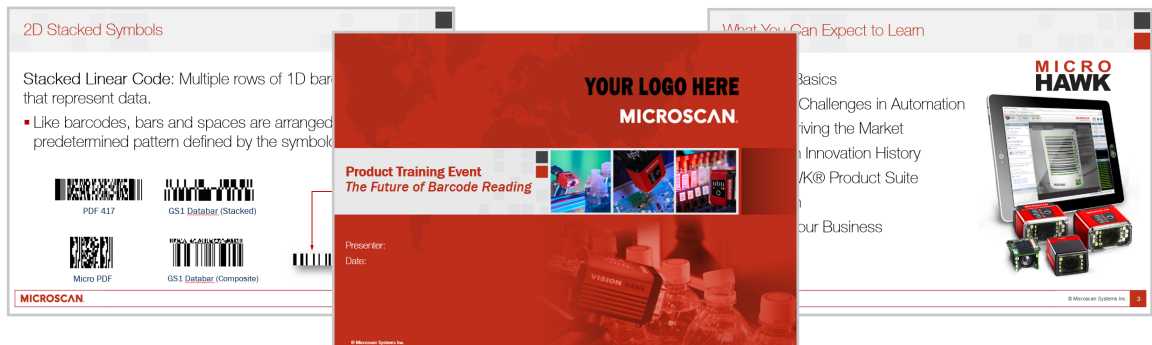
**30 days**  
before the event

## STEP #4: Confirmation and preparation

Confirm guest attendance and venue logistics. Send an email confirmation to your registered attendees. Reminders help ensure high participation.

Download and prepare event materials. We've included resources on the [Training Events Kit Page](#) that you can easily download and customize to your particular event date and time. Revisit your seminar objectives from Step 1 and make any necessary modifications to your agenda. Remember to test the demo equipment, review your material, and practice your presentation skills.

**15 days**  
before the event



## ▶ **STEP #5:** Final details

Email the agenda and reminder one last time to your attendees. Gather all necessary materials. You may also want to bring give-away items with your logo on them.

### **Print out event materials.**

Print the agenda, venue signs, and name badges that are included on the [Training Events Kit Page](#). Remember to bring extra blank name badges. [FedEx-Kinkos](#) makes it easy to print out your documents. Just send them the digital file and they will print & ship documents anytime, anywhere.

## ▶ **STEP #6:** Have a great event!

Make sure your venue looks polished. Post event signage, set up your registration area with sign-in sheet and name badges, and the classroom with with attendee training materials.

Take lots of pictures and videos! Microscan would be happy to share your activities in our social media channels.

## ▶ **STEP #7:** Follow up

Email a quick thank you note to each of your attendees, thanking them for their participation. Remember to list any follow-up action items.

Send back event recap to Microscan at [partners@microscan.com](mailto:partners@microscan.com).

1. Let us know how your event went! Description of attendees, comments on the meeting format, and audience response and engagement, and what could have made it better are especially helpful for us to know.
2. Email photos & videos from your event so we can share on social media.
3. Scan and email back the sign-in sheet.
4. If you requested marketing funds for your event, the sign-in sheet must also be emailed to [partners@microscan.com](mailto:partners@microscan.com) after the event to receive credit to your Microscan account.

**2 days**  
before the event

**DAY OF**  
your event

**1 day**  
post-event

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