Acumatica The Cloud ERP

LUNCH & LEARN

After signing up to host, follow this comprehensive checklist to stay on track and deliver a standardized experience. Highlighted documents are located in the Toolkit online at LunchandLearn.cloud.

T- 3 WEEKS +

☐ **Review Virtual Details with the Acumatica Support Team.** Within 48 hours of submitting your Sign-Up Form, a member of the Support Team will reach out via email. They will check in on any outstanding questions and you should do the same.

☐ **Set up your Video Conference Bridge.** We highly recommend using your own conference bridge technology so you can have full host-control and ideally are familiar with the platform.

  ☐ **If using YOUR OWN technology:** Schedule the web meeting with the appropriate time and date. Once complete, send an email to support@lunchandlearn.cloud with the appropriate log-in instructions (e.g.. meeting URL, meeting ID, password if required, etc.). The Support Team will add this information to the Confirmation Email attendees receive after registering.

  ☐ **If using Acumatica's RingCentral:** The Support Team will setup the meeting and include the dial-in instructions and meeting ID in the Confirmation Email. The Confirmation Email is what attendees receive after registering. Reference the RingCentral Instructions from the Materials Toolkit to familiarize yourself with the process.

☐ **Registration Confirmation and **Registering YOURSELF****
After confirming meeting details, the Support Team will setup your Lunch & Learn registration on Cvent, where attendees will register.* As soon as you have confirmation, via email, from the Support Team that your event is live (they will send you the URL), register yourself. Enter all of your information as normal EXCEPT YOUR LAST NAME. In the Last Name Field enter "Host."

☐ **Start Recruiting Prospects.**

  ☐ **Outreach Asset Download: Email Invitation Template.** Use this to begin email outreach by editing CUSTOM TEXT and adding YOUR LOGO before sending.

☐ **Begin Receiving Registration Reports Weekly.**
Every Wednesday, the Acumatica Lunch & Learn Support Team will email Registration Reports containing names and emails of those registered. If you are in need of a Registration Report earlier, please email support@lunchandlearn.cloud; the team will respond no later than one business day.

T- 2 WEEKS +

☐ **Continue Recruiting Prospects.** Use email, social media, digital advertising, word-of-mouth, etc. You should be within 50% of your expected attendance goals, knowing you will drop-offs.

  ☐ **Outreach Asset Download: Social Media.** Edit the TEXT and add YOUR LOGO before posting.

  ☐ **Outreach Asset Download: Ad Banners.** If running Ads, use the graphics provided.

T- 1 WEEKS +

☐ **Host Material Asset Downloads.**
Review the below. Ensure you are PREPARED to deliver the Demo.

  ☐ **Agenda Guidelines.**

  ☐ **All Video Assets, Demo Script,** and **Presentation.** Rehearse and customize by adding your LOGO

T- 3 DAYS

☐ **Receive Automated Email Reminder and Send Personalized Email to Attendees.**
Attendees will receive a reminder, you will too. We recommend follow-up calls to ensure participation.

☐ **Receive Registration Report.**
The Acumatica Lunch & Learn Support Team will email you a report 3 Days prior to your event. Create a meeting invite directly on your calendar and invite all registered attendees. Within the email, include: **1)** the video bridge instructions for dial-in and **2)** Attach the The **How To: Grubhub instructions.** Let them know you are looking forward to seeing them online and that they'll receive an email from Grubhub the day before the event with their lunch credit, reference the instructions for any questions.

T- 1 DAY

☐ **Receive Registration Report and Email from Grubhub.**
The Acumatica Lunch & Learn Support Team will email the report. Use THIS list for Check-in during your event. Your lunch credit will come via email directly from Grubhub.

☐ **Finalize Video Bridge Technology.**

    ☐ **Familiarize yourself with the platform.** Make sure any downloads are on your computer.
    ☐ **Locate your headset/headphones.** The best attendee experience is when a host is speaking through a dedicated microphone.

EVENT DAY

☐ **Log-in to the Video Bridge Meeting.** Remember to do this a minimum of 10 min prior.

    ☐ **Test your audio levels and video connection.**
    ☐ **Test the screen-share function.** Pull up your presentation deck to confirm slides are advancing. Leave the Opening slide up so attendees are greeted with a visual upon entry to the meeting.

☐ **Greet Attendees and Manage Check-in.**
Use the Registration Report sent to you the day prior to check-in all attendees and add any new prospects. It is your responsibility to know who attends, record this, and report back to Acumatica.

☐ **Follow Lunch & Learn Agenda Guidelines.**
Keep the event running on schedule. Thank attendees!

    ☐ **Welcome & Thank You.** We highly recommend using your camera during both the opening introduction and closing thank you. This is important as it establishes a personal connection with prospective customers since you are not shaking hands with them in person.

T+ 1 DAY

☐ **Receive Automated Thank You Email and Follow-up with Personalized Thank Yous.**
Registered attendees will receive a thank you email. You will receive one too, which is your trigger to follow-up one-on-one with a call-to-action that moves the selling process forward.

☐ **Send your final Registration Report, in Excel, to Support@lunchandlearn.cloud for program reporting.**

☐ **Sign Up to Host Your Next Lunch & Learn.** Submit new dates and locations on the website Sign Up Form.