

Client Entertaining

How do you host a memorable client appreciation dinner? **Evan Thompson** shares the little details involved



You may do a lot of client entertaining and enjoy spending time with them outside the office. And you may find that client social events are a great way to know them better and deepen your shared relationship.

However, many advisors (and clients) are happier keeping their relationship on a business level and aren't concerned about socializing with one another.

Then the winter holiday season arrives with all its festive cheer. It's a time that almost demands some gesture of thanks to clients for their support and business throughout the past year — and ideally into the next. For many advisors, suddenly spending quality time with clients in a social setting can present challenges.

Some advisors have virtually unlimited options for client appreciation events tailored to suit their guests' interests, however eclectic or expensive. They often face a fine line between being too generous with their entertainment choices and may lead some frugal clients to ask, "Am I paying my advisor too well? Do other clients get the royal treatment?" And if the entertainment is too modest, they might respond, "Does my advisor *really* appreciate my business?"

You don't need to provide a Sir Richard Branson-like experience to top anything your competitors may choose to stage. Your entertainment choice should rest on the depth of your relationship with your client, your financial ability and most important, your personal comfort level.

Just as they assess the way you manage their financial affairs, your guests will notice your attention to the smallest

COMMUNICATIONS

detail. Here are some tips to keep in mind when planning top-notch client events.

- Choose a setting that offers excellent value for dollar, accessibility, privacy, service, and a reliable and friendly site contact within an atmosphere conducive to conversation.
- If you bring one support staff member to the event, consider bringing all your employees so no one feels left out. This is a great chance for your team and clients to get to know one another and become more than another account or voice over the phone.
- Meet with restaurant management in advance if you are hosting five or more guests. If there are fewer guests, a telephone call to review table placement, menu selection, and other details (such as parking vouchers) will do. It is also wise to meet the manager and get a sense of the surroundings, including bathroom locations, parking facilities, and payment procedures.
- Give careful consideration to the guest list, and the event goals. Will you prepare welcoming comments? Is the event held to honour a special guest?
- Extend personal invitations by telephone and email within three weeks of the event date. Two or three days before the event, confirm with your guests and re-confirm with the restaurant. If some guests are from out of town and don't know their way around your city, send them a link to the restaurant's website. They may wish to investigate it ahead of time.
- Arrive early to ensure things are proceeding as planned and that you have the table you selected.
- Perform your greeting and seating duties with grace and confidence. Determine seating in advance. Ensure guests have the best view of the room wherever your table is located, either toward a window or the centre of the restaurant.
- Allow your guests to make their own selections of alcoholic beverages, and number and type of courses, within their chosen price range. For larger groups, it is appropriate for you to simplify this process by selecting the menu and beverages in advance. In the invitation, consider offering two main course options (vegetarian or non-vegetarian) along with a section in which they can identify food allergies or other special food requirements.
- Initiate conversational topics suited to your audience. Avoid controversial topics and opinion sharing or challenging a point of view put forward by a guest. Use humour carefully, avoid telling jokes and don't criticize public figures, sports franchises, politicians, or other entities that could spoil the event.

- When choosing beverages for larger groups, allow for one bottle of wine per guest. For example, if there are 10 guests, you could order three sparkling wines, three reds, three whites, and one dessert wine. If you are having a reception beforehand, consider offering beer and wine only. Or, issue drink tickets (one per guest) if you feel cocktails need to be offered.

- If you have colleagues present, avoid confusion by telling them before the event that you will cover the bill. Arrange to pay the bill ahead of time. Provide the owner or host with your credit card information over the phone or by arriving early on the day of the event. When you arrive, pre-sign the receipt and add a tip for the waitperson. Attach a business card that includes your full mailing address, phone, and email to the receipt at that time. Request that the final receipt be sent to you.

- Consider engaging a professional communications and business etiquette coach to help everyone put their best foot forward.

You are best qualified to judge whether your clients would feel comfortable joining you, members of your team, and other clients for some holiday cheer. Whether you select a sit-down dinner or make a donation to a charity in their name, let your instincts guide you in thanking clients for their trust in you at holiday time. 🍷

EVAN THOMPSON is a business relationship and personal branding expert, writer and head of Toronto-based Evan Thompson and Associates. Evan can be reached at evan@evanthompsonandassociates.com or @CSuiteProspects on Twitter.

ALCOHOL AND YOUR LIABILITY

As a host, you and the restaurant need to monitor guests' alcohol use to protect them and yourself. If you see a guest becoming intoxicated, quietly suggest they move on to sparkling water or another non-alcoholic beverage. You might say, "The evening is just starting, why don't you take a break for awhile?"

Offer cab slips to guests who you feel cannot drive safely. Avoid issuing cab slips at the beginning of the evening as you could unintentionally encourage guests to become "over-refreshed."

Employers are legally required to guard workers and clients against unreasonable risks in public and private places, just as bars have a duty to protect their customers [*Jacobsen v. Nike Canada Ltd.*, [1996] B.C.J. No. 363 (B.C.S.C.)]. — *E.T.*