



"Informal" Event Check List

Agent Name: _____ **Date:** _____

Company: _____

Venue: _____

Event Setup

	Yes	No
Sales agent arrived 30 minutes prior to the event.		
Informed event personnel of their arrival.		
Was the event easy to access and location clearly marked?		
Table display was visually professional		
Distributed material:		
a. Business cards		
b. Business reply cards		
c. Tri-folds		
d. Sales material		
e. Scope of Appointment form		

Consumer Interaction

Agent identified themselves as a sales agent.		
Agent was prepared to speak with consumer.		
Agent was respectful to the consumer.		
Agent used the correct material, per CMS guidelines		
Agent stayed the designated amount of time.		

Comments: _____

Reviewed by: _____

Date: _____

Agent: _____

Date: _____

