CLASS CONFIRMATION PROCESS

Someone has registered for your class. Great! Now what?

RETIREMENT
E L E V A T E D

STEPS	WHO	WHEN	WHAT
1 **Send an automated "Thank You for Registering" email.**	**OUR TEAM**	Immediately upon registration	This email states that someone (your team) will be calling to confirm their registration.
2 **Make confirmation phone call.**	**YOUR TEAM**	Within 1 business day	During this call, confirm the date, correct email address to receive email confirmations, # of guests, and obtain mailing address if not already provided. Let them know you will be sending their RSVP packet in the mail (recommended).
3 **Mail RSVP packet.** (Email RSVP if preferred or close to start of class.)	**YOUR TEAM**	Within 2 business days of registration	There is a sample confirmation letter in the EA Resource Portal (emerging-advisor.com) that you may download and customize. We strongly recommend adding any driving directions, maps, special parking instructions, instructor bio, and any other items you would like to include in this packet.
4 **Send an automated "1-week prior" reminder email.**	**OUR TEAM**	1 week prior to the first day of the registrant's class	If the person has cancelled, please use the live cancellation link to remove them from receiving additional emails from our team. If the person has rescheduled to another date within the same campaign, it is important to communicate that with our team, by inserting a comment into your live registration spreadsheet.
5 **Make reminder phone calls.**	**YOUR TEAM**	1-2 days prior to the first day of each class	This is a quick reminder call to confirm date, location and time. We also suggest you confirm they received the packet and ask if they have any initial questions. Reminder calls for two-evening classes are very helpful in ensuring attendance. The second-evening call should include a reminder to the participants to bring their book to the second evening of class.
6 **Send a "Day of Class" reminder email.**	**OUR TEAM**	The morning of class (before 8am)	This final email states the date, time and location of the class as well as includes a Google map link.