



1 IDENTIFY EVENT DATE

Knowing your event date is key to establishing the timeline of events that must go into play for selecting the ideal speaker. It is important that you provide this information to start the process. We capture this info only once and it will flow through to your contract and event summary.

GO INTO THE GDA CLIENT PORTAL AND CREATE AN EVENT:
Log onto Client Portal
Go to Speaker Request
Click on Create Event

2 PROPOSAL PHASE

- You (or your GDA Agent) can now search the portal and add a speaker to your Proposal.
- The Proposal can be viewed via the portal or an email link provided to you by GDA.
- You can forward the link to others in your organization.

Use the Thumbs Up and Thumbs Down button! Thumbs Down will move the speaker to the lower right hand of your proposal and you will be asked for further details. You can always add them back. This information helps us build your sales intelligence.

When we are down to one speaker, you can click a button that says **Start Agreement**.



2 PROPOSAL PHASE

3 CONTRACTING PHASE

We will build an agreement that reflects all of the speaker requirements and the details of your event.

The agreement will be sent to you via **DocuSign**. Once signed and returned we then send the speaker agreement to the speaker. Sometimes negotiations continue during this phase. When all points are in alignment, we will countersign the agreement and return to you an executed contract.



4 POST-CONTRACTING PHASE

If you have questions up to 60 days prior to your event, please reach out to your GDA Agent. At 60 days, our Event Management team will reach out to you to begin working on logistics. You can update the event summary by using your client portal. You can also access your contract and invoices via the client portal. If your event is less than 60 days out you will move straight to the Event Management stage.



5 EVENT MANAGEMENT

5 This phase finalizes the event summary (The Play Book). We aim to get you and the speaker a final copy two weeks prior to the event. If you have any documentation that might brief the speaker on any details, please provide. Final payment is due prior to the event.



6 PLAY DATE

Lights...camera...action....
We will remain available at the time of your event whether it's in-person or virtual ~ to provide support as needed.



7 DEBRIEF

We will send you a survey that allows you to give feedback on the speaker and GDA. We will also call you to discuss your input and other events you have on the horizon.



7 DEBRIEF