



EVENT PLANNING TOOLKIT

LP Event Preparation Template

Prepare with intent. Capture the signal. Own the follow-through.

EVENT NAME

DATE(S)

LOCATION

INSTITUTION / TEAM

ATTENDEE(S)

01 Objectives and priorities

OBJECTIVE 1

EVIDENCE OF SUCCESS

OBJECTIVE 2

EVIDENCE OF SUCCESS

OBJECTIVE 3

EVIDENCE OF SUCCESS

02 Priority sessions and conversations

SESSION / CONVERSATION	WHEN / WHERE	PRIORITY	DESIRED OUTCOME	OWNER



EVENT PLANNING TOOLKIT

LP Meeting Preparation

03 Prepare each conversation

Meeting 1

PERSON

INSTITUTION

TIME / LOCATION

WHY THIS CONVERSATION MATTERS

QUESTIONS TO ASK

MEETING NOTES

DESIRED NEXT STEP

Meeting 2

PERSON

INSTITUTION

TIME / LOCATION

WHY THIS CONVERSATION MATTERS

QUESTIONS TO ASK

MEETING NOTES

DESIRED NEXT STEP

Meeting 3

PERSON

INSTITUTION

TIME / LOCATION

WHY THIS CONVERSATION MATTERS

QUESTIONS TO ASK

MEETING NOTES

DESIRED NEXT STEP



EVENT PLANNING TOOLKIT

LP Meeting Preparation

03 Prepare each conversation (continued)

Meeting 4

PERSON

INSTITUTION

TIME / LOCATION

WHY THIS CONVERSATION MATTERS

QUESTIONS TO ASK

MEETING NOTES

DESIRED NEXT STEP

Meeting 5

PERSON

INSTITUTION

TIME / LOCATION

WHY THIS CONVERSATION MATTERS

QUESTIONS TO ASK

MEETING NOTES

DESIRED NEXT STEP

Meeting 6

PERSON

INSTITUTION

TIME / LOCATION

WHY THIS CONVERSATION MATTERS

QUESTIONS TO ASK

MEETING NOTES

DESIRED NEXT STEP



EVENT PLANNING TOOLKIT

LP Event Debrief and Follow-up

04 Event notes and debrief

KEY TAKEAWAYS

MANAGER / MARKET SIGNALS

PORTFOLIO IMPLICATIONS

PEOPLE AND CONNECTIONS

05 Follow-up tracker

PERSON / INSTITUTION	FOLLOW-UP ACTION	OWNER	DUE DATE	STATUS