



PARTNER OVERVIEW FOR ONBOARDING

Lunch & Learn Event Series: A turnkey program to accelerate your pipeline velocity and increase your revenue

CONTENT

About

- Overview
- Goals and Objectives
- Roles and Responsibilities
- Hosting Locations
- Reporting & Follow up

Next Steps

- Onboarding
- Sign-Up Form
- Toolkit > Event Checklist
- Running the Event

Websites

- LunchandLearn.cloud
- Acumatica.com/InL



The Acumatica **Lunch & Learn** event series is a turnkey program designed to help accelerate pipeline velocity and increase revenue by moving your prospects to the next stage of the decision-making process.

Through a cohesive, one-stop platform, you will be armed with the tools and resources needed to host regional prospects at a series of local, intimate events. Acumatica will provide:

- Established event logistics
- Customizable, on-brand marketing assets
- Event coordination and support

The Lunch & Learn series has been built to remove variables, save time, and enable you to host multiple successful events.

ABOUT > Goals and Objectives

Goals

- Increase prospect leads and purchase propensity in your region
- Demonstrate why Acumatica is the ideal solution for mid-market growth companies
- Strengthen relationships to keep Acumatica *top-of-mind* as prospects are evaluating ERP solutions

Objectives

- Provide you the opportunity to host 4-5 Lunch & Learn events with provided resources
- Gather actionable metrics
- Accelerate your pipeline velocity

ABOUT > Roles and Responsibilities

Acumatica

- Develop, distribute, and maintain the L&L series platform and process
- Create and share marketing collateral, presentation and training materials, and event documents
- Manage host location connections, RSVP portal, and share weekly Registration Reporting
- Fund 50% of F&B expenses according to the *Lunch & Learn Funding Policy*
- Provide coordination and support as needed

You

- Commit to hosting 4-5 events in 2020 with a minimum of 10 prospects per Lunch & Learn event
- Follow the Event Checklist, and utilize the Toolkit materials effectively
- Report post-event feedback and send final Registration Report
- Fund remaining 50% balance of F&B expenses, along with any other expenses accrued

ABOUT > Hosting Locations



Landry's Restaurant Group

Acumatica has partnered with Landry's to source consistent, high-quality locations in the city/town of your preference for you to contract with. Through a streamlined process on the Lunch & Learn platform, you will enter your preferred host cities and dates. The Acumatica Support Team will then share your information with Landry's who will provide options and contracting details directly with you. For simplified planning and budgeting, the Lunch & Learn events have a standardized menu per location and market. Your role with the venue will be to execute the contract, check-in as needed, report final headcounts, and manage the onsite event.

Selected Primary Locations [consistent with menu selection, rooms, and available technology]



*Note: If your city doesn't have a primary restaurant, Landry's will source second tier restaurants for a suitable option. If no satisfactory option is found, the Lunch & Learn Support Team will reach out to you for suggestions. **This is the exception rather than the rule.***



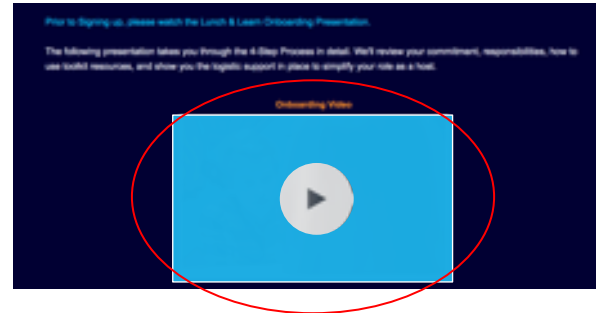
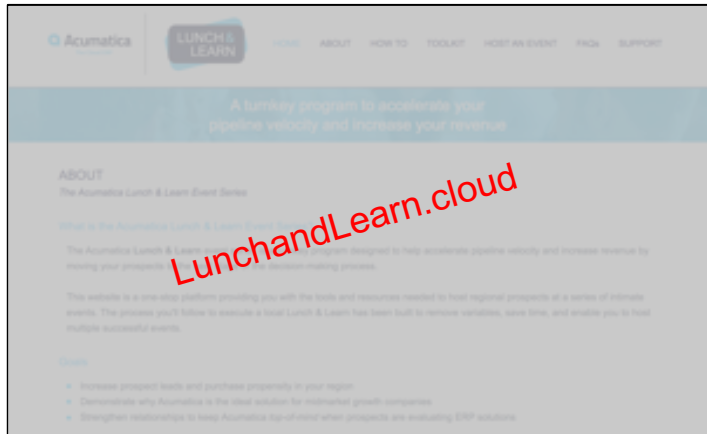
ABOUT > Reporting & Follow up

To measure success and gauge efficacy of the program, the **Lunch & Learn Support Team** will track and report gross numbers and empirical data. Metrics measured will be:

- Number of Events Completed
- Number of Attendees
 - Number of RSVPs
 - Number of Attendees Present
- Empirical Data – Feedback from Attendees via Post-Event Survey on:
 - Event Format and Location
 - Presentation/Value of Information
 - Areas for Improvement
 - More likely or less likely to move forward with Acumatica?

NEXT STEPS > Onboarding and Planning

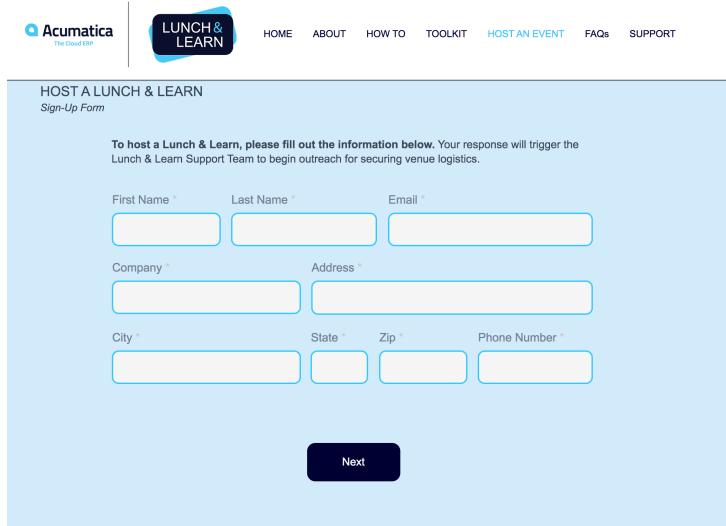
- Understand your role, and commitment, as a host
- Review the website and watch the Onboarding Video



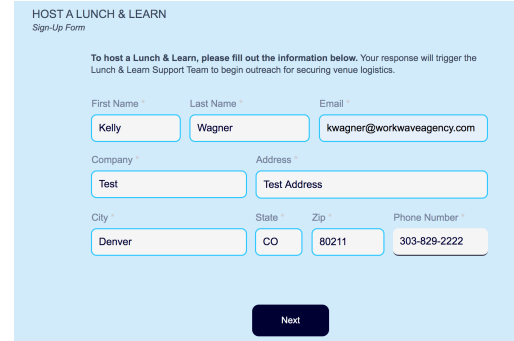
- Commit by filling out the *Sign-Up Form* found on the website under *Host an Event*

NEXT STEPS > Onboarding and Planning

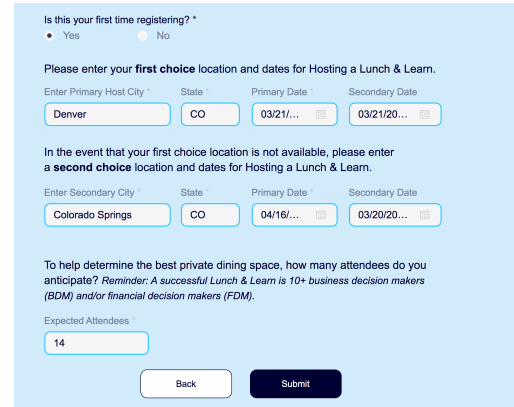
- Commit by filling out the *Sign-Up Form* found on the website under *Host an Event*



The screenshot shows the Acumatica LUNCH & LEARN website header with navigation links: HOME, ABOUT, HOW TO, TOOLKIT, HOST AN EVENT, FAQs, and SUPPORT. Below the header is the "HOST A LUNCH & LEARN Sign-Up Form". The form includes a heading "HOST A LUNCH & LEARN Sign-Up Form" and a subheading "To host a Lunch & Learn, please fill out the information below. Your response will trigger the Lunch & Learn Support Team to begin outreach for securing venue logistics." The form fields are: First Name (Kelly), Last Name (Wagner), Email (kwagner@workwaveagency.com), Company (Test), Address (Test Address), City (Denver), State (CO), Zip (80211), and Phone Number (303-829-2222). A "Next" button is at the bottom.



The screenshot shows the Acumatica LUNCH & LEARN website header with navigation links: HOME, ABOUT, HOW TO, TOOLKIT, HOST AN EVENT, FAQs, and SUPPORT. Below the header is the "HOST A LUNCH & LEARN Sign-Up Form". The form includes a heading "HOST A LUNCH & LEARN Sign-Up Form" and a subheading "To host a Lunch & Learn, please fill out the information below. Your response will trigger the Lunch & Learn Support Team to begin outreach for securing venue logistics." The form fields are: First Name (Kelly), Last Name (Wagner), Email (kwagner@workwaveagency.com), Company (Test), Address (Test Address), City (Denver), State (CO), Zip (80211), and Phone Number (303-829-2222). A "Next" button is at the bottom.



The screenshot shows the Acumatica LUNCH & LEARN website header with navigation links: HOME, ABOUT, HOW TO, TOOLKIT, HOST AN EVENT, FAQs, and SUPPORT. Below the header is the "HOST A LUNCH & LEARN Sign-Up Form". The form includes a heading "HOST A LUNCH & LEARN Sign-Up Form" and a subheading "To host a Lunch & Learn, please fill out the information below. Your response will trigger the Lunch & Learn Support Team to begin outreach for securing venue logistics." The form fields are: First Name (Kelly), Last Name (Wagner), Email (kwagner@workwaveagency.com), Company (Test), Address (Test Address), City (Denver), State (CO), Zip (80211), and Phone Number (303-829-2222). A "Next" button is at the bottom.

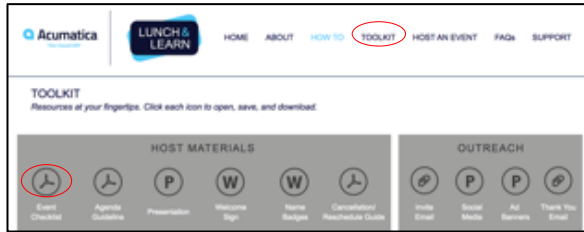
Thank you for Committing to Host a Lunch & Learn

We have received your request.
Below are the next steps.

1. Landry's Restaurant Group will reach out to share date and location options with you via the email address you provided.
2. Watch the Lunch & Learn Overview Video.
3. Visit the [Toolkit](#) and familiarize yourself with the provided Lunch & Learn assets. Download the Event Checklist to begin!

NEXT STEPS > Onboarding and Planning

- Download, review, and follow the Event Checklist



- Utilize materials within the toolkit effectively

- Event Checklist
- Agenda Guideline
- Presentation
- On-site Signage
- Email Templates
- Social Media Content
- Digital Banner Ads
- Demo Video Assets
- Presentation Training



NEXT STEPS > Running the Event... A Glimpse

Running a successful **Acumatica Lunch & Learn** is as important as the preparation.

The Support Team has made the process as seamless as possible to allow you to focus on delivering the message and building relationships. For instance, on event day you will execute the following steps within the *Event Checklist*:

EVENT DAY

- ☐ **Arrive 1 Hour Early to Setup.**
Bring your laptop with the preloaded presentation, any laptop cables/connections as discussed with the venue, on-site signage, name badges (if using), and extra pens/sharpies.
 - ☐ **Test Video.**
 - ☐ **Set Up Registration Table.** Place welcome sign, name badges (if using), and pens.
- ☐ **Greet Attendees and Manage Check-in.**
Use your Registration Report to check-in all attendees and add any new prospects. You will need to report back attendance so keep this with you and legible.
- ☐ **Follow [Lunch & Learn Agenda Guidelines](#).**
Keep the event running on schedule. Thank attendees!



For questions, please contact the Lunch & Learn Support Team at:

Support@lunchandlearn.cloud