The Ultimate Event Management Playbook

A Comprehensive Guide for Marketing, Sales, and Revenue Operations Leaders

Congratulations! 🎉

You just signed a contract to sponsor a big industry event. This is an important day for you and your business because you're getting your name out there (brand awareness 📣) and setting up your team for meetings, pipeline, and revenue.

You're thoroughly prepared for the pre-show prep, the on-the-ground activations, and the post-event nurtures.

Oh.

You aren't sure if you're ready to run an event from start to finish?

Not sure about enablement, planning, activations, timely follow-ups, lead tracking and all the other things that need to seamlessly work together to really drive ROI from that event?

Well, let us help.

Introducing: The Ultimate Event Management Playbook!

Learn tips and tricks from people who've been there, done that.

Table of Contents

Executive Summary

Delivering the best ROI from an event involves a collaborative, coordinated effort between three powerhouse teams: Marketing, Sales, and Revenue Operations (RevOps). In this comprehensive playbook, we've compiled the wisdom of experienced leaders to break down the pre-event, during-event, and post-event actions for each team.

MARKETING TEAM

Managing an event from a marketing perspective first involves creating an event strategy and establishing goals. Then, after identifying a clear owner of the event (typically Marketing), each internal team can align on individual responsibilities.

Working within a budget, Marketing is tasked with overseeing content and speaking engagements, producing materials, and collaborating with the Sales team on pre and post-event outreach and marketing.

Where available, Marketing supports event-based speaking opportunities, dinners, and other hosted events. Once completed, Marketing conducts an event debrief, tracking metrics and gathering feedback for future events.

SALES TEAM

A Sales team's involvement in an event, although collaborative with Marketing, differs greatly in responsibilities. Once Marketing has shared the event framework with Sales and RevOps, Sales leaders will then form a staffing plan.

Working with RevOps, Sales teams will create target lists of prospects for pre-event outreach, ideally scheduling face-to-face meetings. During the event, booth staff are actively engaging with attendees, capturing prospect information and performing product demonstrations. Post-event, Sales team members execute strategic follow up actions, collaborating with marketing and RevOps for lead processing, ranking, segmentation, and nurturing.

REVOPS TEAM

Often overlooked, the RevOps team is a key facilitator for event success and ROI. Working closely with Sales and Marketing, RevOps is responsible for building segmented contact lists, setting up campaign attribution, optimizing meeting scheduling, creating reports, and ensuring the efficient handling of leads post-event. RevOps has the ability to assess event ROI through reporting and dashboards.

01

Marketing Team: Define, Plan, Execute

Event Strategy & Goals

I know you want to jump straight into the fun stuff like branded socks and trade show spinning wheels, but patience there young Padawan.

Creating an event strategy and setting goals is unequivocally step numero uno. If you're not strategic, you could spend a lot of time, money, and energy with little return on investment.

1 EVALUATE ROI

Why are you doing this event? What is the purpose? What stakeholders do you need to get involved? As you set event goals, determine what success looks like.

Evaluate historical data where available. If you've attended this event in the past, review impact under the lens of metrics:

- Net-new contacts
- Pipeline generated
- Meetings held
- Opportunities generated
- Closed revenue

Looking at historical data will help establish your goals and motivate your team to reach those goals. Historical data also has the power to create buy-in.

Other important event goals, though not easily measured, may include:

- Building brand awareness
- Talking face-to-face with existing customers
- Relationship building and networking
- Speaking opportunities
- Checking out competitors
- Showing off your product
- Showcasing new products or services

> "One simple equation for event ROI is at least 4X pipeline from the cost of the event. This is dictated by your sales team's win rates. If my sales reps win 25% of the opportunities in their event-attributed pipeline, then getting $400k of pipeline from a $100k event investment means we covered the cost in closed-won revenue. Adjust the multiplier accordingly based on your reps' win rates."

Rob Simmons
Tech Industry Sales Leader

2 OWNERSHIP

As you begin the planning process, determine which internal team will have ownership of the event strategy. Often, the Marketing team leads event planning, but will collaborate with a committee of Sales and Operations leaders for overall alignment. Marketing typically owns event selection, budget, content creation, and event and booth planning. Sales typically owns outreach, booth staffing, and follow up. Operations will help automate and optimize processes. But don't be surprised if there are some overlapping responsibilities.

Event Strategy & Goals (continued)

3 ICP

Ideally, you selected a particular event or conference because the attendees fit your ideal customer profile (ICP). People go to events with the intention to learn, engage and network. It's the perfect place to introduce new potential customers to your brand, products and services. Perhaps your brand is unfamiliar to them, but because of the power of in-person connections, now they know it.

Take a moment to evaluate your event ICP by answering these three questions:

- Who is my audience at this event?
- What do they want and/or need?
- What do I want attendees to do and/or learn?

4 BUDGET

Establishing a clear budget is a crucial step to managing event expenses. Your event budget may come from an upper level manager or finance department, but if not, set one yourself. If you have an overall, annual event budget, your budget for an individual event must work within that parameter. Past events can provide you with good data to make informed decisions. If you have no previous data, follow these steps:

- List out all expense items from top priority must-haves down to low level nice-to-haves.
- Allocate 15 to 20 percent as a contingency fund.
- Research costs for each line item and estimate each expense.
- Get quotes from vendors. As you lock in vendors, update your expense tracking.
- Keep records of all expenses in Salesforce campaigns or in a spreadsheet. You want to be able to say, "We spent X and we got X in pipeline or Closed Won deals."
- Know your contract and vendor refund policies. Prepare for contingencies if you have a change in staffing or unexpected economic conditions.

5 THEME

The owner of the event strategy needs to define the overall theme of the event. What are the common buzz words of this event community? What is top of mind for them?

In addition, determine how your organization ties into the larger event messaging. Build that into the theme and story you bring to the event. For example, if the event is Dreamforce and the overall theme is artificial intelligence (AI), your theme should demonstrate how your organization fits within the AI conversation.

Content Plan

Armed with your event strategy, goals, and specific audience in mind, you're ready to build a content strategy. This will help you stand out, but also raise your company brand above competitors who don't have one. A content strategy defines the theme for your booth and may even dovetail into speaking opportunities. Your company's attendance at this event should be promoted similar to a branded campaign. Form your content plan in three basic steps:

#1 DETERMINE CORE MESSAGING

Select keywords and craft messaging that aligns with your overall theme, and your company's products and services. Use storytelling wherever possible.

For example, in 2023, the OpsStars conference theme was "Activate the Ultimate Revenue Machine." One of the booth vendors, LeadIQ, hosted a session with Barbie- themed branded assets that read, "This Barbie Builds Pipeline." During the session, LeadIQ described three ingredients that are critical to pipeline generation: accurate data, efficient processes, and automation.

#2 SELECT CONTENT CHANNELS

Define what channels you want to use to promote the event:

- Social media (platforms and influencers)
- Your website (blog and landing pages)
- Email
- Paid advertising (digital and printed)
- Materials for attendees

If your budget does not allow for content across multiple channels, choose one or two that will best reach your audience. Messaging must be consistent with your theme and cohesive across the channels you use. The goal is to capture the attention of your target audience while maintaining your brand identity.

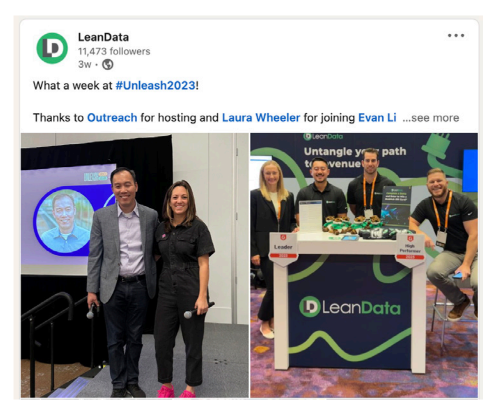
#3 PLAN CONTENT ASSETS

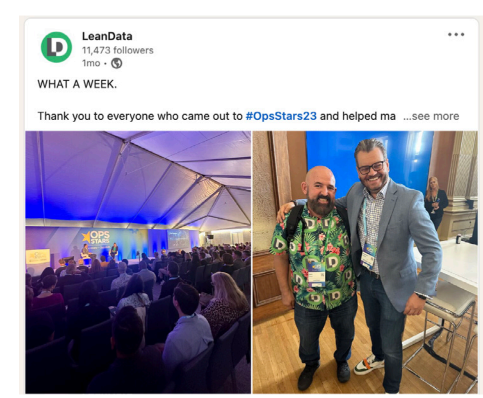
Determine what content assets you'll need. Don't reinvent the wheel. What are your most popular resources among your audience? Repurpose them for your event.

Consider relevant companies that are also customers. Speak to those well-known names, perhaps displaying their logos on the booth copy for better visibility.

Content activities do not stop when the event starts. During the event, make sure that your physical content assets are shared.
Don't let a stack of one-pagers sit ignored on a booth countertop.

Likewise, social content is relevant and has an impact during the event. People love to see human interactions, and want to see what you are doing - it makes the whole event more real. Use social channels to invite attendees, share photos, and upload live-at-the-scene video content.





Design

Now that you have specific content outlined for your event, determine if graphic design can be done in-house or through a contractor. Don't forget, design assets should all be in your budget to start.

In all designed assets, be consistent with your branding colors and typography. Help the attendees easily identify your company and ideally, leave a lasting impression. Your event should portray the same message through all of its correspondence. Your design should match your message and tie into the story you are telling.

Branded assets should span across all event content and materials: signage, swag, etc. Not everything has to be branded with your logo, but the color scheme and general design should be cohesive.

Don't underestimate the time it can take to print your designs. If printing physical materials, consider using a local vendor near the event to avoid shipping fees. If possible, avoid relying on employees to bring materials to your booth. Flights get delayed, people forget things, and rain happens.

Better yet, save money and go green! Consider going paperless and use QR codes which attendees can scan at your booth to access content. Now your content is on their phone.

You've done the work, but may not be there in person at the event. Collect feedback from staff regarding booth appearance, signage, and comparisons with other booths. Find out what worked and what didn't.

PRO TIP: BOOTH DESIGN

Grabbing the attention of event attendees can be a challenge, so booth design is important. You have only a few seconds to make a visual and emotional impact. What kinds of activities are going to draw people in? What will make them stay longer at your booth? Use interactive elements to attract visitors. Your booth design and messaging should reflect your theme. Keep key messaging large, brief, and higher than waist height.

Giveaways & Swag

Maybe you've been there? Watching a competitor's trade show booth attract people like bees to honey with their gigantic spinning wheel and gift card giveaways while you're standing there waving branded pens.

When it comes to giveaways, be memorable. Stand OUT. Ideally, conference swag and branded gifts will keep your business in the minds of the attendees long after the event is over.

While the most common giveaways include tumblers, gift cards, tote bags, stickers, keychains, water bottles, and lanyards, it's important to evaluate: what does your audience want that's realistically within your budget?

Whatever swag you choose, make sure your giveaway is:

- Relevant
- Cost-effective
- Durable
- Shareable
- Creative

Consider having tiered giveaways for cold prospects versus warm leads, and thank-you swag for customers. How many should you order? Here's a general rule of thumb: bring enough items for 30% of the total conference attendees.

Can't decide what to take? Think "pets and kids." Attendees are typically away from their family for events. Giving them something with which they can surprise a special someone when they get home could end up with long-term brand recall. A lot of memorable stuffed animals are still proudly displayed in thousands of kids' bedrooms.

Don't be afraid to ask event goers to **earn your swag** by filling out a survey, listening to a 90-second pitch, watching your 90-second demo, or actually talking to you about your products and services.

DURING THE EVENT: GIVEAWAYS & SWAG	POST EVENT: GIVEAWAYS & SWAG
• Display giveaways and swag in a manner that will make your booth STAND OUT • Restock as needed	• Mail giveaways and swag to customers and prospects who were not able to transport the item • Mail extras back to your office

Enablement

Enablement includes all the information, tools, content, and pre-event outreach your team needs to not only prepare for the event, but more importantly, build pipeline and close deals.

The enablement process is essential to meeting your event goals. And, enablement makes it possible to align your marketing strategy with your Sales team.

Before the event, enablement involves scheduled information sessions, email templates, social media kits and other messaging designed to build awareness of your company's participation in the event, drive attendees to your booth, and ideally schedule a meeting with your team.

The essential components of a Staff Enablement Guide include:

- **BASIC CONFERENCE DETAILS**
- **OUTREACH RESOURCES**
- **FAQS**
- **KEY DATES**
- **FLOOR PLANS**

For a more detailed enablement checklist, see the Staff Enablement Guide Checklist in the resources section of this ebook.

PRE-EVENT ENABLEMENT:

- Meet with your Sales team to explain how the leads will be segmented, scored, and distributed.

ENABLEMENT DURING THE EVENT:

- Assign a member of your booth staff to monitor the attendee scanner. Ask booth staff to include notes from prospect and customer conversations.
- Download the attendee lists from the scanner at the end of each day.

POST-EVENT ENABLEMENT:

Once you get the final lead list, it's go time. There's no time to think about how you're going to use it. Post-event follow up is a speed game.

- Deliver lists from the scanner to RevOps for deduping and enrichment.
- Generate lead scoring reports: evaluate leads based on the attendee's engagement with your booth (no interaction, stopped by, did a demo, etc.), persona detail, current pipeline status, and other elements that fit your unique lead scoring model.
- Implement your lead strategy and provide follow-up content for your Sales team.

Activation Plan

Event activation focuses on creating a connection with prospects and customers — building excitement for the event and promoting brand awareness. Forming an activation plan involves outreach campaigns in whatever channel best reaches your audience: email, social media, direct mail and others.

PRE-EVENT ACTIVATION

The purpose of pre-event activation is to motivate your prospects and customers to take the actions that you want. Those actions may include completing an event registration form, setting a meeting with your team, or requesting an in-person demo of your product.

POST-EVENT ACTIVATION

For post-event activation, think about what will help your sales reps the most. How can you give them full visibility and context for good follow up? Not all attendee actions have the same value (think booth scan versus demo). Therefore, you may want to rank the actions that attendees take. This will help your Sales team prioritize.

How can you follow up and nurture appropriately so it doesn't just feel like another vendor email in your inbox that says, "Great seeing you at that event..." If your booth staff has taken good notes, your follow up campaign can include personalization and the right amount of context to nurture your prospects down the funnel.

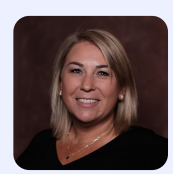
Your first touch should stand out from other vendors. With so many other companies contacting attendees at the same time, bring context to your messaging and move quickly. That's why you need to coordinate with your RevOps team before the event. Likewise, enable your Sales team with follow up instructions, email templates and other related content to begin their outreach before the event.

For marketing nurture campaigns, wait a few weeks. Let the Sales team perform their outreach. Because some leads will not qualify for sales outreach, include them in marketing nurture campaigns.

Pre-Event Resources

Resources	
Registration Link	
Email Templates	
Marketing Email Promo & Drafts	
Social Posts to Share	
LinkedIn	
Twitter	
LinkedIn Profile Banner	
Content to Share	

"When you go to an event, you typically get booth scans and come away with a long list of leads. When your on-site employees are putting in detailed notes, you give the BDR and AE teams good meat to talk about in the follow up conversations. It makes your organization look like a more genuine, connected company."



Nicole Kovacs

Senior Events Marketing Manager, CaptivateIQ

Booth Enablement

Booth staff are your company's brand ambassadors. Pre-event booth enablement is an opportunity to set clear expectations and responsibilities so event goals are top-of-mind.

Each member of the booth team should be trained on:

- ATTIRE
- ETIQUETTE
- TALKING POINTS
- EVENT GOALS
- GIVEAWAY GUIDELINES
- HOW TO USE BOOTH SCANNERS

During the event, provide support to your staff in the following ways:

- Make sure your booth is staffed 100% of the time. Build breaks into the booth staffing schedule.
- Create a command control center — an event chat through Slack, Microsoft Teams, or a simple group text to keep staff connected.
- Schedule staff check-ins throughout the day to take the pulse of your booth.
- Create a friendly competition within your booth staff to increase scans and meetings.

Speakers

A successful event is fueled by a powerful lineup of speakers. Their influence and expertise drives registration. Whether one of your employees is speaking at an event, or you've asked a customer, influencer, or industry expert to speak on your behalf, you definitely want them briefed and managed carefully.

Speaker management starts with clear, concise, personalized, email communication. It's critical that speakers feel comfortable and supported. A [Speaker Enablement Kit] is highly recommended. This resource contains key details on the event date, time, location, audience, and contact information as well as important deadlines. Provide a site layout, parking information, presentation templates and technology support details.

If, in the future, you would like to use content from the speaking session, be sure to include a media release form so the speaker is aware and gives consent.

Don't be afraid to tap into your speaker's social network to promote their speaking session. To facilitate this process, create social graphics your speakers can share on their social channels. Include hashtag recommendations where appropriate.

Show up to the event early to confirm that all presentation materials are ready, technology is functioning properly, and audio and video are working. Place a bottle of water at the speaker podium.

And last, don't forget to send a post-event thank you note and/or gift to your speakers. You may need them again.

"Our speakers are experts in their field but without an understanding of what's required or what to expect, their experience will be chaotic and stressful. Guidance is key. Speakers need a clear picture of their commitment, firm deadlines for accountability, and an understanding of what to expect at the event."

Melissa Braxton-Rasumoff

Events Coordinator, Trusted CMO

Dinners & Hosted Events

A good number of customers and prospects, consider having a wrap-around event by hosting a dinner. Nothing beats having a meal with your customers and prospects in the same room. No video call can match that.

Don Otvos, LeanData VP of Business Development and Alliances, has attended hundreds of business events in his career - the good, the bad, and the awkward. Here are Don's tips on hosting a successful customer dinner:

DON'S DOS AND DON'TS FOR HOSTING A SUCCESSFUL COMPANY DINNER

#1 It's not about the food
You don't need to spend a fortune at a five-star restaurant to have a great customer dinner. People aren't coming for the food – they're going there to network with people they want to meet professionally. Coordinate with the restaurant and pre-order a family-style meal. Save your company's money and focus on the guest list.

#2 Not too big, not too small
The ideal size of a customer dinner is about 10 people. Any bigger, and it's too hard to make introductions and get a good mix of conversations going. If your group is bigger than 10, split into two tables and allow people to play musical chairs if needed.

#3 RSVP Hack - Getting people to show up
In your reminder email, include verbiage like "Here are the names, titles, companies, and links to LinkedIn profiles of the people who have RSVP'd yes." Let people know who will be there. Nothing wrong with shaming people into showing up.

#4 Name badges
Wear name badges? Yes. Have assigned seating? No.

#5 Pitch your company?
Avoid it. If they're coming to your dinner, they know who you are.

One day, and again, one hour before your dinner or hosted event begins, send reminders to your attendees, preferably via text message. Include directions and link to the venue if possible.

Show up early (30 minutes) to the venue and check on everything: the menu, seating arrangements, wine list, etc. Do you need a table to set name tags out? Will you be giving out swag? Does it need to be placed at each setting or with name tags?

Dinners can be fun, but they can also be difficult if you don't know what to do or what to say. Don't make any pitches, but do say something to welcome everyone. Don't sit your team together, but do make sure each person greets all guests.

As with your speakers, send a post-event thank you to your guests. When appropriate, spotlight the event and guests in a social media post.

Event Debrief

So how did it go? What worked, what didn't, and what will you do differently next time?

When the dust settles and all staff have returned from the event, conduct a debrief with all relevant stakeholders.

WHAT WORKED	ROOM FOR IMPROVEMENT	FEEDBACK FROM STAFF

Use a simple shared spreadsheet with columns for What Worked, Room for Improvement, and Feedback from Staff (see Event Resources). Or, send post-event surveys to all relevant staff.

DID YOU REACH YOUR GOALS?

In addition, it's important to calculate event ROI. Evaluate the following metrics:

- Number of attendees or booth scans
- Number of qualified sales leads
- Number of customer meetings
- Amount of sales pipeline generated
- Social engagements

In regards to event ROI, this concept is key: ROI may not just be about pipeline logged in your CRM. It might be based on the pipeline or ARR in room.

For example, a customer event may not drive as much pipeline as a new business opportunity, however, getting in front of the right people at the right companies may be worth it. This metric should be defined pre-event.

Refer to these debrief notes when planning your next event.

02

Sales Team: Identify, Communicate, Activate

Sales Staffing Plan

Which members of your Sales team will you send to each event? There are many factors to consider: event location, event size, employee location, employee skill sets, event attendee profiles, and budget.

If employee “A” is friendly when talking to people and gives fantastic demonstrations, but needs an expensive plane ticket and overnight accommodations, you may need to go with employee “B” who lives locally, is approachable, but may need some training on your products and services.

Have diversity of roles at your booth. A typical booth will be staffed by multiple employees serving different roles: welcoming visitors, demonstrating your product, gauging interest, and qualifying prospects.

Consider event attendee profiles and which of your staff members are best suited to speak to that audience. If event attendees will likely want to get technical, be prepared with staff who can answer technical questions.

Also consider what members of your team should NOT attend the event so that sales activities are not stalled or interrupted. You’ll want to minimize the business impact of a reduced Sales team.

While events take time and energy, they can also be seen as a reward for your team. Maybe you have an SDR who has been doing well and you want to give them more opportunities, or an AE who has booked more meetings than anyone else. If you can plan to save one or two slots for high-performers, this helps build out an events roster for the future.

“Sometimes we forget our roles at an event. Be who you are. If you’re an SDR, then be an SDR and prospect, connect and qualify. If you’re an AE, go a little bit further into discovery. Roles don’t change at an event. Everyone has a clear duty.”

Rico Davis

Head of Sales, Trendsi

Employee Travel

Travel expenses are often the toughest business expense to control. Employees travel in different ways, to different locations, and at different frequencies.

Having data on average flight costs, nightly hotel rates, as well as average meal and ground transportation costs, will help accurately anticipate future expenses.

Here are a few tips and tricks:

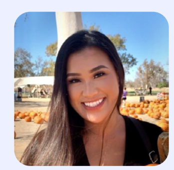
- Ask employees to book flights at least two weeks in advance — several months in advance is ideal
- Check if the event is offering discounts on nearby hotels, restaurants, and transportation
- Consider signing up for a corporate Uber account
- Offer incentives to employees who save funds on business trips

Remind employees to block their calendars for the day they will be out-of-office. This prevents important meetings from being scheduled on travel days.

"It's fundamental to have everyone in the company follow the same travel policies. This creates transparency for everyone involved and allows for better management of the expense budget.

Your company should have airfare expenses and daily meal policies documented and easily accessible to employees.

I recommend booking hotels within walking distance of the event venue. When this isn't possible, strive for the next best alternative and relay transportation options to travelers. Ideally, you want to choose a team hotel where individuals can be accounted for as safety is key."



Vivian Ho
Employee Events & Experience Manager, LeanData

Account & Contact Selection

Not every event attendee will be a fit for your product or service. That's why it's important for your Sales team to know what companies are coming to the conference and create a target list of prospects.

Who do you want as clients? Choose Accounts and Contacts that are the most attainable and, at the same time, hold the most potential value — like stakeholders and decision-makers.

Begin with a set of criteria:

- Company size
- Industry
- Ideal Customer Profiles (ICPs)
- Proximity to event location

In addition to attendees, review the list of exhibitors, sponsors, and speakers who will be at the event. They may align with your target ICP.

Have a speaking slot? Consider offering the opportunity to one of your champions. Their thought leadership will add value to the event and keep your organization top of mind.

During the event, as your Sales team connects with attendees, make sure they take detailed conversation notes. Most events have scanners. Your team should see this as a requirement and not optional. Scanners help with context and allow for more personalized follow up after the event.

PRO TIP: ACTIVATING YOUR CUSTOMERS

"Don't forget about your existing customers at events! Let your customers know about events you're participating in and encourage them to stop by your booth with an offer like a unique gift or piece of swag just for them. You can use this opportunity to showcase new features or products, or even ask for a review in exchange for a gift card - whatever your goals are, you don't want to miss an opportunity to meet your customers in person and build those relationships!"

Ashley Ward

Director, Customer Marketing, LeanData

Any attendees who engaged with your staff, your booth, or attended your speaking session should be enrolled in a sales or marketing nurture campaign, post-event.

Internal & External Incentives

Listening to a sales pitch is never top-of-list for event attendees. In fact, it's often a turn off.

So if it's within your budget, include some kind of incentive that will help you rise above the noise and encourage attendees to schedule a meeting or demo. Since not all prospects share the same interests, offer a few different incentives to determine the best fit for your audience.

PRO TIP:

If you want to do something big, check with your Finance team before you get it going. Why? Because based on your location, prizes above a certain amount may have tax implications.

Event goers generally like swag. It's the gift they bring home for family, friends, and pets. Offer something memorable that will keep your company top of mind. For more details, see "Giveaways and Swag" in the Marketing section of this ebook.

If you're concerned that a prospect is only taking a meeting for a gift, then test and measure the process. What is your win rate on incentivized vs. non-incentivized opportunities? What was your pipeline conversion rate? How much time did it take away from your Sales team? Did it help your team hit goals?

Use caution with demo incentives. Especially in the enterprise and public sectors, companies may have restrictions on employees accepting gifts for any reason.

One way to keep your database clean is to send a survey post-event to people who received your swag. Include an option for the attendee to mark they only came to your booth for swag. This allows you to identify them for a nurture campaign rather than Sales team follow up.

Now let's incentivize your team.

Sales is a tough job. Gamification makes it more engaging and more fun. So in addition to offering incentives to your prospects, it also helps to motivate your Sales team with SPIFFs (sales performance incentive funds). These short-term bonuses are designed to motivate employees to achieve specific goals or targets — like meetings booked. Cash is great, but SPIFFS can be many different things:

- Tickets to a sporting event
- Concert tickets
- Weekend stay at a five-star hotel
- Travel vouchers
- Fine-dining experience
- Tech toys
- More PTO
- Spa treatments
- Gift cards
- Team activities
- Memberships

Be sure to recognize and celebrate achievements. **A little recognition can pay dividends in morale and loyalty.**

Driving Traffic To Your Booth

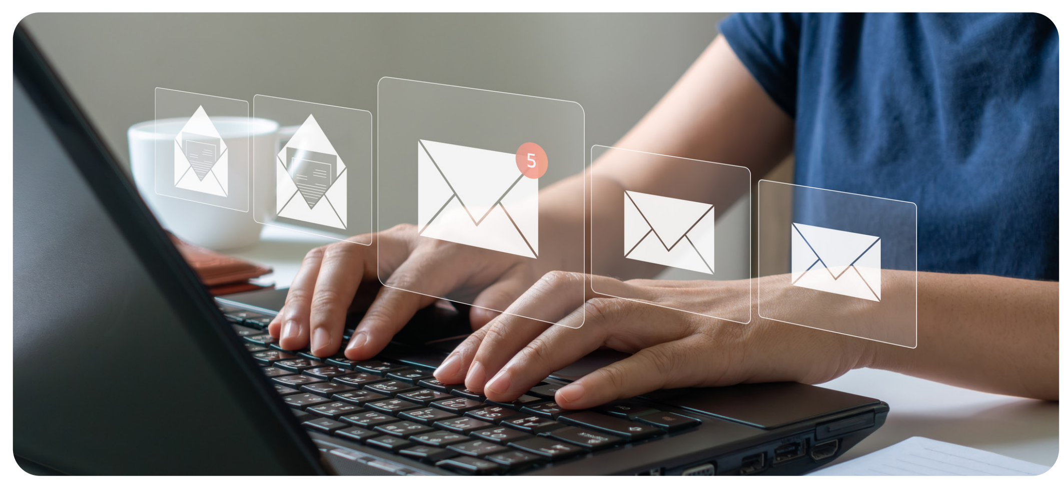
For pre-event outreach, get input from both Sales and Marketing to build email templates and sequences. Remember that event attendees get emails from many vendors, so try to make a human connection. Talk about their goals for the conference and the sessions they may want to attend. If you are multi-threaded in an account, tap into a warm introduction from a mutual acquaintance, and provide multiple people with different sessions they may be interested in.

Personalize your outreach based on the characteristics of the Accounts and Contacts you are targeting. **Do not send the same email message to current customers that you plan to send to cold prospects, or open opportunities, or former customers.**

Pre-event outreach begins approximately four weeks before the event date. When dealing with large attendee lists, work with your Operations team to personalize and automate campaigns as much as possible. Attendees are getting a lot of emails, so do something unique to stand out.

Don't be discouraged if your initial outreach doesn't result in high numbers of meetings. Event attendees' calendars often won't firm up until a week before the event, so keep trying.

PRO OUTREACH TIP:
Show you are attending an upcoming conference by putting it in your email signature block. This may indirectly start conversations or create opportunities with other prospects in your mailing list by having a common conference in conversation.



Scheduling Meetings

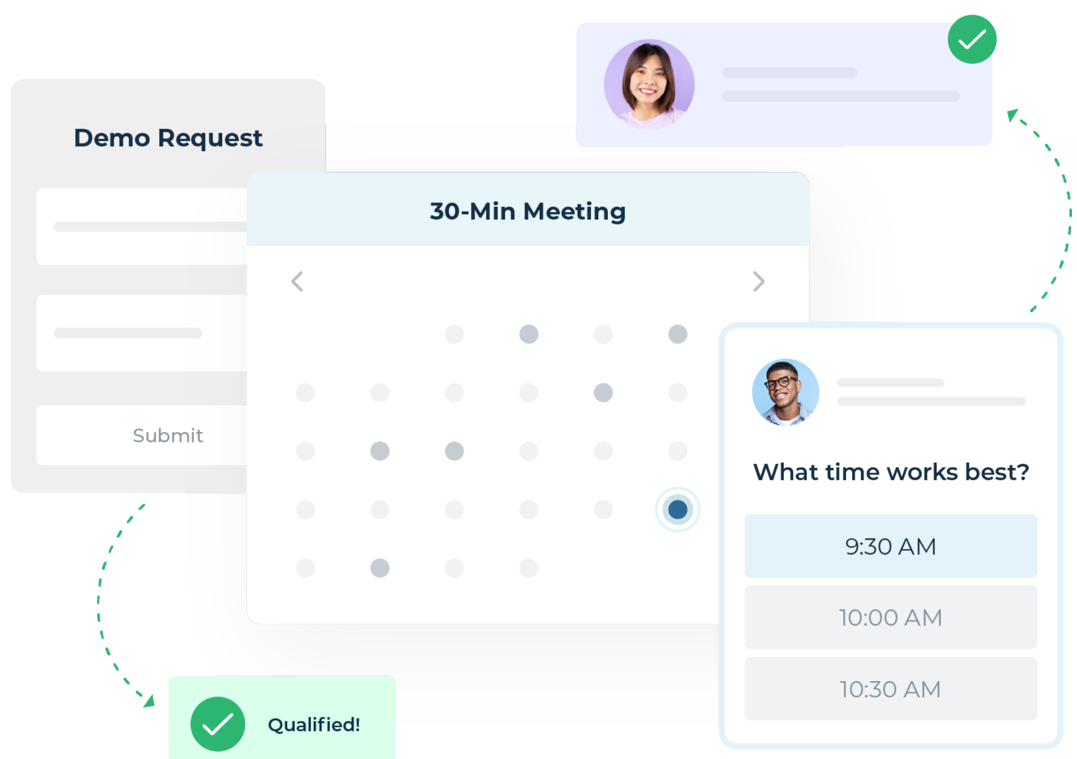
One of the main reasons to attend a conference is to meet with prospects and customers. Unquestionably, face-to-face meetings have a higher impact. In person, it's easier to communicate more effectively because participants can pick up on nonverbal cues and ask related questions.

Schedule meetings with existing customers too. Don't miss an opportunity to strengthen existing relationships and be a trusted partner. Renewals and upsells are often ignored yet valuable revenue streams.

When scheduling meetings, we highly recommend using an automated meeting scheduling solution. This greatly increases your chances of booking meetings. It's easy, flexible, and allows prospects to be in charge of their schedule.

For example, LeanData's [BookIt for Forms] allows prospects to request a meeting and instantly schedule a time that's convenient for them. This removes the back and forth involved in deciding times and places to meet. Plus, BookIt for Forms helps prevent no-shows with automated meeting reminders.

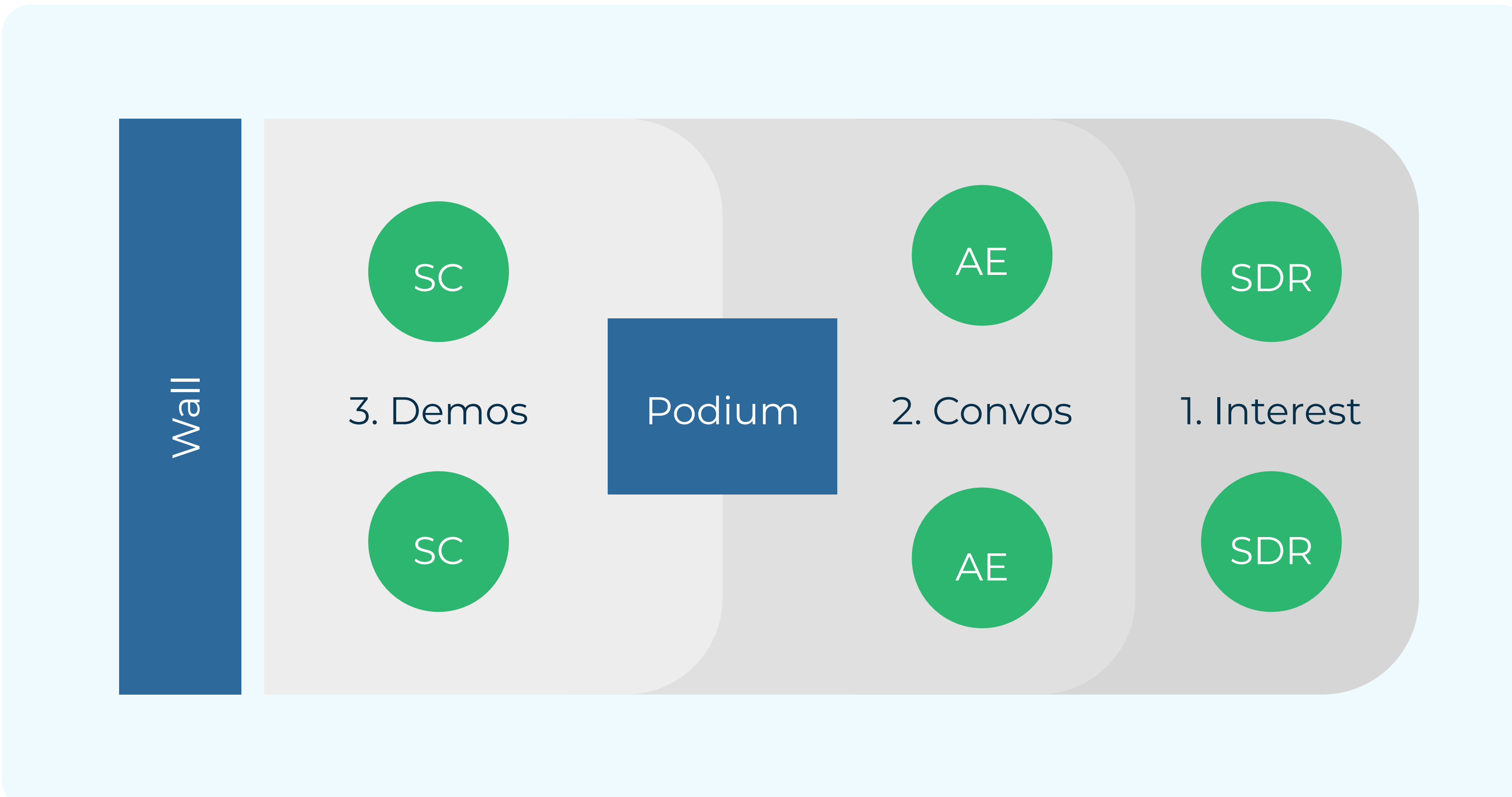
In your meeting reminders, include directions to your meeting location, a floorplan of the trade show layout, and contact phone numbers in the event of scheduling issues.



It’s Go Time: Working the Event

WORKING THE BOOTH

While it’s common to see staff standing behind a booth podium, waiting for passersby to take interest, that passive strategy does not breed success. Ideally, you want SDRs out in the aisles among attendees, hustling and bringing people in for a conversation. Then, your sales reps are prepared at the booth for a more robust discussion. Place demo stations towards the back of the booth.



PLAYING THE ZONES

Think of your booth and extended area like a sports court with defined positions. SDRs live in the outer areas (Section 1), driving interest toward the booth. AEs are located in the middle (Section 2), having conversations with prospective customers. Solution Consultants (SCs) occupy the rear section of the booth (Section 3), ready to demonstrate your products and services.

Now’s the time to activate your giveaways. No need to hide it in a cardboard box behind a cabinet. Make that swag VISIBLE.

It’s Go Time: Working the Event (continued)

MEETING SPACE

Where will you hold meetings? Meeting rooms may be available during sponsorship selection, however, this may require a significant investment. If your booth doesn’t accommodate meeting space, check if the conference has designated meeting areas. You may be able to rent space from another vendor at the event as well. It’s always good to have friends!

If private meeting space is not an option, work with your planning team. There may be other sponsorships, or even restaurant spaces you can reserve for a few hours. It will take some leg work, but with event ROI top of mind, meeting space is worth the investment.

As your team demos your products and services, have them focus on the benefits your specific audience cares about. Questions like “What do you do at [company name]?” can help you tailor your messaging to their needs. It may also help weed out attendees who are just looking for swag.

But as with any conversation, don’t emphasize your company or the features of your product. Your demo should focus on your customer’s pain points and the benefits they’ll reap from your product. Strong pre-event enablement will pay off as your team uses the talking points provided to them.

DURING THE EVENT: MISSION CRITICAL

1. Scan badges
2. Select Status
   (Ex: Hot Lead, Needs Nurturing, No Opportunity)
3. Add relevant notes

PRO TIP: BOOTH SCANS

Working with RevOps, Sales and Marketing will determine which data fields will be collected in the booth scans. RevOps has insight into which fields can be completed post-event through data enrichment tools, thus saving time and improving engagement at the booth. This generates better experiences for both customers and team members alike!

Event Follow Up

Event follow up is a collaborative, coordinated effort between Marketing, Sales, and RevOps. These three teams work together to upload lists, rank and segment leads, and nurture them with the appropriate next steps.

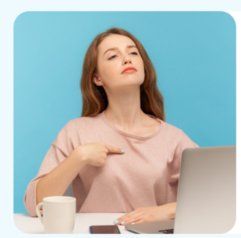
Immediately after the event has ended, RevOps should be done processing event attendee lists. This is the signal for the Marketing team to initiate post-event enablement with the Sales team and provide related content for follow up.

Event attendees who spoke with your booth staff should seamlessly advance to a demo or the next action in the buying journey. This is where booth notes pay dividends. For example, if an attendee already had a conversation at the booth, that person needs to skip over a BDR and go directly to an AE.

After the event, booth staff should be willing to share all feedback and potential revenue opportunities. It's important to create a culture in which Sales team members are taught to work as a team. Employees can have individual goals, but at the end of the day, an event is not an individual game. Booth staff are there to help the business.

THINGS TO DO:

- RevOps processes all event attendee lists.
- Marketing initiates post-event enablement with the Sales team.
- Sales follows up with demos or the next appropriate step in the sales cycle.



THERE SHOULD BE NO ATTITUDE OF

"I WAS THERE AT THE EVENT, THEREFORE THIS LEAD IS MINE."

03

RevOps Team: Automate, Report, Analyze

List Building

Revenue operations (RevOps) plays an essential role in automating both pre-event and post-event outreach. And, because RevOps owns and manages the CRM, Marketing Automation Platform, and other parts of your tech stack, they are the most qualified to build contact lists.

However, in order to build lists, RevOps needs input from Sales and Marketing on the event outreach strategy. RevOps needs to know ICP criteria like job title, persona and company segment.

Event attendee lists fall into two basic categories:

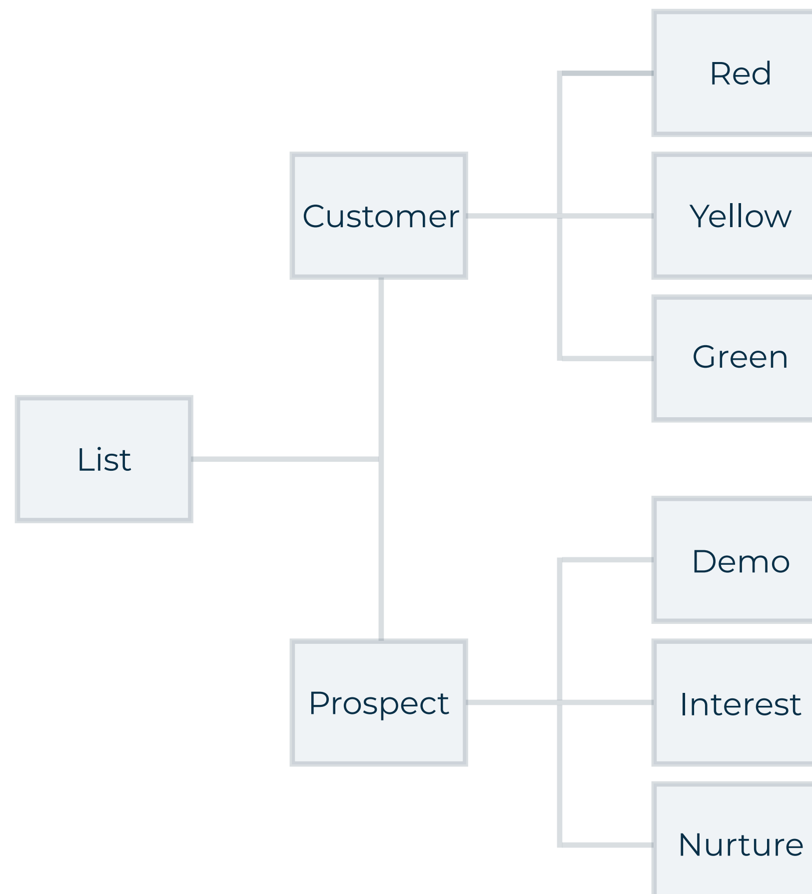
- Event registration list, provided by the event host
- Current customers and prospects, not yet registered, in the event's geographic area

RevOps will need to know how to process unassigned accounts that show up on the attendee list and which Sales teams will work these accounts.

REVOPS TECH TOOL TIP:

Both pre and post-event, LeanData can help RevOps enrich, score, route, and notify sales reps within minutes, if not seconds, providing both speed to lead and speed to context.

Armed with this data and requirements, RevOps creates segmented lists, dividing registrants into customers, cold prospects, active opportunities, and potentially Closed Lost opportunities. While RevOps creates the contact reports to be used in pre-event outreach sequences, the Marketing team typically creates the content (email templates) used in outreach.



Campaign Creation & Reports

In order to track the ROI from your event, RevOps coordinates campaign attribution beforehand. This involves creating specific event campaigns within the CRM, setting up triggers and scoring models, and ensuring data hygiene. One event may have many campaigns — especially if there are multiple "wrap-around" events such as customer dinners, sponsored happy hours, or speaking engagements.

Campaign creation generally follows the seven basic steps listed below.

To track the performance of the campaigns, RevOps will set up reporting and dashboards to show metrics like registration, attendance, and ROI.

1 CAMPAIGN INFORMATION

Fill in the basic campaign information, including the campaign name, type (e.g. Trade Show), start date, end date, and cost.

2 MEMBER STATUSES

Define member statuses to track the progress of leads and contacts within the campaign. Common statuses include "Registered," "Attended," "Followed up," etc.

3 ASSIGN OWNERSHIP

Assign ownership of the campaign to the relevant team or individual, such as the Marketing Ops or Sales Ops team.

4 ADD CAMPAIGN MEMBERS

Import or manually add leads and contacts to the campaign. These are the individuals who will be associated with the trade show event.

5 CAMPAIGN INFLUENCE AND ATTRIBUTION

Configure campaign influence and attribution settings to track how the campaign contributes to revenue.

6 CAMPAIGN MESSAGING AND ASSETS

Upload campaign-related assets, such as email templates, landing pages, and marketing collateral, to the campaign.

7 LINK TO OPPORTUNITIES

Link the campaign to relevant opportunities in the CRM. This helps in attributing revenue to the campaign.

Meetings: Stop Using Spreadsheets

If you're in RevOps, you likely love a good spreadsheet. You may even have received spreadsheet-themed gifts over the years. **Congratulations.**

If your organization relies on spreadsheets to track a high number of event-related meetings, you may want to consider an automated solution.

With a spreadsheet, you need to manually input all meeting details, including date, time, participants, and any other relevant information. This is time-consuming and prone to human error.

Need to update the spreadsheet or send meeting reminders? That's going to be manual too.

Automated meeting scheduling solutions can sync with sales representatives' calendars and allow leads to book appointments directly. This minimizes the back-and-forth communication and reduces the risk of double-booking.

Meeting scheduling tools, like [LeanData's BookIt Suite of Solutions], help RevOps create workflows and link calendars so that meetings are routed and assigned to the appropriate sales rep. Pre-event, RevOps may need to develop training materials and conduct training sessions for sales representatives to explain how to use an automated scheduling tool.

Post-Event List Load Process

Immediately after the event ends, RevOps will clean and scrub booth scans, prepping the lists for post-event outreach. This involves matching, deduping, routing, and updating contact records. All event notes, those that were so thoroughly detailed by your team at the booth, should be added to the record and made easily visible by your Sales team.

During your pre-event prep work, you will establish how you will score leads and who they will go to. RevOps will then be able to get the right leads to the right people in your organization.

ONE COMMON EVENT FOLLOW-UP CONCERN IS LEAD EQUITY. BY FOLLOWING ESTABLISHED ROUTING RULES, REVOPS CAN ENSURE THE LEADS GET TO THE RIGHT PERSON AND ARE DISTRIBUTED FAIRLY.

Reporting & Dashboards

For many months after the event, RevOps will analyze event campaign performance to understand its impact on revenue, and provide it to the stakeholders. These reports should be standardized across all events in order to show apples to apples comparisons. Here are a variety of examples of metrics your organization may choose to track.

OVERALL EVENT PERFORMANCE DASHBOARD

- Total revenue generated from the event
- Number of opportunities created
- Total cost of the trade show
- Return on investment (ROI)
- Number of leads generated
- Number of contacts and accounts added to the CRM

REVENUE ATTRIBUTION DASHBOARD

- Opportunities influenced by the trade show
- Opportunities directly generated from the trade show
- Opportunities closed-won and closed-lost
- Contribution to pipeline and closed revenue

LEAD AND CONTACT ENGAGEMENT DASHBOARD

- Number of booth visits
- Email open rates for post-event follow-up emails
- Click-through rates on follow-up emails
- Conversion rates from leads to opportunities

OPPORTUNITY PROGRESSION DASHBOARD

- Opportunity stage progression
- Time taken to move opportunities through the sales funnel
- Conversion rates at each stage
- Sales cycle length

These dashboards and metrics provide a comprehensive view of the event's impact on revenue and enable data-driven decisions for future events and marketing strategies. The specific metrics and dashboards will vary depending on your organization's goals and the data available in your CRM system.

04

It’s a Wrap: You Got This

Phew, that was a lot of information. 😮‍💨

But you did open The ULTIMATE Event Management Playbook. The wisdom of experienced marketers, events professionals, Sales leaders, and RevOps teams simply cannot be contained in a single one-pager, nor would that be helpful.

Hopefully you now understand why a collaborative effort between Marketing, Sales and RevOps is absolutely essential for event success. You certainly don't need to be able to perform every action in this comprehensive guide, you just need to know your role and where responsibilities intersect.

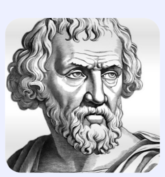
Event management is...

Exciting
Frustrating
Satisfying
Exhausting

And an amazing learning experience every time.

Use this guide. Dog-ear your favorite sections. Play with our Event Resources and Checklists and make them your own.

Best of luck to you and your team.



"Luck is what happens when preparation meets opportunity."

- Seneca

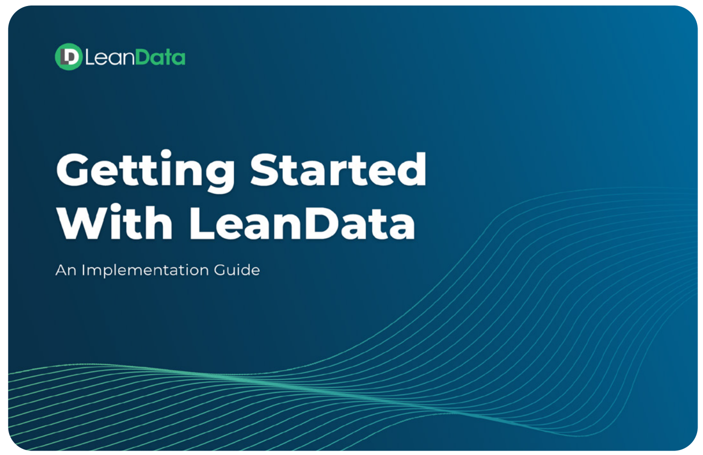
Event Resources & Checklists

- Sample Speaker Enablement Kit
- Pre-Event Resources Template
- Event Management Playbook Grid for Marketing, Sales & RevOps Teams
- Marketing, Sales & RevOps Event Organizer
- Sample Event Enablement Overview
- Event Debrief Template
- Staff Enablement Guide Checklist
- Post Event Follow-up Organizer: Sales & CX Enablement

Recommended Resources

WEBINAR

Steal that Playbook: Activating Your Event Strategy



EBOOK

Getting Started With LeanData: An Implementation Guide

EBOOK

Getting Started With BookIt

Ask Questions

Get Started Today:

Visit LeanData.com to learn more about LeanData's go-to-market operations solutions for Matching, Routing and Engagement, or visit us on **AppExchange**.

Why LeanData?

Today's growth leaders power their B2B selling with LeanData, the gold standard in modern revenue orchestration and an essential element of the modern RevTech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the plays, people and processes needed to transform buying signals into buying decisions. LeanData is inspiring a global movement among its 1,000 customers and community of 5,000+ OpsStars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage. Join the movement!

2901 Patrick Henry Drive, Santa Clara, CA 95054 | 669-600-5676 | www.LeanData.com