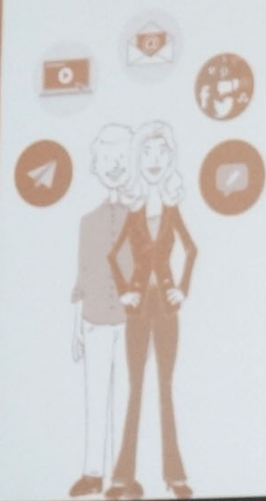


Your One-Stop Event Checklist for Successful Channel Events

5. Integrated Marketing Expert



Marketing Expertise

- ✓ Integrated marketing strategy
- ✓ Social media
- ✓ Content types, strategy, and execution
- ✓ SEO and website best practices
- ✓ Email automation and workflows
- ✓ Events
- ✓ Develop buyer personas
- ✓ Map the buyer's journey



channel
maven
consulting



Increase Engagement Through Events

Whether you're a Vendor or a Channel Partner, events are a great way to continue conversations you've been having, or start new face-to-face conversations.

Event planning is a big task, with tons of moving pieces, so we decided to share some of our tips and tricks in a handy guide to help ensure details aren't missed.

For those just starting to incorporate events into the sales and marketing mix, you will definitely learn from every event you attend and hone your strategy over time.

To make it a little easier in the beginning, we pulled together a checklist to help.

Let's get this party started!

Skip to the printable checklist

Ideally, event planning starts 3 – 6 months ahead!

While a great avenue to connect and reconnect with prospects, events can be expensive.

Fees and travel expenses add up quickly and time is spent preparing, designing, dreaming, executing and planning – all in the hopes the ROI is there at the end.

To get the most out of your events, whether exhibiting, putting on your own, or running a seminar or workshop, it's important to have a system and a routine.

Our goal is to provide you with an outline and some suggestions to make your planning smooth.

Happy event planning!



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Pre-planning 3 – 6 months ahead

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- 7** | Look for speaking opportunities
- 8** | Messaging. Messaging. Messaging.
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- 9** | Design: banners, handouts, SWAG
- 10** | Who will attend

Pre-planning 1 month ahead

- 12** | Ramp up promotion
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At the event

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- 17** | At a seminar or workshop: prepare to engage

After the event

- 19** | Follow up and deconstruct

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THREE – SIX MONTHS AHEAD



ALIGN INTENTIONS and ACTIONS with GOALS



Was the event fabulous or not so great?

At the end of it, you need a mechanism for determining how successful you were.

To achieve the best outcome, define the goal(s) before any planning is done in order to align every subsequent action, decision, and effort with the desired outcome.

Examples of common goals:

- Collect contact information from X-number of attendees
- Get at least X-number of sales qualified leads (SQLs)
- Meet at least X-number of potential business partners
- Conduct market research on X-topics

Begin planning 3 – 6 months in advance:

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LOOK FOR SPEAKING OPPORTUNITIES



Conversing with attendees who visit your booth is valuable.

Speaking in front of a group is priceless.

Use the expertise of your team to leverage speaking opportunities when available. At larger events where you will have a booth, find out early if there are workshops you can run, presentations you can deliver, or interviews you can participate in.

Note: Anytime someone from your organization is in front of a group, it's an opportunity to earn trust, show off your expertise, and develop relationships that drive more business.

Begin planning 3 – 6 months in advance:

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MESSAGING. MESSAGING. MESSAGING.

The purpose of your event specific message is to catch the eye of attendees and draw them into your booth.

Make it simple and concise. Use it repeatedly on banners, handouts, and SWAG. If possible, tie the message to the event's theme.



LOCATION. LOCATION. LOCATION.

Booth location can make or break success at an event.

Warning: premium booth spaces are reserved quickly; as soon as the decision to participate is made – choose your booth!



Best booth locations:

High traffic areas – near the food, restrooms and doors

Corners give you more visibility

The center of a row is better than the ends

Begin planning 3 – 6 months in advance:

Skip to printable checklist

DESIGN BANNERS, HANDOUTS, and SWAG



The biggest stress-reducing gift you can give your team is time. Especially when it comes to printing and outsourcing graphic design work. Be prepared for common issues such as tweaking copy, longer than expected printing timeframes, and unexpected differences such as onscreen vs. printed colors.

Remember: order SWAG well in advance, especially if logos will be added.

Think about: Colors, visuals, paper quality, glossy or matte, size and the number of each printed component you need. Can any of them be reused at future events or is this a one-off? Does it make sense to print salespeople's names on brochures and sell sheets? What about table displays, tablecloths, handouts, business cards, and raffle entry slips?

Differentiate: In a sea of booths, how will you stand out? Beyond expected signage, logos, and handouts – what can you do to differentiate?

How about baking chocolate chip cookies, hanging a 1980's disco ball, or having an in-booth Elvis impersonator taking selfies with attendees? Let's face it, you're probably in Vegas. Did someone say massage chair?

Begin planning 3 – 6 months in advance:

Skip to printable checklist

DECIDE WHO WILL ATTEND

Larger seminars and workshops might warrant logistical helpers but booths still definitely require at least two people just to keep brochures stocked and conversations with attendees flowing. If available, a third person can walk the floor, make connections, and cover when someone needs a break.

Think about bringing non-sales team members such as engineers, customer and tech support, or marketing.

Every department has a different point of view that adds value to conversations. Plus, many consider it fun to contribute to the company's success in a new way.

Tip: When deciding who will attend keep in mind:

- Event length (in days)
- Coverage needed (hours)
- Your goals

Begin planning 3 – 6 months in advance:

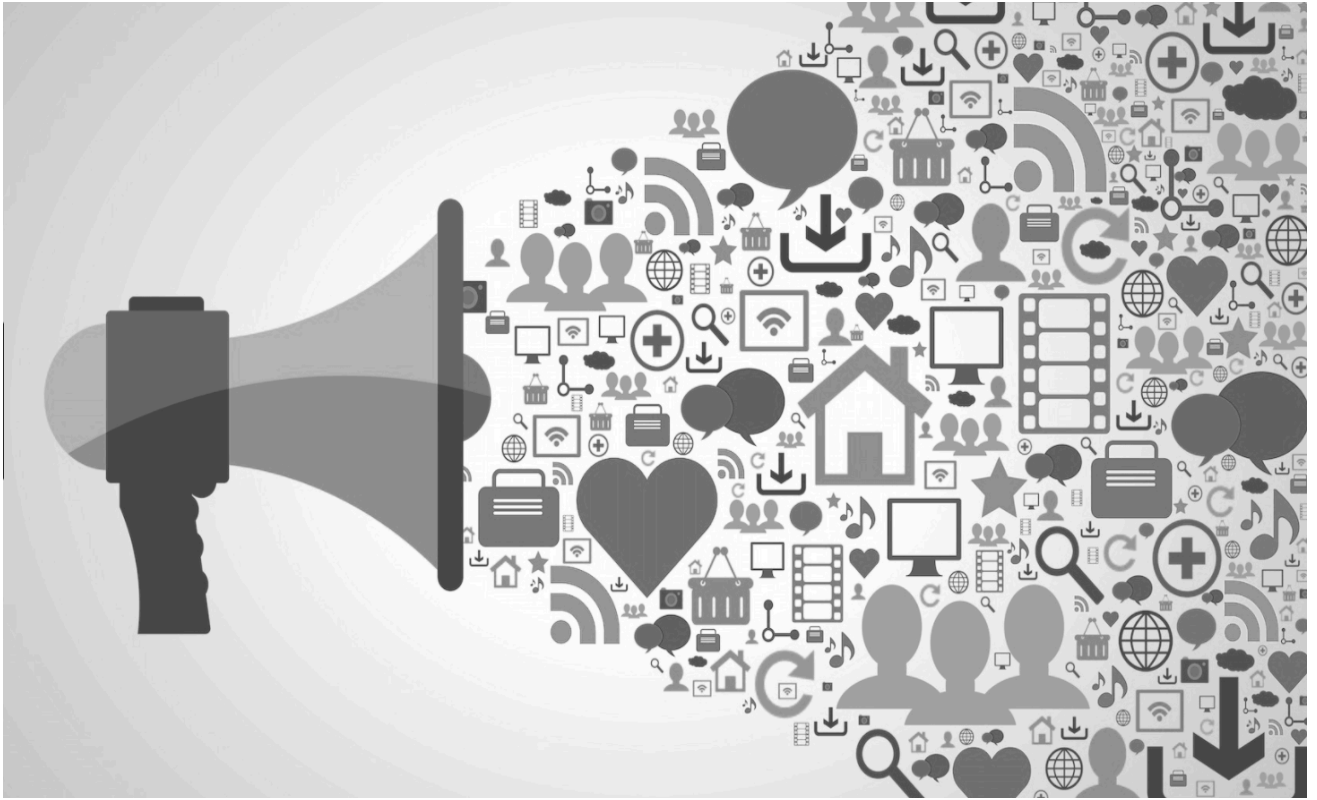


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ONE MONTH AHEAD



RAMP UP PROMOTIONS



The event is right around the corner... it's time to develop a social media promotion plan and begin scheduling posts. Write blogs about the upcoming event and use those links plus event registration and other links in social media posts. Then, to save time at the event, prepare and schedule posts that correspond to speaking engagements and workshops you'll be leading alongside general posts such as, "come visit our booth #xxx." or "Looking forward to talking about ABC at 12:00 in room 123".

Tip: Use the event city, venue name, #hashtags and @mentions to cast a wider net and add the booth number, room number, dates and times that correspond to particular activities.

Obtain the attendee list and...

- Connect on LinkedIn with people you expect to see
- Create an email drip campaign
- Go old school and send postcards (include the booth number!)

1 month in advance:

Skip to printable checklist

ADDITIONAL PROMOTIONS

Set up
meetings in
advance and
connect with
the right people
before you go.

1

Connect with the press who will be covering the event to find out if there's "air time" you can gain.

2

Contact bloggers who are likely to attend and might be interested in a guest post regarding the event.

3

Connect with and schedule face-to-face meetings with anyone currently trialing your services.

1 month
in advance:



PACK YOUR MOBILE JUNK DRAWER

Like in the kitchen, every event needs an assortment of “stuff” to be used in a pinch. A small toolbox works great to store, ship and bring odds and ends you might need:

- Notepads and pens
- Permanent markers
- Tape – masking, painters, scotch and packing tape
- Extension cord and power strip
- Post-it notes
- Stapler
- Highlighters
- Clips – paper clips, cable ties, butterfly clips and rubber bands
- Scissors
- Swiss army knife or all-in-one tool
- First aid supplies – throat lozenges, headache remedies, band aids
- Extra business cards
- Extra phone and/or laptop charger
- Copy of the agenda and contact info for event personnel
- Extra light bulbs (if bringing lights)
- Snacks for the team
- Internet Hotspot

1 month in advance:



Skip to printable checklist

AT THE EVENT



You've planned, packed and traveled to the venue. Significant money has been spent on SWAG, printing, fees, advertising, flights, and accommodations.

It's time to start driving demand and leads!

AT A BOOTH: PREPARE TO ENGAGE WITH ATTENDEES!

- Don't stick to a talk track; ask questions
- Smile, smile, and smile some more
- Be friendly, approachable and unique. Ask:
 - What they're interested in
 - How the event is going for them
 - What they've learned so far
 - Conduct market research - ask pointed questions and track answers
- A/B test your pitch - try different opening comments or lead with different solutions
- Stand (don't sit) even when your feet hurt and wear comfortable but classy shoes
 - Schedule breaks with the team to ensure everyone remains energized!
- If there's room, stand in the aisle and engage those who might otherwise walk past
- Stand by the entry doors and hand out brochures so incoming attendees will know where to find your booth and look forward to seeing you again
- Use audiovisual props and be prepared to demo your solutions (if possible)
- Use videos in the booth to attract attention and face time to create relationships
- Collect as many business cards as you can and make notes on the back
- Even though you're tired, connect on LinkedIn with people you meet each day
- Focus on collecting contact info rather than handing out information



Skip to printable checklist

At the event:

AT A SEMINAR or WORKSHOP:

PREPARE TO ENGAGE WITH ATTENDEES!



Skip to printable checklist



- Make sure the room is inviting and comfortable
- Be friendly and approachable:
 - Come up with an ice breaker
 - Use humor and storytelling
 - If the group is small, have introductions
 - Align presentation with audiences takeaways
- Practice your presentation – a lot!
- Create a tangible takeaway (how to guide, checklist, send the PPT deck)
- Plan activities the whole audience can participate in
- Call on people and ask questions in order to keep their attention
- Break larger groups into smaller ones for roundtables and activities
- Develop a method for capturing group-think ideas (flip board, post-its)
- Get an attendee list and connect
- For longer sessions, add breaks
- Focus on educating and building rapport – what's in it for them (WIIFT)

At the event:

AFTER THE EVENT



MEANWHILE... BACK AT THE OFFICE...

Follow up:

Ensure you connect on LinkedIn, Twitter and/or Facebook with everyone you met.

Execute a nurture email campaign with a post-event special offer.

Write a blog post about lessons learned and share on social media.

Deconstruct for improvement:

The information you gain at an event is valuable for website copy, blogs, e-books and for use in inbound marketing initiatives. Create a topic list and give it to the marketing department.

THINK ABOUT...

- What you learned
- How you can improve on demos
- Which features of your solution people liked the most
- What you learned via conversations with and about your competitors
- Which features you were asked about that you don't have
- What your audience wants
- How they use your products

After the event:

Skip to printable checklist



EVENT PLANNING CHECKLIST



3 – 6 months in advance:

- ☐ Choose a goal
- ☐ Look for speaking opportunities
- ☐ Decide on the messaging
- ☐ Choose your booth location (if you have one)
- ☐ Design and send banners, handouts and SWAG to print
- ☐ Decide who from the team will attend
- ☐
- ☐

1 month in advance: Ramp up promotions

- ☐ Develop a social media plan
- ☐ Write and socialize a blog
- ☐ Get attendee list and connect
- ☐ Send a promotional email campaign
- ☐ Pack the mobile junk drawer
- ☐ Set up meetings in advance



At the event:

- ☐ Prepare to engage with attendees
- ☐ Bring comfortable but classy shoes
- ☐ Stand up no matter how much your feet hurt
- ☐ Collect as many business cards as you can and make notes on the back
- ☐ Connect right away with attendees you meet
- ☐ Do some market research while you're there
- ☐
- ☐

After the event:

- ☐ Follow up
- ☐ Write and socialize a blog
- ☐ Execute a nurture campaign
- ☐ Deconstruct for improvement
- ☐ Use gathered information for content creation
- ☐ Discover what you would do differently
- ☐
- ☐
- ☐

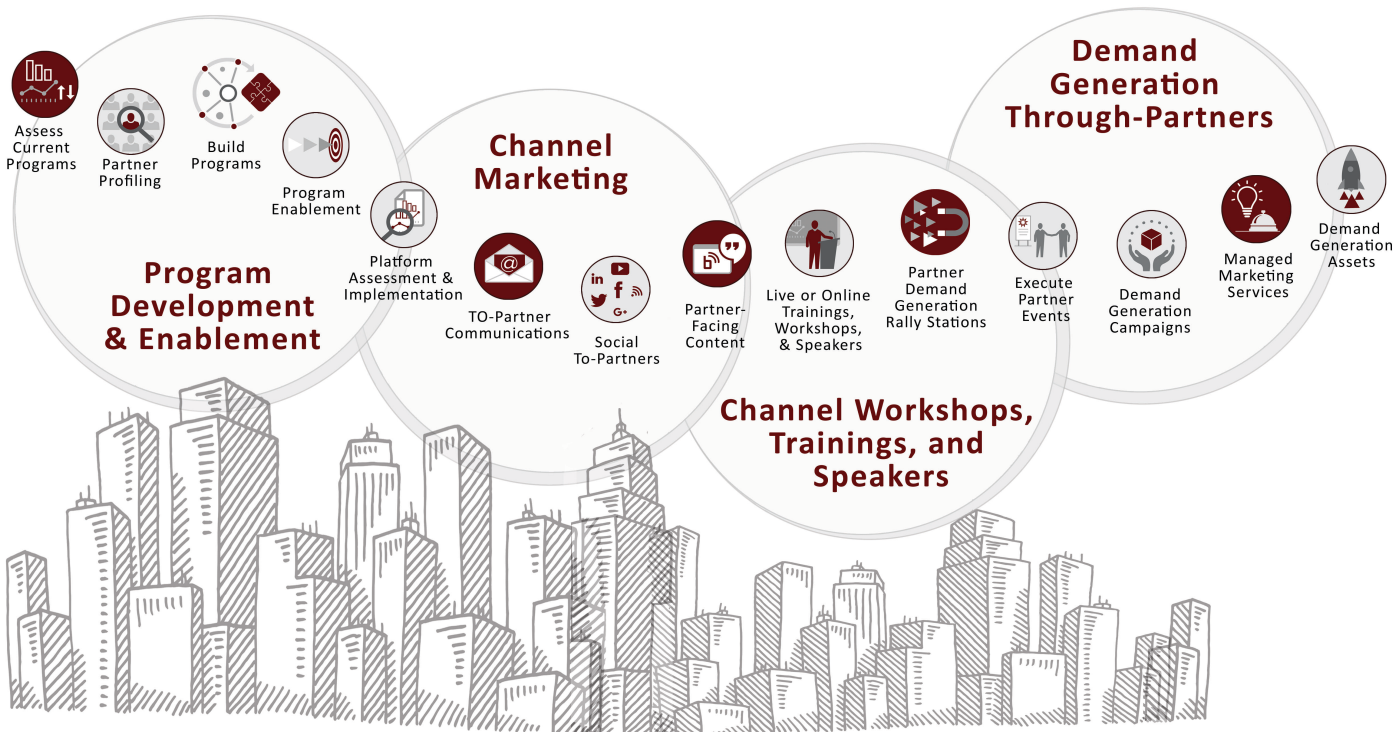


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We Help You **Drive** More Business Through The **Channel**



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