

Event Planning Playbook

Seminars and live events need to be scheduled at least 6 weeks in advance. Webinars or online events can be scheduled 4 weeks in advance. (Multi-segment conferences or events with >100 attendees need to be scheduled 3 months in advance and require more detail that is provided in this document). Framework of this document applies to exhibit opportunities as well.

More than 6 weeks prior to your event:

- Identify content/subject matter for event.
- Identify target audience for event.
- Identify target market (geography) for event.
- Select your date.
- Confirm availability of presenters.
- Confirm availability of sponsors if appropriate.
- Secure Venues for selected date. Reconfirm speakers/presenters if date changes based on venue.
- Put event on company calendar and send Outlook invites to all participants.

Week 6:

- Set agenda for event.
- Compose event description.
- Setup webpage and/or online registration for event.
- Compose event invitation (email or direct mail or both).
- Plan and Schedule demand generation.
- Order printed invitations if necessary.
- Place creative ad with newspaper if appropriate.
- Add to online event calendars as appropriate.
- Submit co-funding requests as appropriate.
- Share invite copy with sponsors as appropriate
- Compile invite list from house dbase.
- Secure new email or direct mail mailing list if appropriate.
- Submit to media for inclusion in online and offline event calendars as appropriate.

Week 5:

- Drop direct mail invites if required.
- Identify collateral or premiums required for distribution at event.
- Order incremental or new collateral or premiums required if stock not sufficient.

Week 4:

- Drop first wave of email invites for live events.
- Add Link to event to autosignature of appropriate personnel.
- Publish event registration link to social.
- Order catering, complete banquet event order (BEO).

Week 3:

- Drop first wave of email invites for online events.
- Remind sponsors to push demand generation.

Week 2:

- Send reminder email invite if necessary to boost registration for live event.
- If sponsors are maintaining separate registration list, ask them to share current registrants.
- Solicit support from sponsor to assist with call-downs if necessary to boost attendance.

Week 1:

- Send reminder email invite if necessary to boost registration for online event.
- Brainstorm topics and target dates for next event so they can be advertised at close of current event.
- Prepare and pitch media alert if appropriate to drive media coverage.

Week 0:

- Confirm catering 3 days prior to event; provide guarantee based on registration.
- Send 3-day and 1-day confirmation emails for live events.
- Send 1-day and 1-hour confirmation emails for online events.

Post Event

- Day of or day after event, conduct debrief with presenters/speakers:
 - What did we learn?
 - Who did we see?
 - What worked well?
 - What could we have done better?
 - Brainstorm topics for next event if not yet determined.
- For online events, send email follow-up with link to recording within 24 hours. (compose this in advance)
- For online events, send email follow-up with offer the following business day. (compose this in advance)
- For live and online events, begin call-downs with offer to attendees the following day. Complete call downs within 1 week.
- For live events, post slide decks to event web site if appropriate.
- For live events, post pictures to social.
- Week after live event, prepare press release documenting details of event and deliver to media or to customer/prospect mailing list as appropriate.
- Week after event, submit paperwork and share registrant/attendee lists to collect co-op dollars if appropriate.

Measure Effectiveness of Event

- How many invites did you send?
- How many registrants did you have?
- How many attendees?

- What was your drop off?
- How does this registration/attendance/drop off compare to prior events?
- Evaluate quality of attendees:
 - How many were customers?
 - How many were prospects?
 - How many were muffin eaters?
 - Did any key prospects attend the event?

- Track business generated as a result of the event:
 - Opportunities identified
 - Proposals generated
 - Business secured

- Calculate Real ROI of event: revenue generated less cost to produce. Consider soft costs if net is close. Consider soft, immeasurable results (impressions, good will, relationships) if net is low or negative when evaluating whether to schedule next event.