



**splash**

Your *Ultimate*  
Event Marketing  
*Playbook*



**Expert Tips and Game Plans for  
Can't-Miss Business Events**

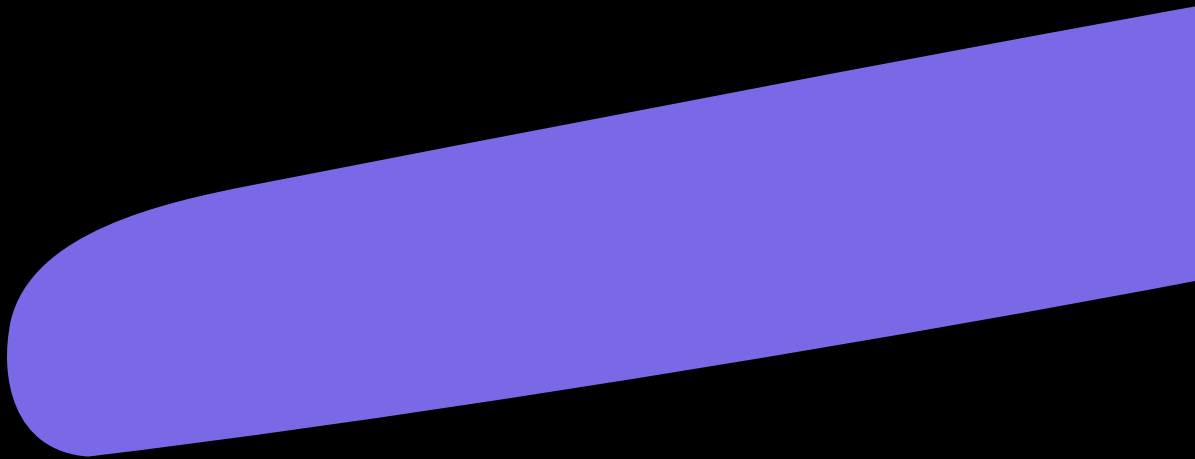


# Contents

<b>Introduction</b>	<b>3</b>
<b>Trainings</b>	<b>6</b>
<b>Recruiting Events</b>	<b>10</b>
<b>Field Events</b>	<b>14</b>
<b>VIP Events</b>	<b>18</b>
<b>Launches</b>	<b>22</b>
<b>Roadshows</b>	<b>27</b>
<b>User Groups</b>	<b>31</b>
<b>Internal Events</b>	<b>35</b>
<b>Definitions of Event KPIs</b>	<b>40</b>
<b>Event Marketers Checklist for Today's Agile Events</b>	<b>42</b>



# Introduction



# Introduction

Some people love it, others loathe it. But in the case of change, we're sorry to break this to you: Your feelings don't matter because change is inevitable.

No one knows this better than marketing teams — event marketers, specifically. And, actually, the **ability to adapt no matter what** might as well be the number-one requirement on every event marketing job description.

Dropped WiFi. Guest speakers backing out last minute. Technology not doing what it's supposed to do. Event marketers need an ironclad backup plan for every single worst-case scenario.

It's not just that event marketers need to be agile while planning and hosting events. They also need to adapt to whatever the events industry throws at them (which we all know has changed dramatically over the years).

Companies that were addicted to big events found that smaller events actually **support better ROI**, so they pivoted their strategy. In-person events were all the rage until a pandemic forced an overnight pivot to virtual events. And ever since, marketers have been thinking about how they'll eventually pivot back to in-person and hybrid events.

We're pretty sure the word "pivot" hasn't been used this much since that iconic episode of Friends aired in the late '90s.

Needless to say, event marketing can be complicated — and there's a reason it's consistently named as one of the most stressful jobs. Your event programs must deliver business results while giving your attendees meaningful, **engaging experiences**.

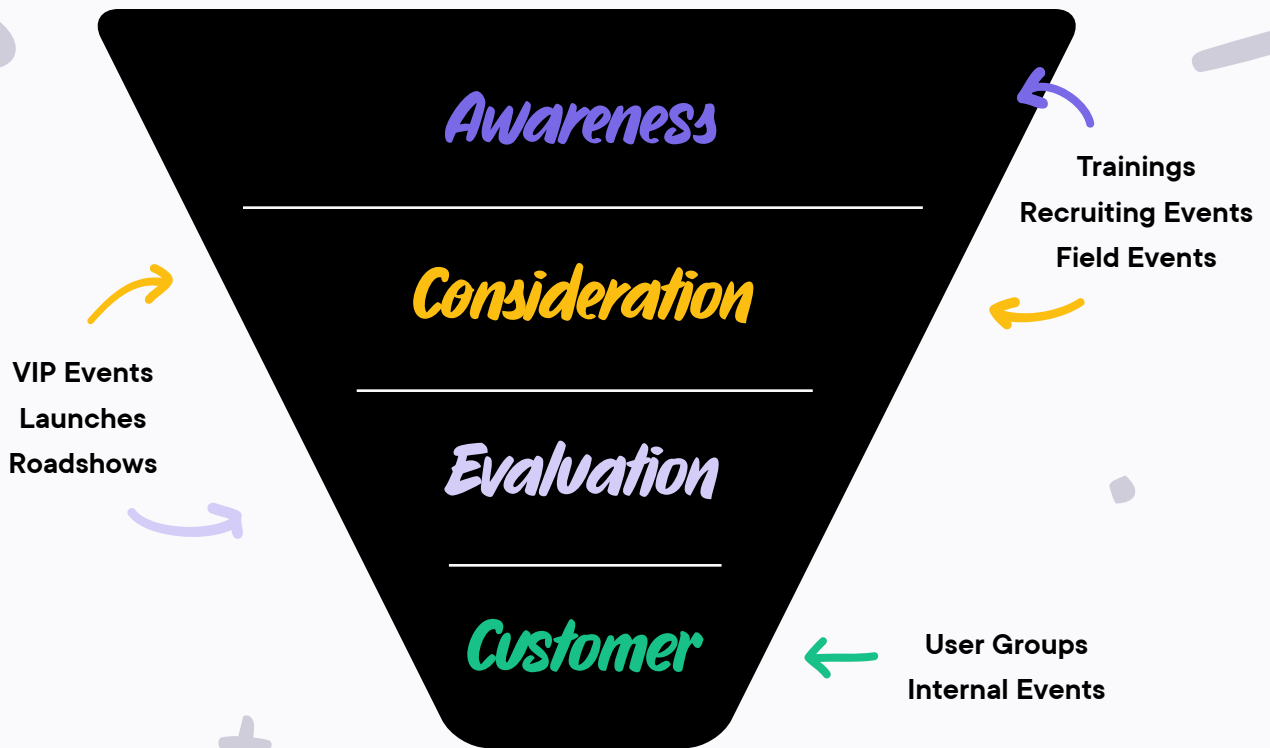
That's where this playbook comes in. And it's not your run-of-the-mill event marketing playbook.

You're an event marketer or someone who cares about the success of your company's event programs. So you don't need us to tell you how to identify your audience, what SMART goals are, or why you need to reconcile your budget.

Instead, we're talking about common event pitfalls (and how to avoid them). Ways to promote your events that'll get people (the right people) in the door. Secrets from the experts on what makes a great event.

Before we dig in, let's quickly talk about how this playbook is organized so you can get the most out of it.

To make navigating this playbook easy, we've placed these eight business events in order of where they typically fall in the sales funnel.

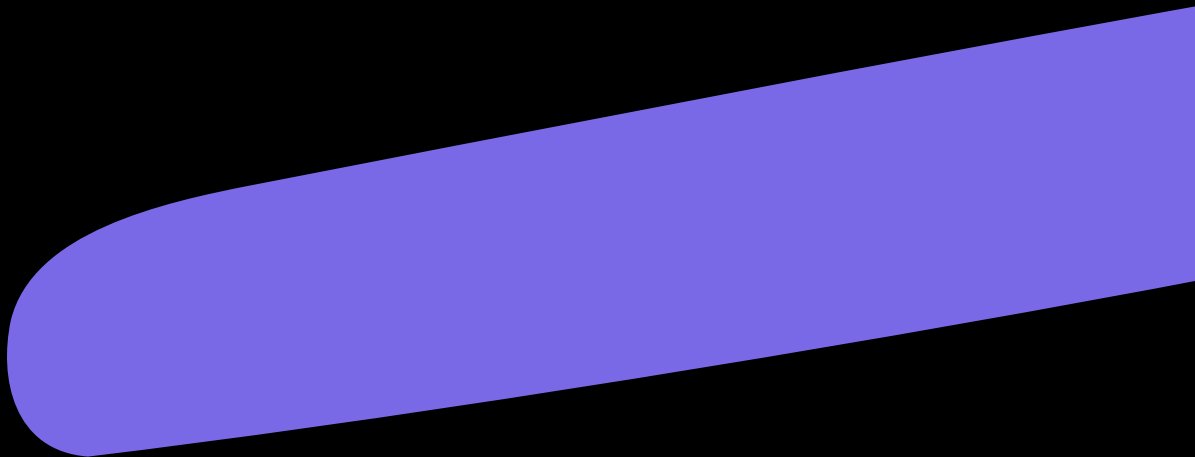


The best part of this playbook: There's something for everyone — whether you run some, all, or none (yet) of these events — and you can easily skip around based on the events that matter most for you.

Now, it's time to dig in.



*The*  
**Trainings**  
*Playbook*



# Trainings

Massive budgets. Substantial resourcing. Significant risk. These reasons, and then some, are why companies have begun **shifting to smaller events**. But it's hard to go cold turkey on big events, like conferences, because of the great training and networking they can offer. That's why training events will always be an important part of the event marketing calendar.

From hands-on workshops to interactive demos, training events offer a powerful, pragmatic approach that takes your content beyond the realm of "thought leadership" to deliver experiences that educate your buyers and help them apply that newfound knowledge.

## Common Pitfalls with Trainings

1. **Treating it as a lecture:** Your attendees aren't solely here to listen. They also want to *do*. Give your speakers a break and give your attendees time to work and interact with your lesson content — and with each other.
2. **Ignoring follow-up plans:** Just because the event is over doesn't mean your job is done. Send them the materials you used during the event, customer stories that they'll find inspirational, or other relevant content.
3. **Not having a Plan B:** What happens when the WiFi goes out? When your audio doesn't work? When your slides begin to stutter? Come prepared with things like offline activities and physical notecards to help mitigate risk.

## Tips to Promote Can't-Miss Trainings

1. Create an **event page** with a **clear title and descriptive subtitle** above the fold. Most guests will make their decision whether or not to attend on this first look.
2. Build an email sequence with the **right messaging**. (Hint: They want to know what's in it for them. What will they learn that they can immediately apply?)
3. If you're targeting prospects, don't forget to leverage **branded share cards** that your team can share on social channels and generate even more interest.
4. Targeting customers instead? Subtle banners on your website and **in-product tools** (for software companies) are also great opportunities to promote your event.

### Pro Tip

In his more than six years at Splash, Product Marketing Director Zach Napolitano has run multiple trainings each week. He suggests sending a plain-text invitation from the trainer to give it an ultra-personal vibe. As for length? Zach finds that anywhere between 70 and 130 words is his sweet spot.

## Secrets of Amazing Trainings from the Pros

“I have always found that attendees are more willing to engage and come to your event if they have had a chance to inform what the event is about. I always put a section in the registration form asking attendees to submit a question they’d like answered or a specific topic they would like to hear covered. When people have that opportunity to provide input, they are invested in attending the event to hear their questions answered.”



**BRITNEY PIERINI**  
HEAD OF EMPLOYEE EXPERIENCE  
BREAD

“Your opening remarks and agenda are crucial. Attendees usually come into a training event with a certain level of anxiety about the materials. This is your opportunity to set the expectation that the content will be digestible, give them a sense of direction, and allay anxiety that a certain topic won’t be covered.”

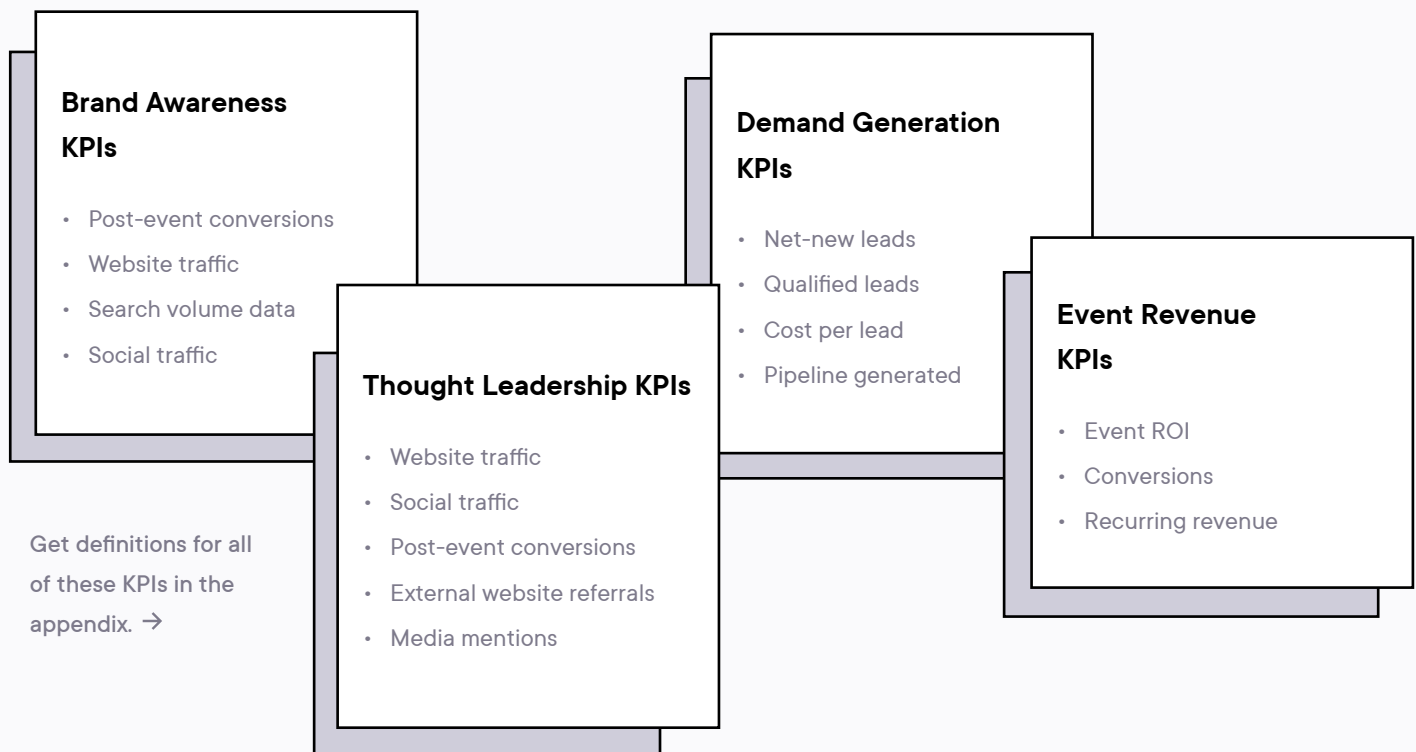


**ZACH NAPOLITANO**  
PRODUCT MARKETING DIRECTOR  
SPLASH



## Critical KPIs to Measure Trainings

Training events can be broadly defined, which can make measuring success a challenge. Depending on what you want to achieve, these are some KPIs you might want to consider.



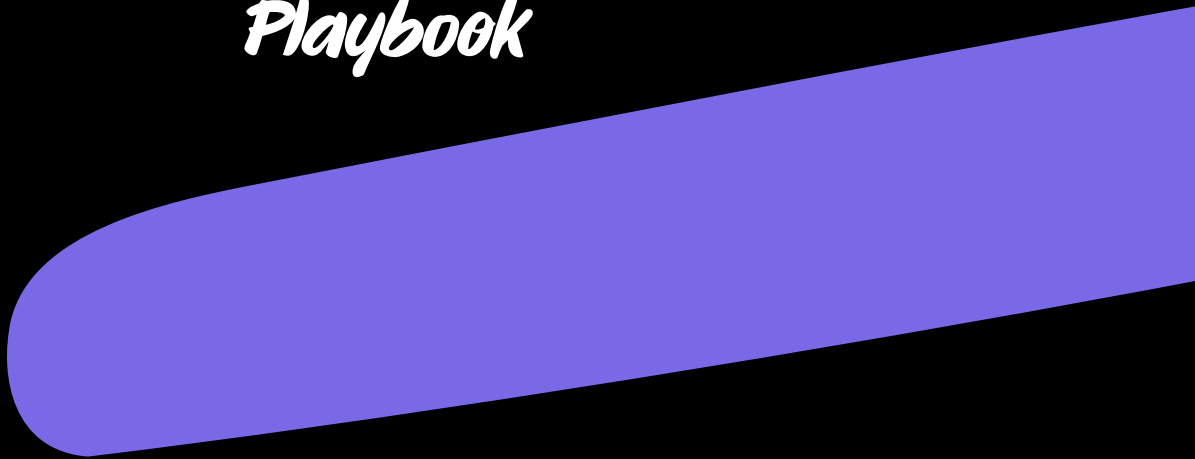
## Hosting Virtual & Hybrid Trainings

The online version of a training event is most often similar to a traditional webinar — one of the most (if not the most) popular virtual event formats. Even if you experiment with other formats, statistics say you'll end up hosting a lot of webinars.

Do yourself a favor: Create a **branded theme** in your event marketing platform designed specifically for webinars. It'll make your life so much easier every time you need to create a new event. (Bonus points if it'll automatically spin up a corresponding program in your CRM and marketing automation systems.)



*The*  
Recruiting  
Events  
*Playbook*



# Recruiting Events

The smartest leaders know there's nothing more important than having an incredible bench of employees ready to knock their work out of the park. **Great recruiting events** can differentiate your employer brand and engage your talent pipeline in ways no other channel can.

With recruiting events, you can give candidates an extraordinary brand experience and your team the opportunity to find new talent. And whether you're hosting an hour-long "speed dating" style interview event or a multi-day career fair, all the tips below still apply.

## Common Pitfalls with Recruiting Events

1. **Skimping on your event materials:** Not investing in high-quality event branding is a mistake. Banners, swag bags, virtual backgrounds — now is the time to immerse your candidates into your brand and get them excited about your company.

### Pro Tip

Event invitations should be personalized as much as possible, but it's a must for recruiting events. After all, candidates are interviewing you just as much as you are interviewing them. Have the invites come from the executive sponsoring the event, such as your CTO for a tech recruiting event.

2. **Not tracking attendee data:** It can be hard to tie hires back to a recruiting event, but you need that data to know what's working. An easy way to make that happen: Use an event marketing platform that integrates with your **applicant tracking system**.
3. **Swarming candidates with recruiters:** If you're hosting an interview event, it's hard to bypass this. You can balance it though, by having executives or team leads attend so candidates can get a genuine feel for how it would be working for them.

## Tips to Promote Can't-Miss Recruiting Event

1. Build an event page that clearly shows **why candidates should attend** and why your company is so great. If you have amazing perks, tell them fast.
2. Recruiting events can be stressful for candidates. Create email invitations and reminders that explain exactly **what they should expect** at your event.
3. There's one place you can count on finding job candidates, and that's online. Reach the right ones by **creating share cards** for your social channels.
4. If you're **teaming up with a college** or university for your event, leverage those relationships. Ask them to help promote your presence at the event.

## Secrets of Amazing Recruiting Events from the Pros

“If everyone attending your event as a company representative shares a similar race and gender identity, it sends a message that you don’t value equality and inclusion. A close friend of mine recently had a candidate turn down a job offer as a software engineer because her five rounds of interviews only included men. Ensure a diversity of voices whenever possible.”



GARY GOLDMAN  
SENIOR PROGRAM DIRECTOR  
OUT IN TECH

“Analyzing and understanding your metrics at a holistic view is the key to future success with your recruiting events. Determining what impact your event had on guests — your candidates — will help you strategize and plan future events. The most meaningful insights we use to attract the best candidates: event page clickthrough rate, channel funnels, and repeat registrations.”



CINDY LIEN  
OPS COORDINATOR, GLOBAL EMPLOYER BRAND & MARKETING  
FACEBOOK

## Critical KPIs to Measure Recruiting Events

Since your goals for recruiting events are probably to build brand awareness and develop the talent pool, focus on these KPIs when measuring success.



### Brand Awareness KPIs

- Post-event conversions
- Website traffic
- Search volume data
- Social traffic

### Recruiting Event KPIs

- Candidate experience
- Conversions
- Acceptance rate
- Time to hire

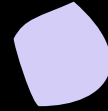
Get definitions for all of these KPIs in the appendix. →

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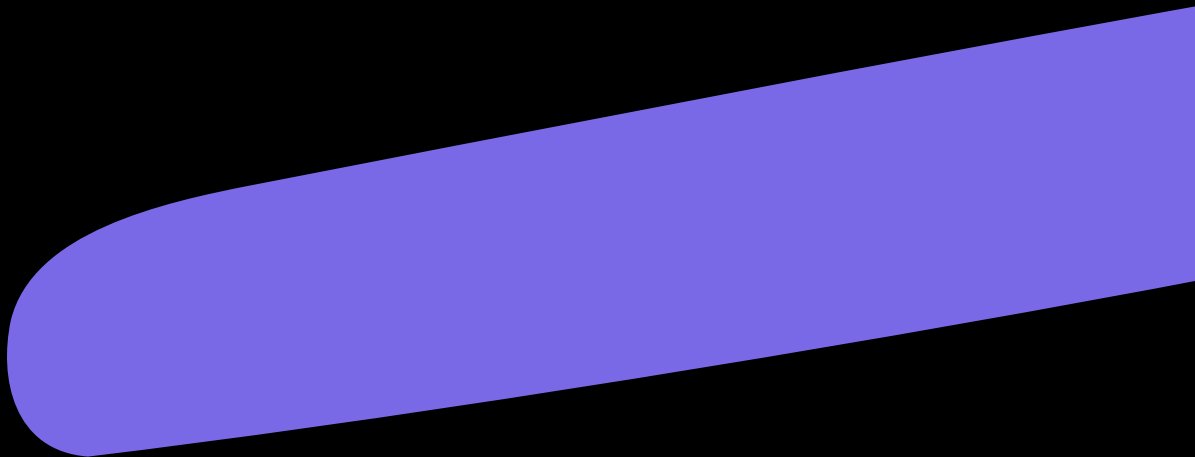
## Hosting Virtual & Hybrid Recruiting Events

Whether your recruiting event venue is your company's lobby or a virtual meeting room (or both), candidates want the same thing: to learn about the people, what the company stands for, and what it would be like on the inside.

That's why you need to immerse your candidates as deeply as possible into your brand when hosting virtual events. Invite a diverse group of representatives from your company. Share a virtual tour of your office. Schedule one-on-one breakout conversations. And ensure **every touchpoint is on-brand**.



*The*  
**Field Events**  
*Playbook*



# Field Events

Teaching a workshop. Leading a roundtable discussion. Showing off a demo. Meeting for happy hour. When we say field events can take many forms, we mean it. These outings are often hosted by local sales reps (with or without the support of a field marketer) to connect with your most important buyers authentically.

Field events can look like nearly every event type in this playbook. This opens the door for a lot of possibilities — but also for inconsistencies and unpredictability. That's why your field marketing strategy must be set up to allow for variety, but also set the right guidelines to maintain brand guidelines and **compliance**.

## Common Pitfalls with Field Events

1. **Spraying and praying:** Field events are effective, but not when you batch-and-blast the entire region. Ditch the spray-and-pray tactics and work across sales and marketing to accurately identify and meaningfully engage your top targets.
2. **Going rogue:** Sales teams don't always know what is and isn't brand compliant. Consider creating a clear set of field event guidelines, while using a central hub or technology where anyone in an organization can use marketing-approved materials.
3. **Not getting into the details:** Your attendees' attention should be on your content — not their growling stomachs. Include a dietary restriction question on your registration form to make capturing these details easy.

### Pro Tip

If you have multiple sales reps supporting an event, launch an internal contest to see who can get the most registrations. Today's technologies have features like **tracking links** that you can build for each contestant. This lets you figure out who's bringing in the most attendees — and gives sales reps an incentive to connect with their targets.



## Tips to Promote Can't-Miss Field Events

1. Create an **event page** that clearly shows **what attendees are signing up for**. Nothing's worse than arriving at an event that's nothing like what was promised.
2. Because your email list for field events is highly segmented, this lets you create a much more **personalized outreach cadence**. Don't miss out on that.
3. Give the people who have already registered an opportunity to **bring a plus one** (specify business contacts only, if you'd like). This can make your attendees feel more comfortable at your event and build your database at the same time.



### Secrets of Amazing Field Events from the Pros

“Take the time to think about what the goals are for your audience — what you want them to feel, learn, and experience. As tempting as it is to add bells and whistles to your event and your event page, make sure the purpose for the event is clear and concise. Keeping it simple but valuable can be much more important than creative but complicated.”



HELEN WO  
FIELD MARKETING MANAGER  
SLACK



## Critical KPIs to Measure Field Events

Since your goals for field events are likely to build brand awareness, generate new demand, and drive sales, here are the KPIs to consider when measuring success.

### Brand Awareness KPIs

- Post-event conversions
- Website traffic
- Search volume data
- Social traffic

### Demand Generation KPIs

- Net-new leads
- Qualified leads
- Cost per lead
- Pipeline generated

Get definitions for all of these KPIs in the appendix. →

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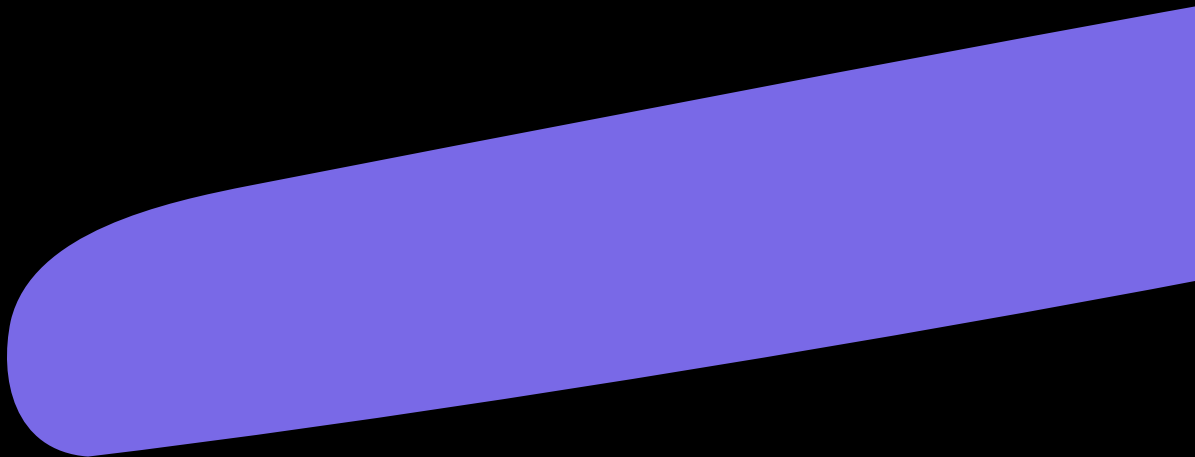
## Hosting Virtual & Hybrid Field Events

In the case of field events, going virtual shouldn't mean going large. Yes, one of the benefits of virtual events is the ability to reach more people. But with virtual field events, the need to keep them intimate and personalized becomes more amplified.

Find out what your audience likes to do and cater your event to those preferences. (We've heard every example under the sun: wine tastings, baking classes, and even escape rooms.) But more than that, ditch the presentations and make it just about the experience. People are craving human connection — and if you can give that to them, they'll remember you for it.



*The*  
VIP Events  
*Playbook*



# VIP Events

First impressions are everything, especially when you're dealing with VIPs. Sure, all events aim to make their attendees feel special, but VIP events take this endeavor to another level.

Hosting VIP events means going beyond simply knowing what your attendees want — it means understanding what makes them tick, what keeps them up at night, and what drives them every day. And, most importantly for the success of your event, it means knowing exactly what it takes for them to step foot into your event.

VIP events provide a unique, exclusive experience for high-priority prospects, customers, or partners. Business leaders often hand-pick the guest list for these events, and guests are usually close to (if not already) working with you.

## Common Pitfalls with VIP Events

1. **Forgetting the reason you're there:** If you invite your top prospects to an NFL game suite, you may want to spend halftime gorging on beers and the nacho bar. Instead, use any opportunity to connect one-on-one.
2. **Not sending a save the date:** VIPs are often senior-level professionals with busy lives, so it can be hard to find the perfect time to host a VIP event. Look at data from your previous VIP events to understand what works best for your target audience.

## Pro Tip

Martín Martínez, Founder of A-Player Media, is on the advisory board for SXSW, the largest gathering of creative professionals in the world. He suggests sharing names of other VIPs attending (with their permission, of course) with guests who haven't yet confirmed their attendance. This drums up buzz and gives attendees an idea of event networking opportunities.

3. **Forgetting the follow-up:** If you don't personally follow up after a VIP event, you're missing a huge opportunity to continue the conversation. These follow-ups are also great ways to get feedback on what they liked (and didn't) at your event.

## Tips to Promote Can't-Miss VIP Events

1. Senior-level professionals usually have their pick of events to attend, so you need to stand out — and their **go-to place for event details** (an event page) must be branded, eye-catching, and informative.
2. Send **one-on-one, personalized email invitations**. We always prefer these kinds of invitations, no matter what type of event, but they are especially important for VIPs. Creating an intimate experience from the start will help you drive more registrations.

## Secrets of Amazing VIP Events from the Pros

“For VIP events like executive roundtables, the secret sauce is in asking the right questions to get your customers and prospects to share their experiences with one another, then listen with empathy. You must elevate the conversation beyond the product and highlight the resources you bring to the table for the success of an executive. Be sure to prepare a briefing document in advance that the event host can reference to call upon individuals for relevant discussion points at the right time and connect the dots between people who can learn from each other.”



ALLY MASI  
SENIOR MANAGER, SMB EXECUTIVE EVENTS  
SALESFORCE

“One of the most important things for VIP events is to nail the personal touch. On a basic level, know your guests by name, where they work, and their role. But I always like to go the extra mile. If you’re hosting an in-person event, stand up at check-in like a concierge and personally walk each guest to where they need to go. Have a prologue ready for your quick walk, so they’re primed for the event.”



MARTÍN MARTINEZ  
FOUNDER & PRESIDENT  
A-PLAYER MEDIA

## Critical KPIs to Measure VIP Events

Since your goals for VIP events are likely to drive sales and/or improve retention and loyalty, you can use this list of event KPIs to get your measurement going.



### Event Revenue KPIs

- Event ROI
- Conversions
- Recurring revenue

### Retention and Loyalty KPIs

- Net Promoter Score
- Renewal rate
- Recurring revenue
- Engagement level & health scores
- Referral

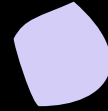
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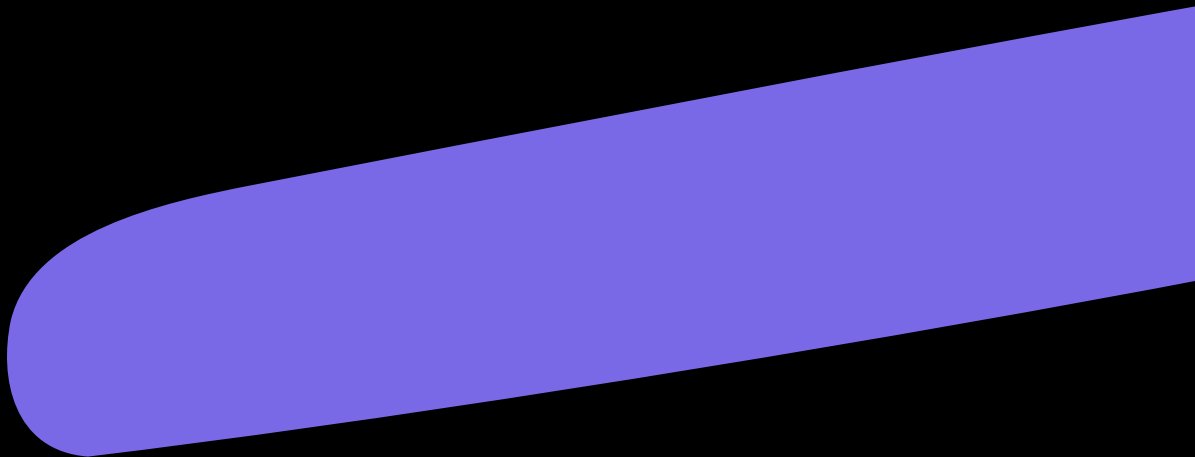
## Hosting Virtual & Hybrid VIP Events

VIP events are all about the special, exclusive treatment and having meaningful conversations. So with virtual and hybrid events, we're challenged to think outside the box — especially if you're having a hard time recreating the vulnerability needed for events like executive roundtables.

Ally Masi, Senior Manager of SMB Executive Events at Salesforce, suggests offering a shared bonding experience first that can help set the stage for deep connections — like a virtual cooking class or chocolate tasting. Whatever the experience, take a hyper-local approach whenever possible, such as a beer-tasting event featuring local breweries and snacks.



*The*  
Launches  
*Playbook*



# Launches

When you have a new product or service, one of the best (read: most effective) ways to let the world know is through a launch event. This type of event should (rightfully) place your new product or service centerstage. But it's important to remember that it's not only about you — it's also about your attendees and their experiences.

Think about the big industry launch events for giants like Apple and Google. While their new products are the reason for bringing everyone together, they also ensure the audience has memorable, unique experiences as they listen, learn, and engage throughout the event.

## Pro Tip

An overarching event theme can make the entire experience of your launch event feel much more unified and consistent. And, it gives you a central idea to rally around when it comes to your promotions and follow-ups (among other things). Make sure all of your promotional materials look and feel the same way.

## Common Pitfalls with Launch Events

1. **Fluctuating launch dates:** New product launch dates can be tricky to confirm. Before planning your launch event, have a workable product demo to showcase. Otherwise, you'll feel like you're playing catch-up as the event date gets closer.
2. **Not involving brand experts:** Staff your event with a mix of people across teams to ensure you have the right coverage and the right expertise to answer any question your attendees might have — including about the broader brand.
3. **Delivering poor hands-on experiences:** If technical issues start appearing, it can lead to a terrible first impression for your users. Have backup units or isolated environments on standby that can replace any malfunction should one arise.



## Tips to Promote Can't-Miss Launches

1. Create a thoughtful **social media campaign**. Take over your channels with branded assets and messaging so it's the only thing you're talking about.
2. Distribute a **press release** and let relevant reporters know it's happening. Then, make sure to get them in touch with your brand experts for interviews.
3. Really **hone in on the WIIFM factor** on your event page. Yes, it'll be centered around your new product or service, but why should they care? Tell them.
4. If not done right, launch events can be boring. In your email invitations, give **exclusive previews** of speakers, activities, giveaways, or anything else eye-catching.

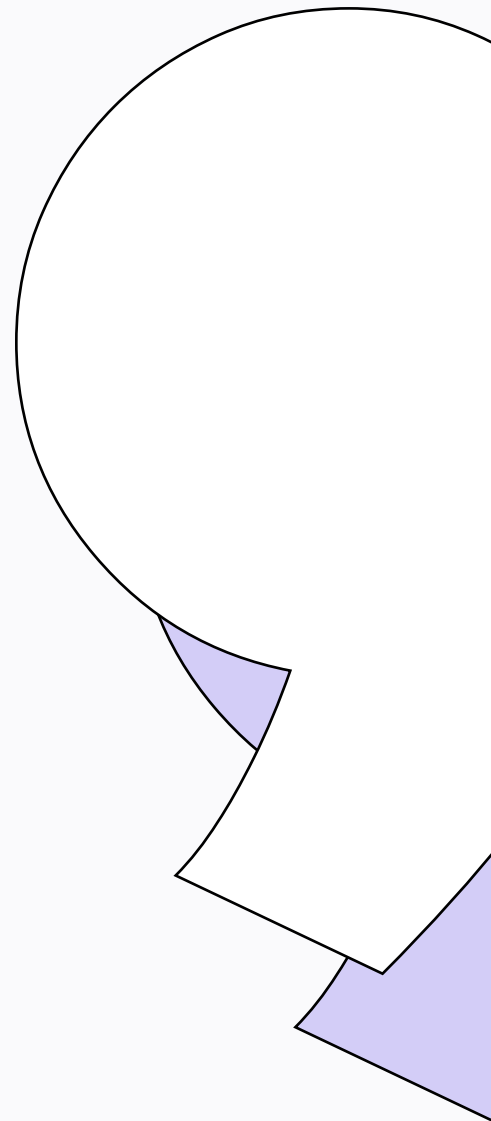


## Secrets of Amazing Launches from the Pros

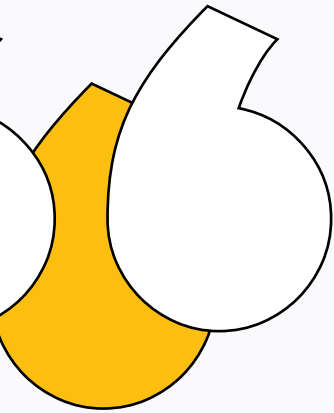
“Even if you're launching a product, and your attendees know it's a product launch, make your event about the people — not the product. What keeps your audience up at night? What challenges do they face every day? What gives them FOMO? If you address these questions, they'll come to the conclusion themselves that your newest product is a must-have.”



SASHA PASULKA  
VICE PRESIDENT, MARKETING  
SPLASH







“To ensure engagement at an event, I work closely with the customer success team to identify customers who have great use cases and are charismatic speakers. Once we identify those customers, we ask them ahead of time to volunteer to speak when we engage the audience, as it’s always hardest getting the first person to talk. Once you get the conversation going, it usually flows well from there. This is also a great tactic to use if you can’t get official approval for that company to be on the agenda but still want to share their story.”

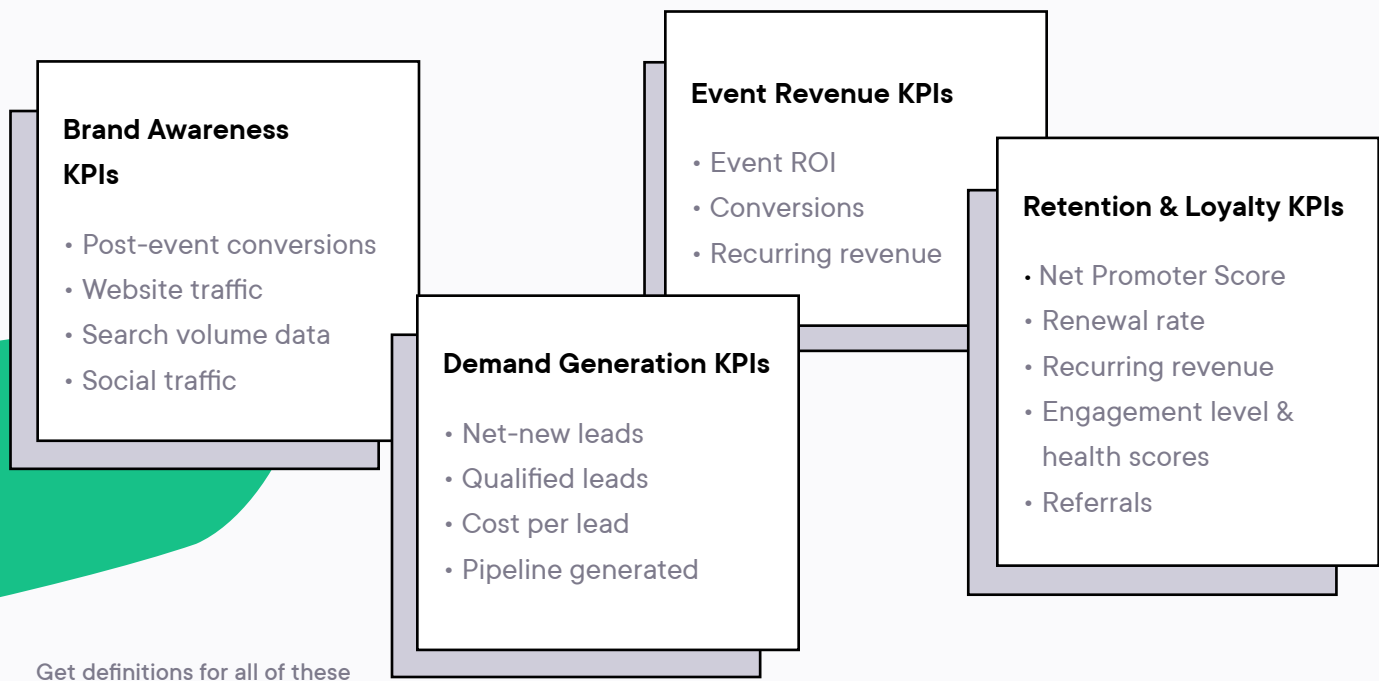


ALISON BENSCH  
HEAD OF GLOBAL EVENTS  
CLOUDINARY



## Critical KPIs to Measure Launches

Your launch event goals could be to build awareness, generate demand, drive revenue, or improve retention and/or loyalty. Figure out what you want to achieve, then consider these KPIs to measure success.



Get definitions for all of these KPIs in the appendix. →

## Hosting Virtual & Hybrid Launches

It's hard to recreate virtually the interactivity and hype of in-person launch events — but it's not impossible. In fact, there's one simple secret to ensuring your event is just as exciting from behind a computer screen: having the right hosts.

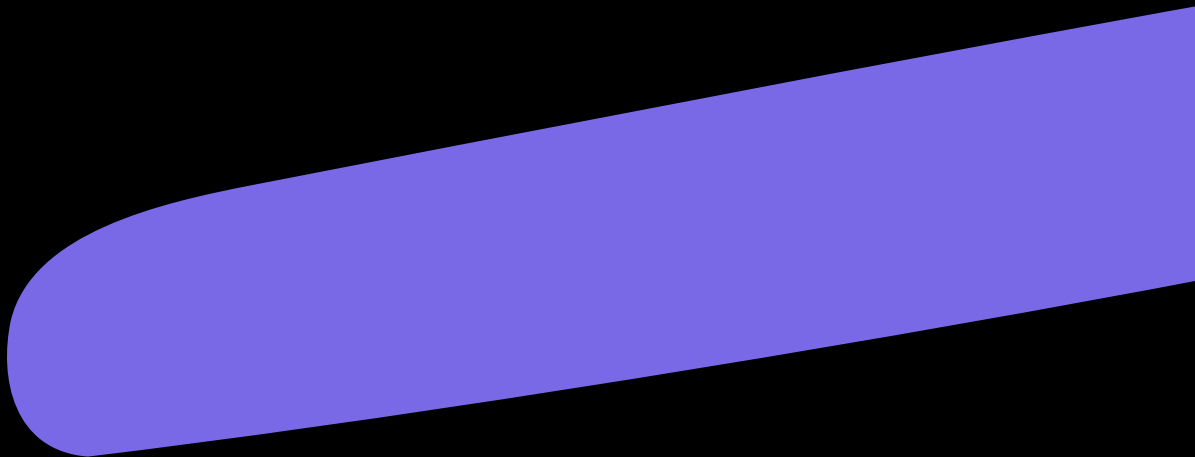
Recruiting the right hosts to emcee your virtual or hybrid launch event can make or break it. Leave your event in the hands of one quiet, monotone host, and you're in for a disaster. But let two engaging, expressive co-hosts take the mics, and you're much more likely to have attendees who are excited about spending time with your team, learning about your newest product or service.



*The*

Roadshows

*Playbook*



# Roadshows

Roadshows are no small endeavor. Hosting back-to-back events over the course of weeks or months. Traveling to multiple cities to reach the right people. Speaking about the same general topics over and over. If they sound like a lot, it's because they are.

These events take place in cities with strong representation or potential representation, and they are designed to engage otherwise hard-to-reach decision makers. But unlike other event types that invite buyers to come to you, with roadshows, you go to your buyers to make their ability to engage effortless.

## Common Pitfalls with Roadshows

1. **Doing the same stuff on different days:** You should have some consistency in the structure event to event, but don't treat every event the same. Personalize your content so it addresses differences in location, pain points, and goals.
2. **Choosing the wrong cities:** Pick cities and regions that make sense based on your target audience. These areas might not always be the major metropolitan cities. Work cross-functionally to figure out which areas will be most lucrative.
3. **Ignoring any red tape:** Not planning for the local rules and regulations beforehand could spell disaster. Be aware of the event space, parking options, routes and directions, city noise curfews, and the like.

## Tips to Promote Can't-Miss Roadshows

1. Since roadshows go from city to city, avoid using the same email invitations for each one. Use a **personalized, regionalized approach** to connect early with your audience.
2. Use your event page to show exactly **what attendees are signing up for** and what's in it for them. Give them a reason to take time out of their day to attend.
3. What does your audience want to get out of your roadshow? If you let them influence the content and activities, they're more likely to participate. Ask them using a **custom question in your registration form**.



### Pro Tip

Promoting your roadshow isn't just about getting registrations. It's also about getting registrants to actually attend. Lisle Friedman, Director of Marketing at true[X], has found success partnering with charities to encourage attendance. "At our Charity Engagement Roadshow, we took a product demo to agencies in Chicago. For everyone who completed the demo, we donated \$1 to Off The Street Club. By showing up, they helped to make a difference in their community."

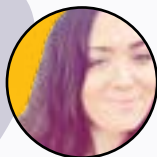
## Secrets of Amazing Roadshows from the Pros

“With roadshows, people always come in waves. Dozens of attendees will show up at once, then you’ll have stretches of time with no one at all. And if there’s a wait at the door, people are more likely to leave without ever talking to you. We use a great check-in app to make the line move fast, and our entire team has access to it — so if the line starts to bottleneck, we can pull anyone from any station to help. The more people you equip to support check-in, the less drop-off you’ll see. Offering tacos and margaritas never hurt, either.”



LISLE FRIEDMAN  
DIRECTOR OF MARKETING  
TRUE[X]

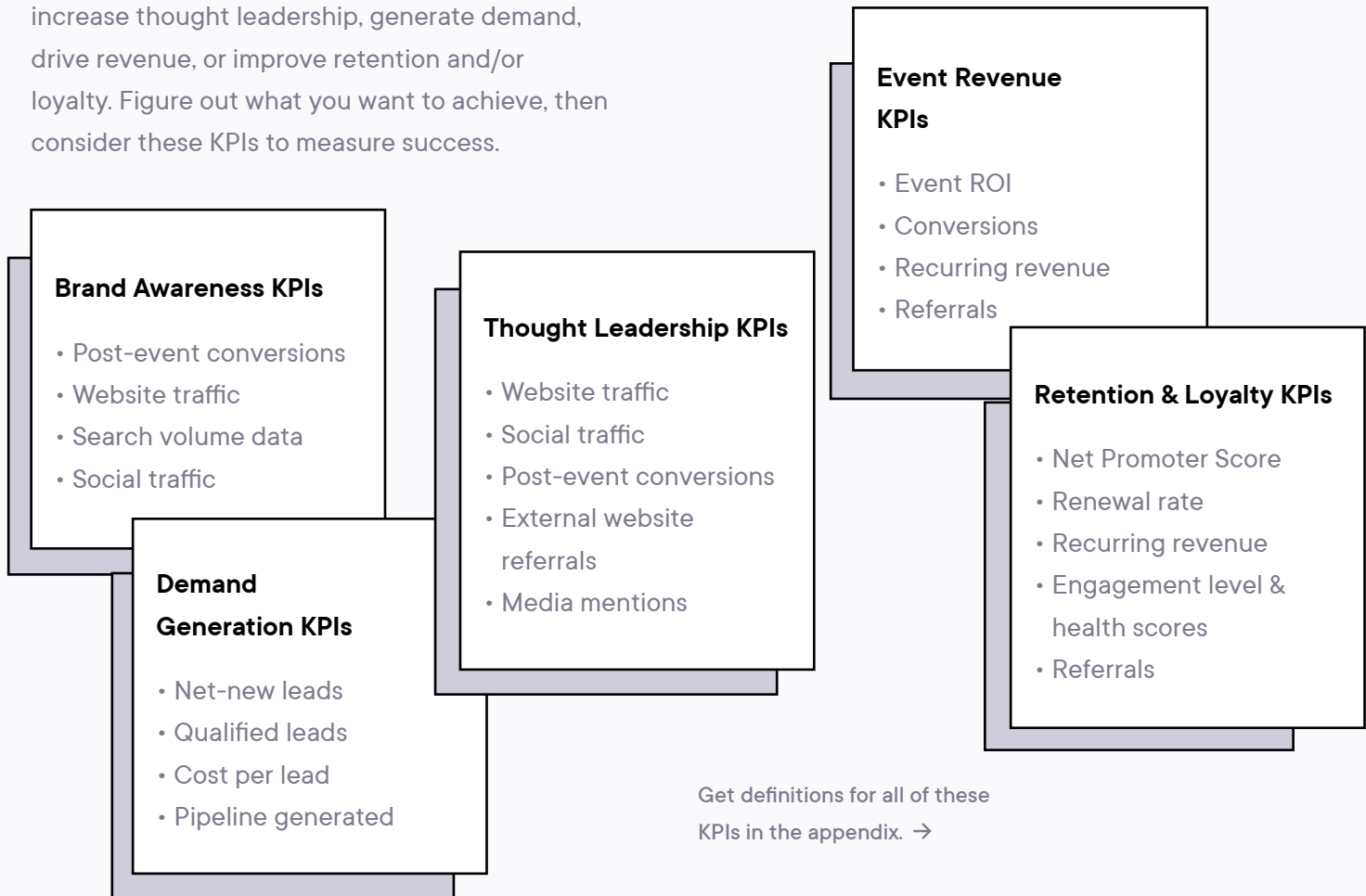
“If you’re hosting a virtual roadshow, encourage attendee engagement by sending them an artifact in the mail prior to your event. This could be as simple as branded swag, or something interactive like a cocktail kit. Also, keep your presentations much shorter (I’d even go so far as cutting times in half). Humans have short attention spans, and even shorter ones when behind a screen.”



ZENA DAVÉ  
EXPERIENTIAL MARKETING MANAGER  
LAUNCHDARKLY

## Critical KPIs to Measure Roadshows

Your roadshow goals could be build awareness, increase thought leadership, generate demand, drive revenue, or improve retention and/or loyalty. Figure out what you want to achieve, then consider these KPIs to measure success.

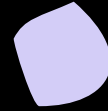


## Hosting Virtual & Hybrid Roadshows

The beauty of roadshows is that you can hyper-customize each event based on location. It's one of the best ways to differentiate what are all too often the same program over and over (and over).

Going virtual with your roadshows shouldn't be an excuse to recycle agendas word-for-word or broaden your invite list. Keep your planning

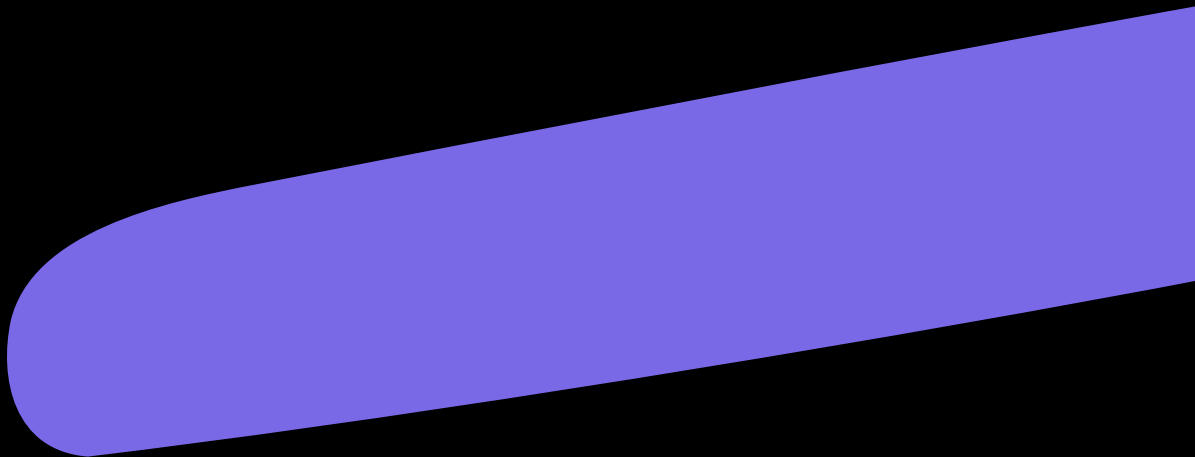
focused on the locations that matter most (where your audience is). Invite speakers who may have a connection with those locations. And most importantly, give your guests a community outlet to connect with others in their area, like a Slack channel or LinkedIn group.



*The*

# User Groups

*Playbook*



# User Groups

Joining a fitness center, volunteering at a local organization, and even attending the neighborhood's block party. No matter what one's interests, people crave community. This is no different in our work lives, which is why we seek events like user groups.

User groups bring together people who can share strategies and best practices for using a product. And today, they're becoming an important part of building customer marketing programs, nurturing customer relationships, and improving customer loyalty. Plus, user groups are a great way to gather product feedback straight from the source.

## Common Pitfalls with User Groups

1. **Keeping things unstructured:** User groups, like any other communication, should be held on a regular cadence. Whether that's monthly, quarterly, or something else, users should know when to expect their next meetup.
2. **Choosing the wrong location:** Sometimes, your user hotspots aren't where you think they are. Before you try to start a chapter anywhere, spend time properly diving into your user data to ensure sufficient turnout.
3. **Not involving your users:** User groups have the word "user" in their name for a reason. If you don't let your users help identify content, you may not address what really matters to them — and they won't be engaged.

## Pro Tip

Your team may be responsible for managing the event build and marketing. But letting your customers lead the charge can help create a really powerful user group program. If you're starting a San Francisco user group, for example, recruit one of your super users in that region to be the group's leader and determine what to present that'll get people in the door.

## Tips to Promote Can't-Miss User Groups

1. Extend your user groups beyond the event itself and **connect everyone online** too — in a Slack channel, for example. They can continue the conversation and you'll have another place to promote your events.
2. Create an event page that **highlights your customer speakers** and their topics. Your attendees want to know who they'll learn from, which brings us to...
3. Give all attendees an opportunity to ask questions ahead of time. Use a **custom question in your registration form** to do this.

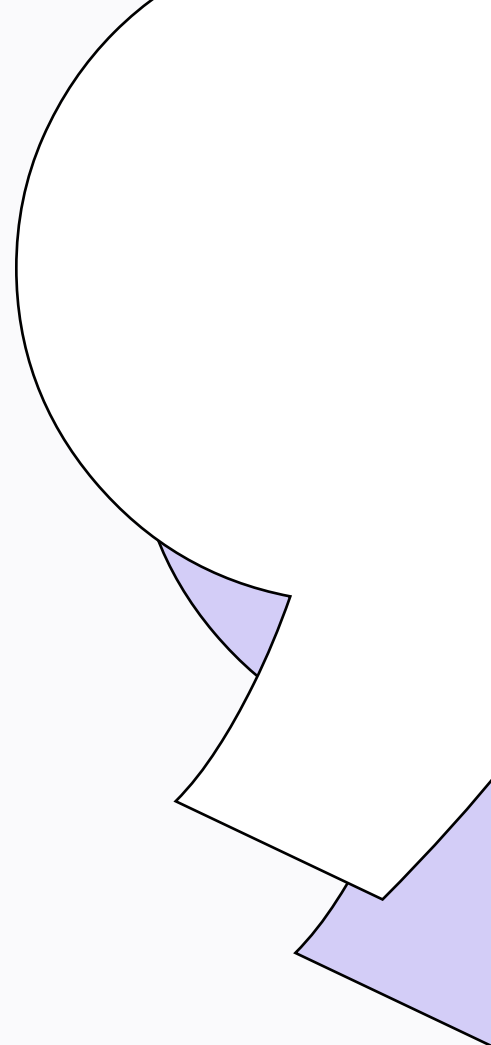
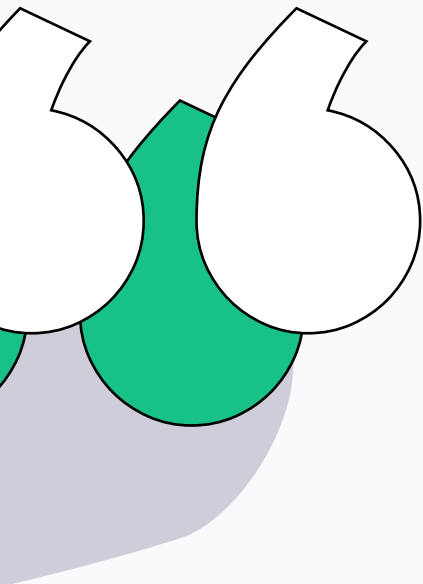


## Secrets to Amazing User Groups from the Pros

“Since adapting to a virtual format, we’re using functions like chat and live polls to figure out what our members wish to discuss at the next virtual meetup and to keep it as interactive and engaging as possible. One of my biggest takeaways: experiment. Now is the time. Everyone is learning and adapting, so be open to suggestions from your audience. Also, make it short and sweet. No one wants to (or has time to) sit through two hours of presentations.”



MEGHANN KEOGH  
PROGRAM MANAGER, USER GROUPS & CUSTOM EVENTS  
HUBSPOT



## Critical KPIs to Measure User Groups

Since your goals for user groups are to drive sales and/or improve retention and loyalty, consider these event KPIs when measuring success.



### Event Revenue KPIs

- Event ROI
- Conversions
- Recurring revenue

### Retention and Loyalty KPIs

- Net Promoter Score
- Renewal rate
- Recurring revenue
- Engagement level & health scores
- Referrals

Get definitions for all of these KPIs in the appendix. →

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## Hosting Virtual & Hybrid User Groups

User groups are usually structured by location. And while you might still continue with this format even during virtual-only times, you have so many more opportunities in front of you. Talk to your user group leaders to find out what's important to them today, and choose topics based on their challenges and successes.

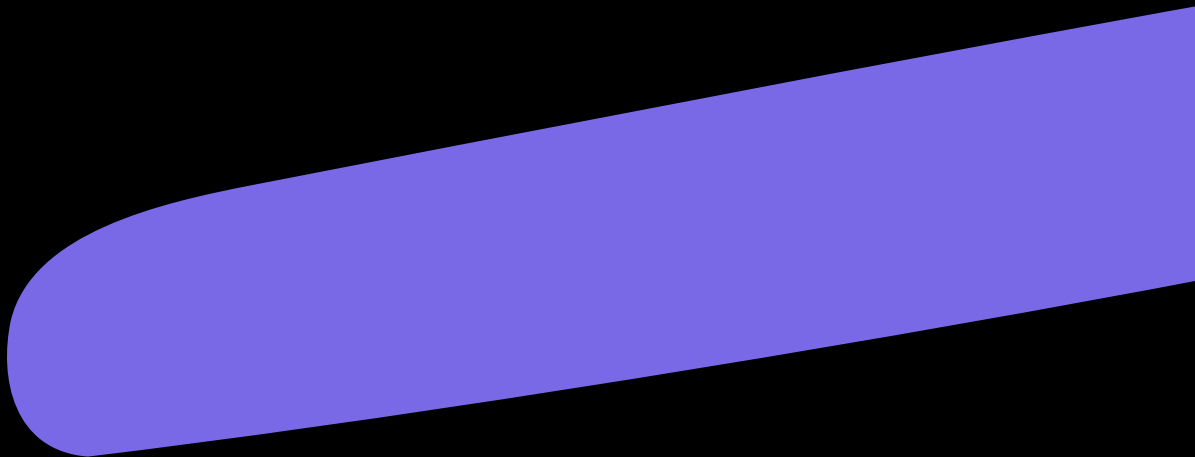
But don't stop there. Encourage your leaders to push the envelope. Test new methods of content delivery, broaden speaker personas, and test new streaming platforms until they find something their group really loves. Virtual settings give leaders and their groups the ability to define unique personalities that may not be applicable in a live setting.



*The*

# Internal Events

*Playbook*



# Internal Events

Companies spend thousands, if not millions, of dollars each year on events to reach their external audiences. But what about their internal audiences? When you find talented employees, you do everything in your power to invest in their happiness and potential.

Hosting internal events — from all-hands meetings to incentive trips to team-building activities — is one way to keep your most important assets (your people) in-the-know and engaged. These events can not only improve communication and collaboration across departments, but they can also help deliver feedback and nurture employee loyalty.

## Common Pitfalls with Internal Events

1. **Working in silos:** Even though event marketers know event marketing, department heads know their departments. Internal events are always more successful when marketers can embrace others' willingness to help.
2. **Deprioritizing your people:** Don't overbook yourself with other meetings or work while supporting an internal event. Just like any other audience, they deserve your full attention, and your stakeholders will notice if they don't get it.
3. **Forgetting the feedback:** Actionable feedback is valuable no matter what kind of event. Even though internal events aren't generating leads or sales, you still want to make sure you're giving employees engaging, meaningful experiences.



### Pro Tip

Even with the best internal event promotions, it's important that each department understand why an event is a must-attend for them. Get your managers aligned so they are empowered and excited to cascade invites to their individual teams. When the invitation comes directly from their manager, employees will be much more likely to join the event and stay engaged.

## Tips to Promote Can't-Miss Internal Events

1. Build a **fully branded event page**. When your employees see your brand in full force, it's a reminder of why they're with you. To build even more excitement, announce a hands-on activity or gamify your event.
2. If you're an email-heavy company, **create an email series** that teases parts of your event plus gives them the details they need. The more informative you are, the fewer questions you'll get ahead of time.
3. If your company prefers Slack or another communication tool, start an **internal events channel** where you can promote the event, answer FAQs, and keep the conversation rolling post-event.

## Secrets to Amazing Internal Events from the Pros

“Ask yourself: How can we initiate informal conversations by way of internal events? Our Leadership Bites series gives a small group of employees the chance to connect with leaders (for example, our Head of People Operations recently led a chocolate-making group). They're open to all employees, but limited to maybe 10 people to keep them intimate. It gives team members who wouldn't ordinarily interact with each other the opportunity to get to know each other.”



NICO SAHI  
GROWTH MARKETING MANAGER  
GUMGUM

“All-hands meetings are a great place to share updates, celebrate milestones, connect teams, and drive alignment. But to break up the monotony of the usual announcements, bring in new speakers, like other employees or external guests (even a client). We do a program called IX Shares, where we incorporate casual storytelling into our all-hands meetings. Employees from all offices can submit stories, and we select new people each time to join us on the main stage — either in-person or virtually.”



MARISSA MAGUIRE  
HEAD OF EXPERIENTIAL MARKETING  
INDEX EXCHANGE

## Critical KPIs to Measure Internal Events

Since your goals for internal events are to boost employee retention and engagement, there are four KPIs to consider when measuring success.

Get definitions for all of these KPIs in the appendix. →

### Employee Engagement KPIs

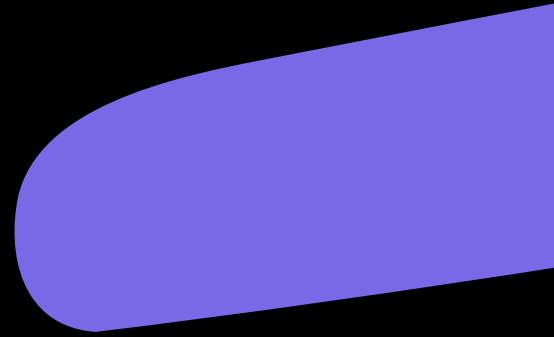
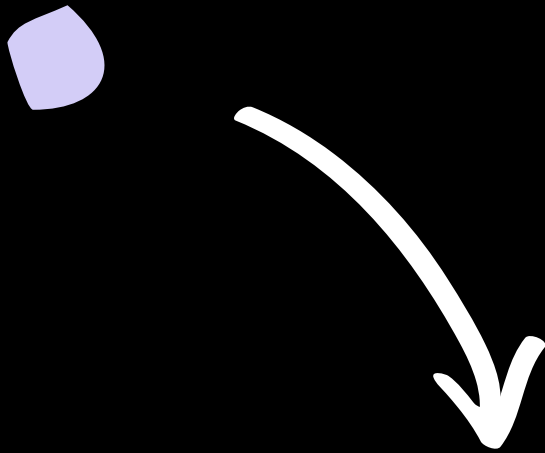
- Net Promoter Score
- Engagement levels
- Turnover rate
- Absenteeism

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## Hosting Virtual & Hybrid Internal Events

When all of your employees are joining an event from behind a computer screen, it can be easy for everyone to disengage quickly. Enabling a chat feature, requiring video to be on, and keeping presentations short are easy ways to support engagement.

But there are not-so-obvious ways to maintain engagement too. Host breakout sessions grouped by common interests (or just provide question prompts so smaller groups can chat). Bring in a guest performer to end your event with a bang. Gamify your internal event based on season or current events (like Halloween costume contests or March Madness brackets for an industry happening).



# Definitions of Event KPIs



# Definitions of Event KPIs

## Brand Awareness KPIs

**Post-event conversions:** After your event, what actions did your attendees take? You can look at metrics like content form fills, demo requests, and email subscriptions.

**Website traffic:** Did your website traffic spike after your event?

**Search volume data:** After your event, did search volume for your company increase? What about search volume for your company name plus the event topic?

**Social traffic:** Are attendees talking about you on social media after your event? Look at metrics like mentions, engagement, and reach.

## Thought Leadership KPIs

**Website traffic:** Did your website traffic spike after your event?

**Social traffic:** An increase in followers could mean people are starting to trust your company or view your internal experts as influencers.

**Post-event conversions:** After your event, what actions did your attendees take? You can look at metrics like content form fills, demo requests, and email subscriptions.

**External website referrals:** Have you seen an increase in external website referrals, also known as backlinks, post-event? These show that others respect your work enough to link to it on their own site.

**Media mentions:** Like social activity, have you been quoted or referenced in any traditional media publications or partner blogs?

## Demand Generation KPIs

**Net-new leads:** How many brand-new people entered your sales funnel because of your event?

**Qualified leads:** How many of those net-new leads are qualified to continue moving down the funnel?

**Cost per lead:** Based on your total event cost, how much are you spending to obtain each new qualified lead?

**Pipeline generated:** How much opportunity (monetarily speaking) is possible with your newly qualified leads?

## Event Revenue KPIs

**Event ROI:** How much revenue did you make from the event itself (total revenue from ticket sales minus total event cost)?

**Conversions:** How many prospects converted to customer status after your event?

**Recurring revenue:** How much revenue did you generate from those who converted? What was your average deal size?



## Retention & Loyalty KPIs

**Net Promoter Score:** After your event, did customer satisfaction increase, decrease, or remain consistent?

**Renewal rate:** What percentage of your customers in attendance renew their business each year?

**Recurring revenue:** How much additional revenue did you generate from account expansions?

**Engagement level & health scores:** How engaged or healthy are your customers who attend events versus those who don't?

**Referrals:** How many referrals have you received from customers who want to attend your events?

## Recruiting Event KPIs

**Candidate experience:** How likely are your attendees to recommend your recruiting events to a peer?

**Conversions:** How many candidates go on to apply for a position with your company?

**Acceptance rate:** What percentage of candidates who apply directly from attending an event go on to receive an offer and accept it?

**Time to hire:** How long does it take for a candidate who attended your event to become a new hire?

## Employee Engagement KPIs

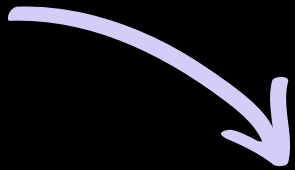
**Net Promoter Score:** After your event, did employee satisfaction increase, decrease, or remain consistent?

**Engagement levels:** How engaged are your employees who attend events versus those who don't?

**Turnover rate:** How long do your employees stick around?

**Absenteeism:** Aside from allotted PTO, how often are your employees calling in?

**splash**

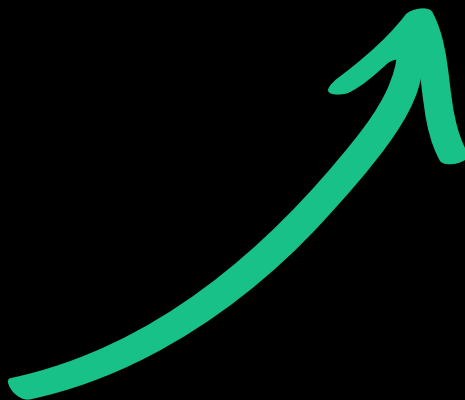


*The Event  
Marketer's*



# CHECKLIST

*for Today's  
Agile Events*



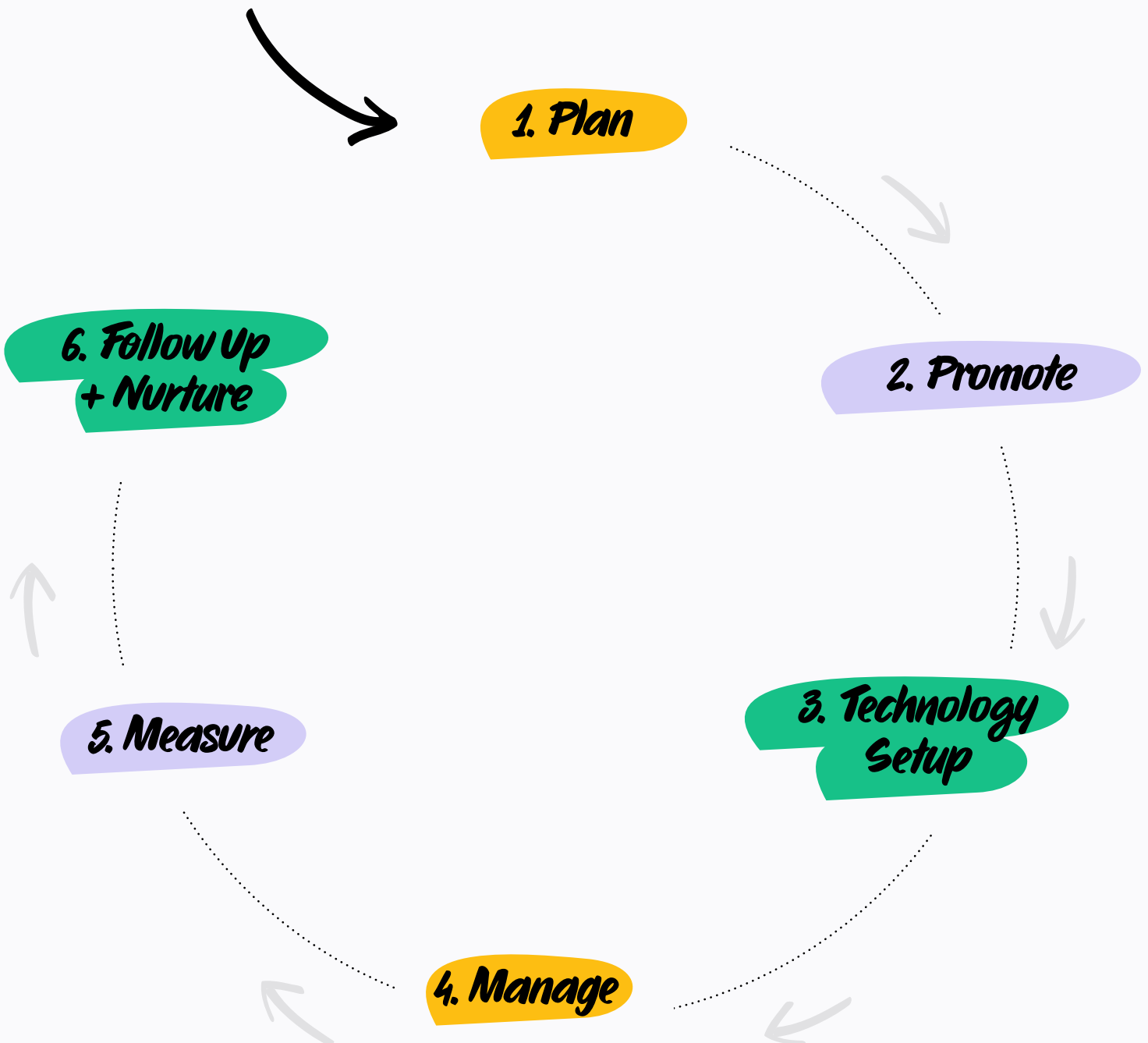
Adaptable. Strategic. Thoughtful. Able to hold a 30,000-foot view of their programs while also rolling with the punches. Event marketers are obviously some of the most agile professionals in the world.

And it's not just about agility. Event marketing can be complicated. There's a reason it's consistently named as one of the most stressful jobs. They need to deliver business results while also giving attendees meaningful, [engaging experiences](#).

That's where this event marketing checklist comes in. It's not meant to be a checklist of every single thing you need to do. But it'll keep you on track with all the high-level, strategic pieces of your event programs.

# The Event Lifecycle

To make this checklist easier to use, we've organized it into six core stages of an event's lifecycle. Within each stage, we've also outlined the strategic components needed to support it.



# Planning Your Event

- Define your event topic and goals
- Determine your budget
- Determine ticketing strategy
- Determine the event setting (virtual, in-person, or hybrid)
- Determine the event format (networking event, panel discussion, workshop, etc.)
- Determine your target audience
- Identify speaker strategy
- Determine sponsorship strategy
- Confirm event date and time
- Assess accessibility requirements
- Document your emergency preparedness protocol




## Pro Tip






Coordinate your target audience lists between sales, marketing, customer success, and any other relevant departments.

Think about location, companies, industries, and personas or titles.





# Promoting Your Event


 Develop pre-event promotions strategy, including:


-  Target audience
-  Event details
-  Key messaging
-  Planned promotion channels
-  Promotion calendar

 Design event branding

 Build your event page, including your registration form and any back-end integrations

 Confirm you're adhering to GDPR and other privacy regulations

 Build and test emails, share cards, and other promotional materials






 Build and test confirmation emails (include URL or access link if it's a virtual event)

## Pro Tip








Create promotional copy for your various target segments, based on title, industry, etc. In addition, segment your follow-up emails based on previous email activity (e.g., if they opened your first email but didn't click through to register, try a new angle or offer).

# Setting Up Your Day-of Event Technology

## On-Site Tech Setup








-  Test electronics, A/V, WiFi, etc.
-  Ensure all staff have downloaded the check-in app
-  Test attendee data capture to ensure information syncs across devices and to your CRM system
-  Set up check-in kiosk, if you're using self-service functionality
-  Set up badge printers and test to ensure they auto-print upon check-in

## Virtual Tech Setup








-  Set up virtual event page and any other broadcasting or audience engagement tools
-  Configure day-of logistics, like virtual check-in, waiting rooms, and audience settings
-  Test back-end functionality, including integrations
-  Validate tech for special moments, like music, video, and screenshare
-  Prepare fallback plans if anyone has technical difficulties
-  Ensure all presenters are comfortable with the technology
-  Confirm chat and Q&A managers

# Managing Your Event

## On-Site Management

-  Get a good night's sleep the night before
-  Arrive early to walk through the event space
-  Connect with your speakers and sponsors
-  Test electronics, A/V, WiFi, etc. one more time
-  Lead and facilitate your event
-  Manage any day-of-event problems that arise
-  Gather event images for post-event promotions

## Virtual Management

-  Get a good night's sleep the night before
-  Connect with your speakers and sponsors
-  Test your virtual broadcasting and engagement tools one more time
-  Lead and facilitate your event
-  Manage the chat and Q&A
-  Manage back-end technical support and troubleshooting
-  Gather event screenshots for post-event promotions



# Measuring the Success of Your Event

- Pull registrant and attendee lists, and segment those lists for both sales and marketing follow-ups
- Sync your lists to your marketing automation and CRM systems, if your event marketing platform doesn't do so automatically
- Build and send event survey to your attendees within 24 hours
- Pull and analyze internally produced event metrics and KPIs
- Compile survey data when available
- Conduct post-mortem with all event teams to discuss:
  - Personal event observations
  - Event KPIs and performance
  - Key learnings and takeaways
  - Attendee feedback








## Pro Tip


Ask your attendees to take a quick survey while on-site. Most people will be more inclined to take this survey while they're at your event, rather than after it, plus they'll remember so much more, meaning you'll get the best feedback.





# Following Up & Nurturing After Your Event


 Develop post-event nurture strategy for customers, segmenting by attendees and no-shows


-  Offer list
-  Key messaging
-  Planned nurture and/or follow-up channels
-  Dates of nurture and/or follow-up





 Create event recording and make it available on your website


 Update your event page to post-event status and update messaging and dates

 Upload photos or multimedia to your event page

 Build, test, and send attendee and no-show emails

 Develop post-event nurture strategy for prospects, segmenting by attendees and no-shows

-  Offer list
-  Key messaging
-  Planned nurture and/or follow-up channels
-  Dates of nurture and/or follow-up



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