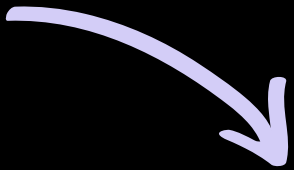splash
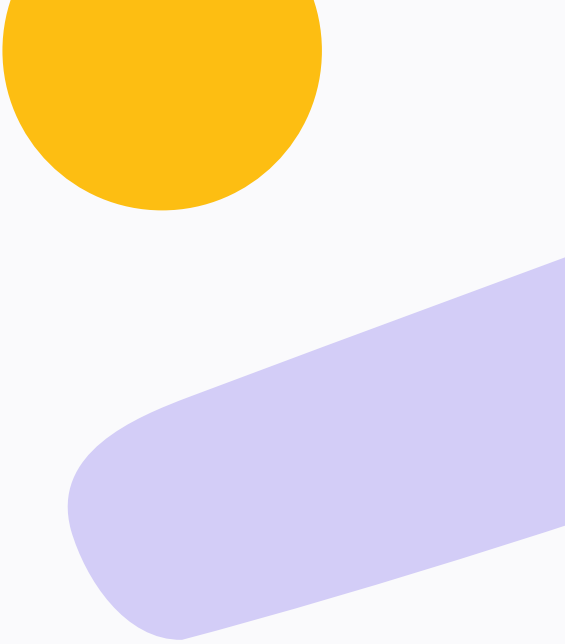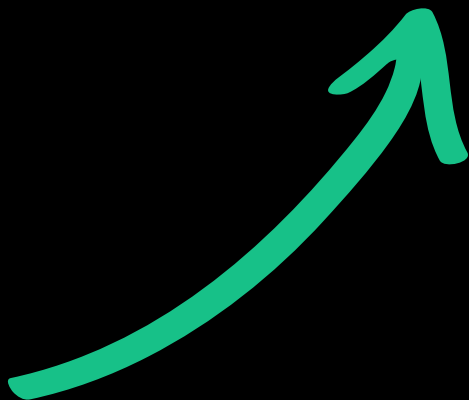
The Event Marketer's

# 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.

1. Plan

2. Promote

3. Technology Setup

4. Manage

5. Measure

6. Follow Up + Nurture
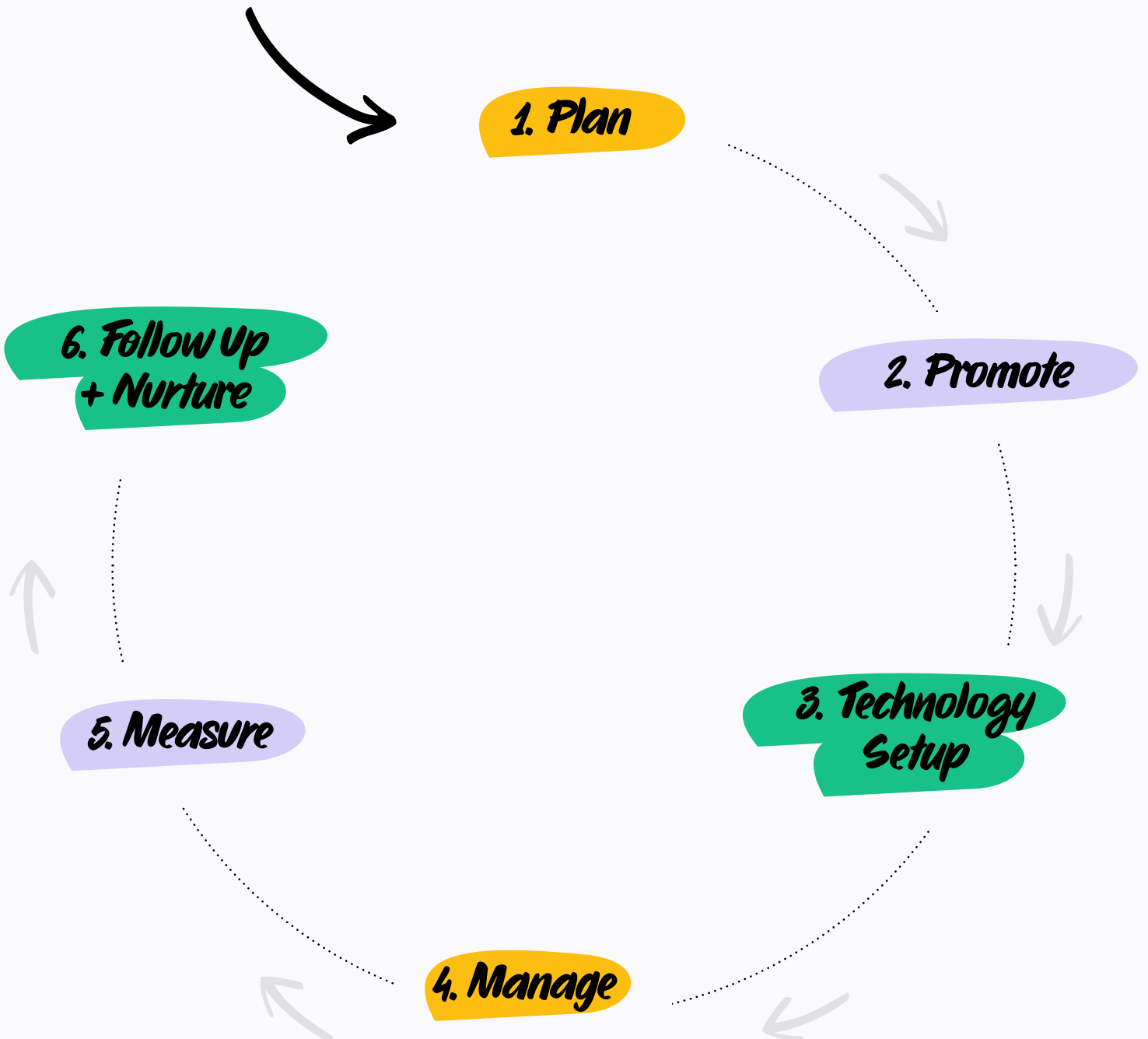
Planning Your Event

- [ ] 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

☐ 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

☐ Create event recording and make it available on your website
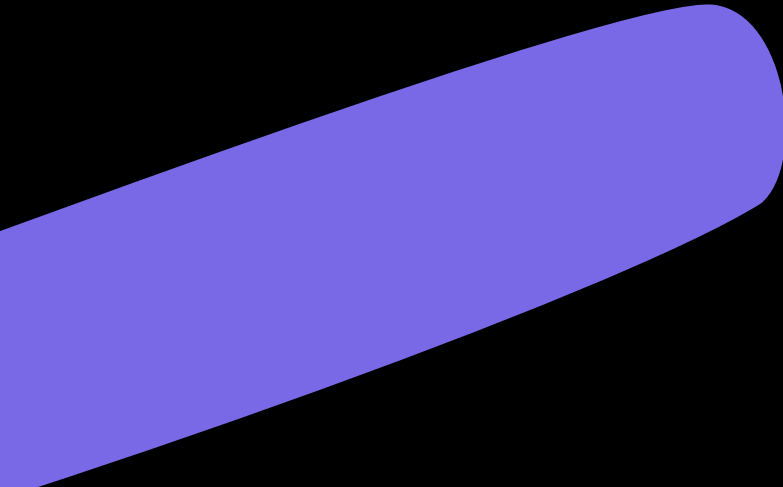
☐ Update your event page to post-event status and update messaging and dates

☐ Upload photos or multimedia to your event page
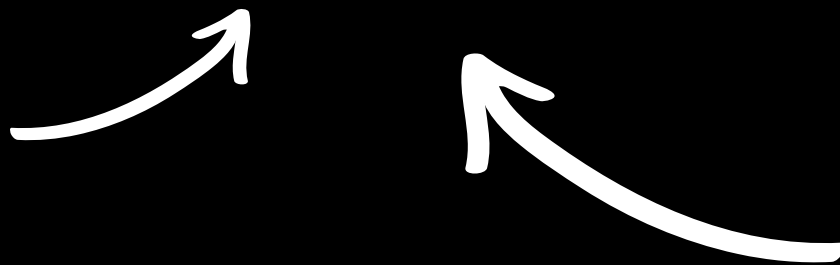
☐ Build, test, and send attendee and no-show emails

Discover an event marketing platform that scales to support your agile event programs, no matter what they look like.

Take the Splash product tour today.

splash