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**The Ultimate Event
Marketing Playbook**

The
**Field
Marketing
Events**

Edition



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 — field marketers, specifically. And, actually, the **ability to adapt no matter what** might as well be the number-one requirement on every field marketing job description.

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

It's not just that field 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, marketing can be complicated — and there's a reason it's consistently named as one of the most stressful jobs. Your field 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 field 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 field event.

Now, it's time to dig in.

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.

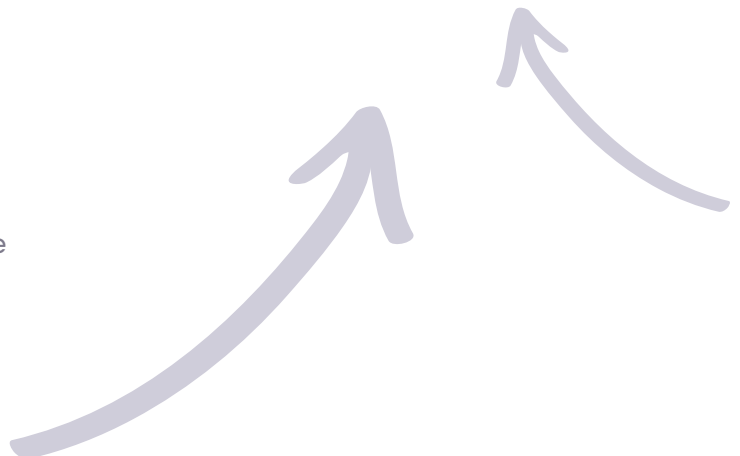
Field events can look like nearly every event type in this playbook. This opens the door for a lot of possibilities — but also for inconsistencies and unpredictability. That's why your field marketing strategy must be set up to allow for variety, but also set the right guidelines to maintain brand guidelines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

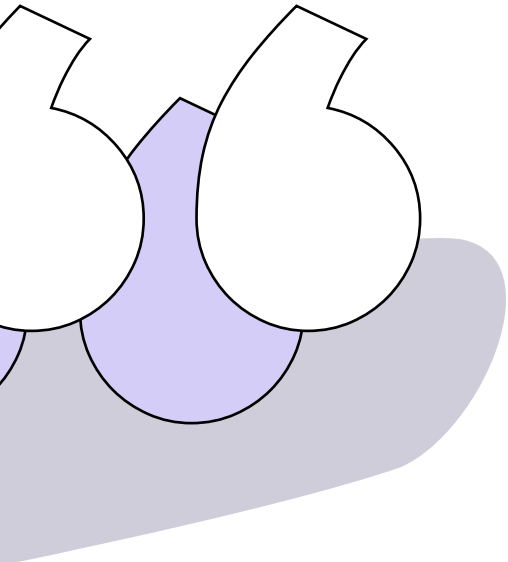
Pro Tip

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

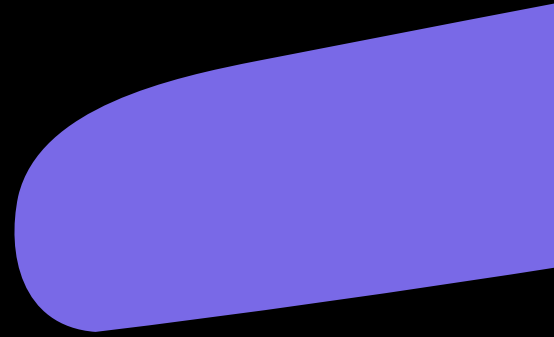
- Net-new leads
- Qualified leads
- Cost per lead
- Pipeline generated

Get definitions for these KPIs on the next page. →

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.



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

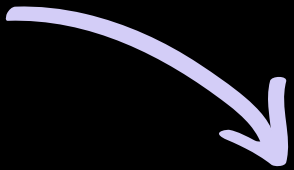
Net Promoter Score: After your event, did employee satisfaction increase, decrease, or remain consistent?

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?

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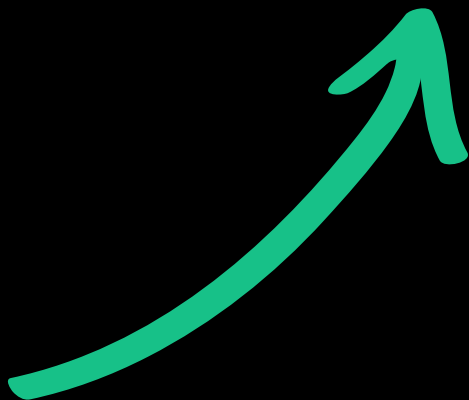


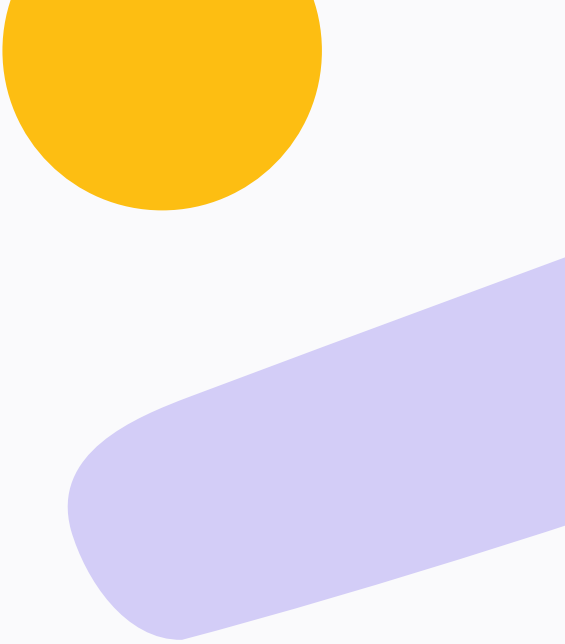
*The Event
Marketer's*



CHECKLIST

*for Today's
Agile Events*





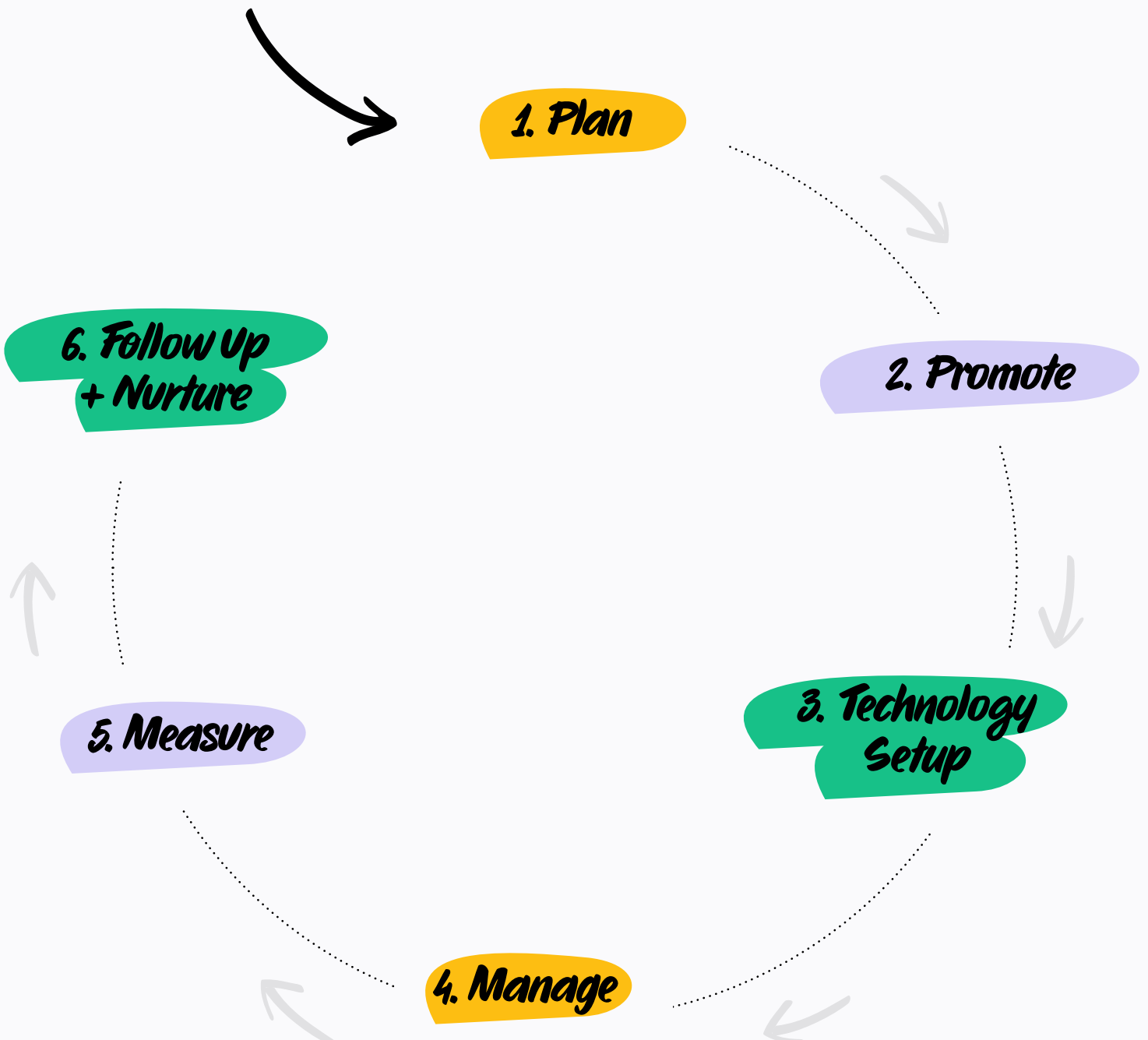
Adaptable. Strategic. Thoughtful. Able to hold a 30,000-foot view of their programs while also rolling with the punches. Event organizers are obviously some of the most agile professionals in the world.

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

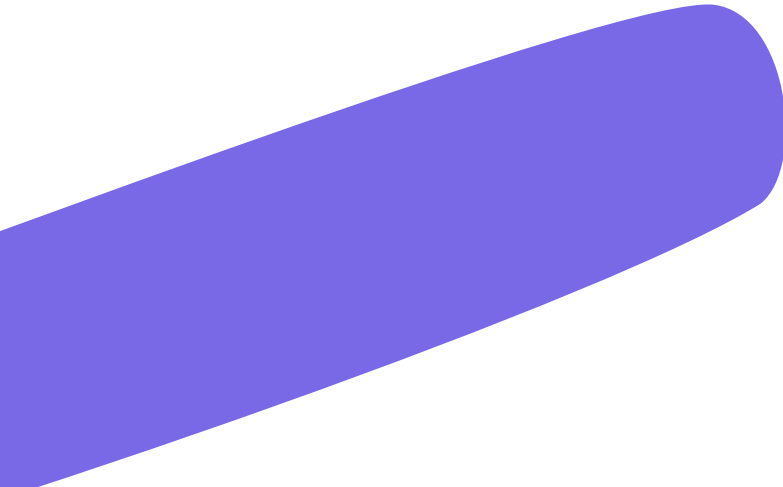
 Update your event page to post-event status and update messaging and dates

 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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scales to support your agile event programs,
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