Follow this simple step-by-step playbook to develop and execute an events marketing plan that meets your marketing objectives.
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EVENT MARKETING PLAN
Framework

Leverage the framework below to quickly empower your organization’s event marketing strategy.

Click the buttons below to access all related training, tools, templates, and other resources.

1. PREPARE
   - Maturity Assessment
   - Strategy Scorecard
   - Event Manager Job Description
   - Event Management RFP Template

2. PLAN
   - Webinar Program Plan
   - Events Database
   - Conference Planning Checklist
   - Marketing Communications Plan

3. PROMOTE
   - Code of Conduct Policy Template
   - Tradeshow Lead Capturing Form
   - Tradeshow Evaluation Checklist

4. EXECUTE
   - Lead Scoring Tool

5. FOLLOW-UP
   - Metrics Dashboard

6. MEASURE
What is CRM?

The activity of designing or developing a themed activity, occasion, display, or exhibit (such as a sporting event, music festival, fair, or concert) to promote a product, cause, or organization.”

– BusinessDictionary.com

Large and small, B2B and B2C, for profit and non-profit organizations all use events in their marketing mix. What is most common is for a company to commit more heavily to a specific type of event – such as tradeshows or webinars – and occasionally host other types as well.

This playbook provides practical guidance for many types of events and will cover tradeshows, webinars, and conferences in the greatest detail.

According to the Center for Exhibition Industry Research (CEIR), there are 14,451 tradeshows held annually in Canada, Mexico, and the United States.

What Constitutes an Event?

Types of marketing events are diverse:

- Tradeshows & Conference Exhibits
- Training & Education Sessions
- Webinars and Virtual Events
- Customer Socials or Receptions
- Ribbon Cuttings (e.g. new office)
- Product Demonstrations
- Press Conferences
- Sponsored Sporting Events
- Focus Groups
- Podcasts
Value of Event Marketing

Events can help accelerate almost any stage of the sales/purchase cycle:

- Need: Press events, Announcements, Open house
- Discovery: Tradeshows, Customer social
- Consideration: Training, Webinars, Product demos
- Decision: Tradeshows, Customer social
- Review:

Event Marketing Spectrum

Every event is an opportunity to help or hurt your brand perception. Regardless of where you fall on this spectrum of commitment to events, this playbook will provide some practical value:

- **High**: Events are a strategic part of your marketing plan, and you want to show ROI
- **Medium**: You use events periodically, and want to get more out of them
- **Low**: You use events infrequently, but you still need to do them well
Determining Your Events Orientation

If events are strategic to your organization, you can justify the proper investment in them:

<table>
<thead>
<tr>
<th>Events as a “Tactic”</th>
<th>Events as a “Strategy”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrequent events, as needed</td>
<td>Frequent events needed to hit revenue targets</td>
</tr>
<tr>
<td>Complementary to mission</td>
<td>Critical to success of mission</td>
</tr>
<tr>
<td>Ad hoc team, minimal resources</td>
<td>Dedicated team and resources</td>
</tr>
<tr>
<td>Viewed as a cost center</td>
<td>Viewed as crucial investment with clear ROI</td>
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Even if events aren’t strategic, you must do them well because they are so public. The potential to impress through an event is high, but so is the potential to embarrass.

Key Success Factors for Events

Here are some of the key success factors when doing Event Marketing:

<table>
<thead>
<tr>
<th>Key Success Factor</th>
<th>Reasoning</th>
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<tbody>
<tr>
<td>Clear objectives for each event</td>
<td>If you are unsure of objectives, how can you show results?</td>
</tr>
<tr>
<td>Meticulous planning</td>
<td>Events can be stressful if they are not carefully planned.</td>
</tr>
<tr>
<td>Flawless execution</td>
<td>You can’t afford to have an event turn into a disaster.</td>
</tr>
<tr>
<td>Solid promotion</td>
<td>You need to know which events provide the most ROI.</td>
</tr>
<tr>
<td>Measurement of results</td>
<td>You need to know which events provide the most ROI.</td>
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This playbook will cover each of these key success factors and provide advice and tools to help.
How to Use this Playbook

This playbook consists of six stages, each with a description of steps and action items. Action items include using our premium tools and templates. Our goal for your use of this playbook is to help you:

**Understand** what events are and where they best fit into the marketing mix

**Plan** events thoroughly and in detail so they meet your objectives

**Execute & Measure** the events plan you develop and improve it based on the results

**Helpful Hint** – If you need assistance implementing your Customer Engagement strategy, contact Demand Metric to schedule a consult with an experienced Analyst; email us at info@demandmetric.com

Major Outputs from this Process:

- **Stage 1 - Prepare**
  - Event Marketing Maturity Assessment, Strategy Scorecard, RFP, Job Description

- **Stage 2 - Plan**
  - Webinar Plan, Tradeshow Plan & Budget, and Conference Planning Resources

- **Stage 3 - Promote**
  - Events Promotion Plan

- **Stage 4 - Execute**
  - Code of Conduct Policy, Tradeshow Lead Capturing Form, Tradeshow Evaluation

- **Stage 5 - Follow-Up**
  - Lead Scoring Analysis

- **Stage 6 - Measure**
  - Event Marketing Dashboard
STAGE 1

Prepare Your Company

In Stage 1, you will focus your efforts around understanding your organization’s strengths and weaknesses as it related to Event Marketing, document your goals and objectives, determine responsibilities for your Event Marketing Manager, and possibly prepare an RFP for Event Services if you plan to outsource.

Key steps in this stage include:

- **STEP 1:** Conduct a Maturity Assessment
- **STEP 2:** Develop an Event Marketing Strategy
- **STEP 3:** Document Event Manager Responsibilities
- **STEP 4:** Contract an Event Management Partner
**STEP 1**

**Conduct a Maturity Assessment**

*Action Item*

Use the Event Marketing Maturity Assessment to identify your organization’s strengths and weaknesses and determine how you can improve your Event Marketing competencies.

Areas of the maturity assessment include:
- Senior Management Commitment
- Alignment with Goals & Objectives
- Knowledge, Trends, & Regulations
- Planning
- Staff, Systems, & Training

**STEP 2**

**Develop an Event Marketing Strategy**

*Action Item*

Use our Event Marketing Strategy Scorecard to provide senior management with a one-page document that clearly outlines your plan of attack.

Key information to include in scorecard:
- Objectives
- Programs & Initiatives
- Metrics & KPIs
- Timeframes and Goals

Read our how-to guide Executing an Event Marketing Plan for more info.
STEP 3

Document Event Manager Responsibilities

Action Item

Use the Event Manager Job Description to outline the key responsibilities and requirements for this new position in your organization, or add these to an existing job description.

What are the main responsibilities for this position?
- Plan and execute events
- Arrange flight, accommodation, food & beverage
- Report on event program metrics
- Recruit keynote speakers and presenters
- Promote events and assign leads to sales

STEP 4

Contract an Event Management Partner

Action Item

Use the Event Management RFP Template to document your requirements for event management and then send this to your shortlist of potential partners to get some proposals.

What goes in a request for proposal (RFP)?
- Company Information
- Statement of Work
- Proposal Submission Procedure
- Score of Work & Requirements
- Estimated Budget
Event Marketing Plan

In Stage 2, you will work with your team to plan for tradeshows, conferences, webinars, or any other events you are planning to attend or host.

Key activities for this Stage include:

**STEP 1:** Build Your Webinar Program
**STEP 2:** Create Your Tradeshow Plan
**STEP 3:** Organize Conferences You Are Hosting
**STEP 1**

**Build Your Webinar Program**

*Action Item*

Use the [Webinar Program Playbook](#) and Tool-Kit of premium tools & templates to help you build our webinar program.

Sections of the Webinar Program Playbook include:
- Objectives & Buy-In
- Pre-Webinar Planning
- Webinar Execution
- Post-Webinar Marketing
- Program Measurement

**STEP 2**

**Create Your Tradeshow Plan**

*Action Item*

Use the [Events Database](#) to collect information on each of the tradeshows and events going on in your industry, select events to attend (use our [Tradeshow Evaluation Matrix](#) to help choose events), and build a budget and events calendar.

Sections of the Events Database include:
- All Events in Industry
- Selected Events
- Events Budget
- Events Calendar
- Event Contacts
## STEP 3

**Organize Conferences You Are Hosting**

**Action Item**

Use the [Conference Planning Checklist](#) to organize activities, assign tasks, and report on status for each activity that needs to be completed to ensure your conference goes smoothly.

Other Conference Management Tools:
- [Conference Budget Template](#)
- [Conference Management Database](#)
- [Conference Agenda Checklist & Timeline](#)
- [Venue Evaluation Matrix](#)
- [Post-Conference Survey](#)
In Stage 3, you will promote your events to ensure you get enough attendees to justify the investment in your webinar and conference programs.

The key activity in this Stage is:

**STEP 1:** Build an Event Promotions Plan
STEP 1
Build an Event Promotions Plan

**Action Item**

Use the [Marketing Communications Plan](#) Playbook and ToolKit of premium tools & templates to help you craft a promotion strategy for your events.

Sections of the Marketing Communications Plan include:
- Strategy & Environment
- Audience
- Objectives
- Messages
- Channels
- Budget & Measurement
To this point, you have developed your Event Marketing strategy and promoted your events. Now, it’s time to execute your plan and attend/host the events.

In this Stage you will:

**STEP 1:** Establish a Code of Conduct Policy
**STEP 2:** Capture Leads at Tradeshows
**STEP 3:** Evaluate Tradeshows to Report Back
STEP 1
Establish a Code of Conduct Policy

**Action Item**
Use the [Code of Conduct Policy Template](#) to establish acceptable behavior for attendees that you are sending to represent your company at industry tradeshows and events.

Why do you need a code of conduct policy?
- To ensure employees behave professionally
- To minimize risk of getting into legal hot water
- To document employee responsibilities
- To maintain a consistent image of your brand

STEP 2
Capture Leads at Tradeshows

**Action Item**
Use the [Tradeshow Lead Capturing Form](#) to facilitate the capturing of important information and contact details of prospects you meet while attending tradeshows.

What goes on the lead capture form?
- Prospect Business Card (stapled to form)
- Collateral Distributed
- Assessment of Budget, Need, Timing, Authority
- Discussion Results
- Next Steps
STEP 3
Evaluate Tradeshows to Report Back

**Action Item**

Use the *Tradeshow Evaluation Checklist* to evaluate tradeshows you attend and report back to your senior management team as to whether you should attend this tradeshow in the future.

What should you evaluate at tradeshows?
- Overall Event Rating
- Pre-Show Evaluation
- Actual Tradeshow Evaluation
- Competitor Presence Evaluation
- Additional Notes
In Stage 5, you will focus on gathering the prospect data you acquired at your events and then scoring these leads based on their sales-readiness.

Your only activity in this Stage is to:

**STEP 1:** Perform a Lead Scoring Analysis
STEP 1
Perform a Lead Scoring Analysis

**Action Item**

Use the [Lead Scoring Tool](#) to evaluate all the prospects or leads you acquired while attending your tradeshows & webinars to get a sense for the quality of leads being generated.

What are the lead scoring criterion?
- Company
- Buying Stage
- Contact Seniority
- Interest
- Actions
- Recentness
Now that you have implemented your mobile marketing programs, you need to track the results of your tradeshows, webinars, conferences, and events.

**In this Stage you will:**

**STEP 1:** Build an Event Marketing Dashboard
STEP 1

Build an Event Marketing Dashboard

Action Item

Use the Event Marketing Metrics Dashboard to track your metrics from your tradeshows, webinars, conferences, and other events.

Following are some key metrics you want to analyze:

- Total Leads by Event
- Cost Per Lead by Event
- Cost Per Lead by Event Type
- Revenue Generated from Event Leads
- Number of Attendees
- Number of Registrations
Conclusion

At the end of any project, it’s always a good idea to review it and identify areas for improvement.

Demand Metric has the tools and expertise to help you build an effective Event Marketing program:
- Create or audit your existing Event Marketing strategy plan
- Assist with using any of the tools referenced in this playbook
- Provide hands-on marketing assistance to accelerate achieving your marketing department’s goals.

To learn more, contact Demand Metric: info@demandmetric.com
About This Playbook

The ANA (Association of National Advertisers) makes a difference for individuals, brands, and the industry by driving growth, advancing the interests of marketers and promoting and protecting the well-being of the marketing community.

Founded in 1910, the ANA provides leadership that advances marketing excellence and shapes the future of the industry. The ANA’s membership includes more than 1,000 companies with 15,000 brands that collectively spend or support more than $400 billion in marketing and advertising annually. The membership is comprised of more than 750 client-side marketers and 300 associate members, which include leading agencies, law firms, suppliers, consultants, and vendors.

Further enriching the ecosystem is the work of the nonprofit ANA Educational Foundation (AEF), which has the mission of enhancing the understanding of advertising and marketing within the academic and marketing communities.
Event Marketing Plan

About This Playbook

Demand Metric is a marketing research and advisory firm serving a membership community of over 106,000 marketing professionals and consultants in 75 countries.

Offering consulting playbooks, advisory services, and 500+ premium marketing tools and templates, Demand Metric resources and expertise help the marketing community plan more efficiently and effectively, answer the difficult questions about their work with authority and conviction, and complete marketing projects more quickly and with greater confidence — thus boosting the respect of the marketing team and making it easier to justify resources the team needs to succeed.

To learn more about Demand Metric, please visit www.demandmetric.com