

# Event Marketing — Workbook

This workbook gives you a hands-on companion to the Event Marketing course. Each section maps directly to a course module and contains exercises to apply the frameworks to your own events, worksheets to capture real data, and checklists to keep execution on track. Complete each section as you finish the corresponding module — the action plan at the end will become your ready-to-run event playbook.

## Event Strategy and Format Selection

Apply the three-tier goal framework and format-goal match matrix to a real or planned event, and complete your event brief.

### Exercise: Write Your SMART Event Objective

Choose one upcoming event (real or hypothetical) and draft a SMART objective using the structure: 'At [event name] ([date]), collect [number] qualified leads from [ICP description] and convert [number] into [next step] within [timeframe].'

- What is the primary goal tier for your event — awareness, engagement, or pipeline? Why?  
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- What does your ICP look like for this event (job title, company size, industry, buying stage)?  
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- What specific number of qualified leads would make this event a success — and how did you arrive at that number?  
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- What is the follow-up next step you want every hot lead to take within 30 days of the event?  
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### Worksheet: Format-Goal Match Matrix

For three event formats you are considering (e.g., trade show booth, executive dinner, hosted conference), rate each against your goals and constraints on a 1–5 scale. Use the final column to select your recommended format.

Event format option 1

Alignment with primary goal (1–5)

ICP presence at this format (1–5)

Budget fit (1–5)

Estimated cost range

Event format option 2

Alignment with primary goal (1–5)

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ICP presence at this format (1–5)

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Budget fit (1–5)

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Estimated cost range

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Event format option 3

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Alignment with primary goal (1–5)

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ICP presence at this format (1–5)

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Budget fit (1–5)

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Estimated cost range

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Recommended format and rationale

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### Checklist: Event Brief Completion Checklist

- Event name, date, location, and format documented
- Primary goal with numeric target written and approved by stakeholders
- ICP definition includes job title, company size, industry, and buying stage
- Total budget set with line-item breakdown (space, build, staffing, promotion, swag, tech)
- RACI completed with named owners for each work-stream
- Key dates calendar built (registration open, promotion launch, email sequences, day-of runsheet)
- Success metrics and measurement plan documented
- Brief distributed to and signed off by marketing, sales, and executive sponsor

## Pre-Event Promotion and Audience Acquisition

Build your 90-day promotion calendar, draft your email sequence, and assemble your partner co-promotion list.

### Exercise: Map Your 90-Day Promotion Calendar

Using the three-phase framework (Announcement / Build / Urgency), assign specific tasks to each phase for your event. Focus on the channels where your ICP is most active.

- What is your registration goal, and at what registration velocity (percentage of goal) should you trigger a mid-course correction?

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- Which three channels will carry the most weight in your promotion plan — and why?

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- What early-bird pricing or incentive will you use in Phase 1, and what is the deadline for that offer?

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- Who are three partner organizations or speakers you could activate for co-promotion, and what would you offer them in exchange?

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## Worksheet: Email Sequence Planner

Map out your five pre-event emails. For each, record the send day, subject line, primary CTA, and the audience segment it targets.

Email 1 — name (e.g., Save the Date)

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Email 1 — send day (relative to event date)

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Email 1 — subject line draft

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Email 1 — primary CTA

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Email 1 — audience segment

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Email 2 — name

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Email 2 — send day

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Email 2 — subject line draft

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Email 2 — primary CTA

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Email 2 — audience segment

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Email 3 — name

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Email 3 — send day

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Email 3 — subject line draft

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Email 3 — primary CTA

---

Email 3 — audience segment

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Email 4 — name

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Email 4 — send day

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Email 4 — subject line draft

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Email 4 — primary CTA

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Email 4 — audience segment

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Email 5 — name (Day-Before Logistics)

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Email 5 — send day

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Email 5 — key logistics to include

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### Checklist: Partner and Speaker Activation Checklist

- Identified minimum 5 co-promotion partners (sponsors, media, associations, speakers)
- Negotiated email blast dates and social post commitments with each partner
- Speaker toolkit created: 3 pre-written LinkedIn posts (short/medium/long), email template, 3+ graphic assets
- UTM-tagged links generated for each speaker and partner
- Unique discount codes created for speaker audiences if applicable
- Follow-up schedule set: reminder to speakers at Day 14 and Day 7 before event
- Registration page conversion rate tested (target: 20%+ before running paid media)

## On-Site Execution and Lead Capture

Design your booth layout, prepare your staff qualification framework, and configure your lead capture technology before the show opens.

### Exercise: Booth Design Audit

Sketch or describe your booth layout and run it through the 3-second rule audit. For each visual layer (30-foot, 10-foot, 5-foot, arm's-reach), write the exact message or experience your attendee encounters.

- What is the 5-word value proposition on your header graphic — can someone read it walking past at 30 feet?

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- What is the one interactive element (demo, activity, visualization) that will draw attendees into the booth from 10 feet away?

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- Is there a table barrier at the front of your booth? If yes, how will you remove or reposition it?

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- What is the one question on your signage designed to stop a qualified ICP in their tracks?

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### Worksheet: Lead Qualification Scoring Sheet

Define your lead tiers before the event so all staff classify leads consistently. Fill in the criteria that define Hot, Warm, and Cold leads for this specific event.

Hot lead — job title criteria

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Hot lead — company size criteria

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Hot lead — buying timeline criteria

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Hot lead — pain point or trigger criteria

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Hot lead — next step (e.g., demo booked)

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Warm lead — job title criteria

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Warm lead — company size criteria

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Warm lead — buying timeline criteria

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Warm lead — next step (e.g., follow-up call agreed)

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Cold lead — definition

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Cold lead — next step (e.g., enroll in nurture sequence)

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Lead capture tool being used

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CRM sync test completed (Yes / No)

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Day-1 automated email configured for hot leads (Yes / No)

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### Checklist: Day-Before Show Readiness Checklist

- Booth build confirmed complete and matches approved design
- All staff briefed on BANT-lite qualification framework with role-play completed
- Lead capture tool loaded on all devices with CRM sync tested
- Custom qualification form fields configured and mapped to CRM properties
- Hot-lead automated Day-1 email configured and tested
- Printed collateral (brochures, business cards, one-pagers) confirmed on-site
- Swag and giveaway items counted and confirmed
- Show-day shift schedule distributed to all staff
- Escalation path defined: who does staff call if a hot lead needs an executive conversation?
- Backup internet (mobile hotspot) available in case show floor WiFi fails

## Post-Event Follow-Up and ROI Measurement

Execute your tiered follow-up sequences, calculate event ROI, and document your event playbook for future iterations.

### Exercise: Design Your Tiered Follow-Up Sequences

Write the Day-1 email for each of your three lead tiers. Focus on personalisation signals — reference the event, the conversation, or a specific resource relevant to their stated pain point.

- For your Hot lead Day-1 email: what specific detail from the conversation will you reference, and what is the single CTA (e.g., confirm the booked demo time)?
- For your Warm lead Day-1 email: what resource (case study, ROI calculator, webinar recording) is most

relevant to the pain point they expressed at the booth?

- What meeting scheduling tool will you embed in Warm lead follow-ups, and who owns the calendar?
- At what point in the nurture sequence will you hand a Warm lead to a sales rep vs. continuing in marketing automation?

### Worksheet: Event ROI Calculator

Fill in all cost and results fields for your event. Leave the calculated cells blank — they are formulas you will complete in the companion Excel template.

Event name and date

Space / sponsorship fee (\$)

Booth build and graphics (\$)

Staffing and travel (\$)

Pre/post-event marketing spend (\$)

Swag and giveaways (\$)

Technology (lead capture, apps) (\$)

Other costs (\$)

Total event spend (\$) — leave blank, calculated

Total leads captured (raw count)

Qualified leads captured (matched ICP)

Cost per qualified lead (\$) — leave blank, calculated

Hot leads (meeting booked)

Warm leads (follow-up agreed)

Discovery calls booked within 30 days

Pipeline opportunities created (\$)

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Pipeline-to-spend ratio — leave blank, calculated

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Deals closed attributed to event (\$)

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Event ROI (%) — leave blank, calculated

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### Checklist: Post-Event Retrospective and Playbook Checklist

- 48-hour debrief meeting scheduled within 24 hours of event close
- Lead counts by tier reviewed against pre-event targets
- Day-1 follow-up emails confirmed sent to all hot and warm leads
- Staff feedback collected on booth traffic flow and qualifying conversations
- One thing to eliminate and one thing to invest more in documented
- Event playbook updated with results archive entry (leads, pipeline, cost-per-lead, ROI)
- Vendor contacts and contracts saved to playbook for next iteration
- Graphic templates and email sequences archived in playbook assets library
- Next event planning kick-off date blocked on calendar (90 days before next show)
- Playbook shared with all stakeholders and stored in agreed team location

### Your Action Plan

1. Write your SMART event objective using the format from Module 1, Lesson 1 — tie it to a qualified lead number and a follow-up conversion rate
2. Complete the format-goal match matrix for your next event and select one format to move forward with
3. Draft your event brief and get written sign-off from marketing, sales, and your executive sponsor before signing any vendor contracts
4. Build your 90-day promotion calendar in a project management tool with named owners and due dates for every task
5. Write your five pre-event email sequences and schedule them in your marketing automation platform at least 90 days before the event
6. Identify five co-promotion partners and deliver a speaker toolkit to every confirmed speaker at least 60 days before the event
7. Design or review your booth layout against the 3-second rule — confirm header messaging, engagement hook, and open front
8. Run a 30-minute staff qualification role-play session 48 hours before the event and define Hot/Warm/Cold criteria in writing
9. Configure and test your lead capture tool with CRM sync at least 72 hours before the show opens
10. Execute all Day-1 follow-up emails within 24 hours of the show closing, then run your 48-hour retrospective and update the event playbook













