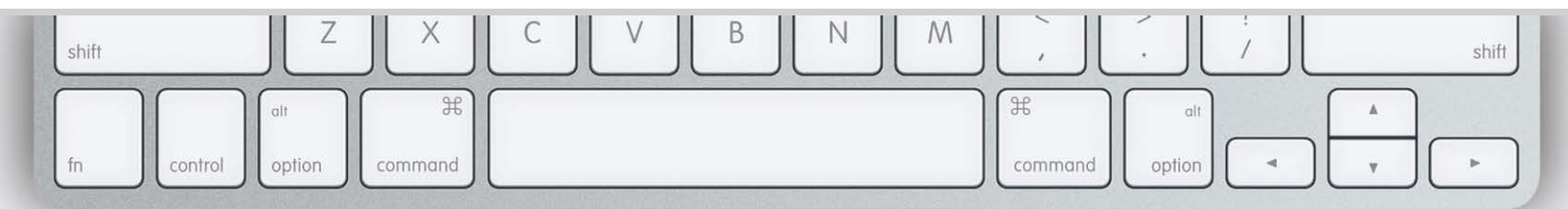


The Professional Event Planning Guide →



Your step-by-step guide for planning a complex event like a conference, trade show, convention or association meeting.



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OUR INCREDIBLE TEAM OF EVENT PROS



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CON TENTS



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everything you need:

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scheduling, marketing, executing and following
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THE MOST HIGHLY-RATED EVENT APP, WITH AWARD-WINNING SUPPORT.

We're here to help

01 PART ONE

Planning Your Event



BUILD THE TEAM

Get ready to build an event team that is organized and communicates well!

If your event is small, you may personally be handling most or all of the tasks discussed in this chapter. For big events, you probably have committees reporting to a project manager. However you structure the responsibilities, make sure there is a hierarchy to ensure accountability. All committee members should in some way report up to the project manager.



The Ultimate Event Team



Project Manager

Oversees all departments and is ultimately responsible for the execution of the event. Manages the budget. Drives strategy. Makes top-level purchasing decisions. Can't live without her note-taking app.



Communications

This team makes sure a guest has everything he needs to get the most out of the event, from maps, schedules, speaker info, and how to network. They build out and update the mobile event app. They always know what to say, you know?



Scheduling

This team is in charge of setting the agenda, working with speakers, and making sure the schedule is up-to-date and communicated to the right parties. Your scheduling guy coordinates meetings at the event, and he *lives* to make attendees into successful networkers.



Marketing

These guys make the right people aware of the event, create offers and timing strategy to boost registration, oversee branding, communicate with registrants, coordinate social media amplification and media relations, and send and measure follow-up materials. Oh, and they're just nuts for measurable performance.



Creative design

Creative designers put together all visual design for printed and web materials like schedules, collateral, registration and signage, and anything needed for the mobile event app. To break it down: they make you look good.



Registration

These heroes own the development of the registration setup, work with a software provider, produce and manage badges, generate reports, and make sure the registration process (pre-event and during the event) is infallible and smooth. And when they really rock... *they make it look easy.*



Sponsorships

These guys work to map out booth spaces, sell sponsorship opportunities, maintain relationships with sponsors, and explore community organization relationships. They have killer timing and great people skills.



Promotions

This team handles contests, raffles, auctions, offers, giveaways and games. They're creative, energetic and not afraid to have fun. You might find them loading a t-shirt cannon or handing out prizes for the scavenger hunt.



Venue/show floor

This team is the main contact for the venue, the vendors, the sponsors while on-site, and the on-site volunteers and staff: security, photography and food/beverage. They remember everyone's name, and they know where all the outlets are.

Keeping everyone organized?

Is your team in place? You're ready to create an event project plan. A project plan is more than just a to-do list. It's a detailed breakdown of every single action item that identifies owners, dependencies, due dates and completion status. You should be able to justify every action item by mapping it to your top-level event goals.



We live in **Basecamp**. It keeps everyone accountable and organized.

Mark Knowles, Bend WebCAM

And what if you're working with volunteers? Mark Knowles is the Co-Chairman of **Bend WebCAM** (the "CAM" stands for Web, Creative and Marketing). It's a boutique digital marketing conference with a reputation for their attendee experience, world-class speakers and attention to detail. They execute a lot with their three-person core team... plus an army of volunteers.

"Our volunteers are fantastic," says Mark, "but the truth is, the work dynamic of a group of volunteers is a little different." A volunteer who isn't pulling his or her weight can be an issue. Mark says he's found that volunteers who want to help because they truly believe in the conference's message tend to perform better than those who just want a free ticket. "We expect a lot from each one." Bend WebCAM rewards its volunteers with nice thank-yous in addition to entry.

Your project plan can be as simple as a spreadsheet:

	A	B	C	D	E	F
1	Task	Owner	Dependencies	Larger goal	Due	Status
2	Cut video for Save-the-Date teaser	Anna	Alex for sound	Increase registration	9/5	Done
3	Send Save-the-Date email to house list	Anna	None	Increase registration	9/10	
4	Schedule tweets and FB posts for Save-the-Date	Anna	None	Increase registration	9/10	

The project plan keeps everyone moving. It identifies elements that are taking too long or are holding up other deliverables. Don't be afraid to reassign ownership of a task—sometimes a new perspective can be all it takes to be able to move on.

When your event is over, the project plan can also be a valuable relic: you'll be able to see what went smoothly and what didn't, and use it as a template—to be refined based on your learnings—for next time around.

Tools for organizing a team

Google Docs is a simple, effective, free tool for your project plans and fundamental event details. Google Docs allows you to create tabbed spreadsheets that can be edited in real-time by multiple users, and can include features like notes, chat, and version control.

Basecamp, a project management tool, can be synced to mobile devices and is designed to keep large groups of contributors on track.





SELECT THE DATE AND VENUE

Choosing a date for your event is a tricky process. You'll need to do some research to find a good time in the event marketplace—a time when there will be venue availability. You'll also have to consider dates for your location based on seasonal factors like travel impediments and costs.

“In January it’s very challenging to find large spaces,” says Romy from PRIME, a full-service events agency in Vancouver. Romy is an eleven-year veteran of the events industry. “January and February are heavy on sales conferences, and it happens again in September and October.” She says that during these times it’s tricky to find traditional locations with show floor space.

Romy also suggests sending a pre-conference survey to suss out attendees’ openness to traveling for the event. “Given the key agenda, does it warrant being in a destination where you don’t have to worry about flights?”

Booking events on the East Coast during the winter months can cause travel problems if attendees have to fly or drive to get there.



Look for places that have the flexibility to grow if your event grows. “Don’t pick a property where you are maxing out your meeting space,” Romy says.

As you talk to the representatives of various venues, ask as many questions as possible to make sure you’re getting the complete story. Look for budget, thematic fit, location (is it central, easy for transport?), facilities, on-site staff. Are there restrooms conveniently located throughout the venue? What’s the situation with fire control and emergency response?

Check out the venue question checklist on the next page for more ideas.



Checklist: Questions to ask about every venue

When was the venue last remodeled? _____

How comprehensive is the on-site staff? _____

What types of events have been held here before? (References are required!)

What types of challenges have there been, and how did event management handle them? _____

What are the IT capabilities—internet connection, in-house technicians, speaker equipment? _____

If there's an emergency, how will the venue staff get responders there quickly? How long will it take? _____

A MEMORABLE VENUE

The right setting can actually generate a positive emotional response—and a memorable experience. Bend, Oregon, a city of 80,000 people with a walkable downtown, has become a focal point of the WebCAM conference. Bend is known for its craft beer, and the beer makes an appearance at every social gathering related to the event.

“Bend has a cool flavor,” says Mark Knowles, Co-Chair of WebCAM. “We want attendees to leave feeling like they got to know the city.” Rather than holding all the sessions in the hotel, attendees walk a few blocks to the Tower Theatre. Lunch is sponsored by a few local downtown restaurants.

If you want to get your attendees out and about, choose an area that’s walkable, and give guests time for lunch and transitions so they don’t feel rushed. (WebCAM switched to a 90 minute lunch break to give guests time to explore the downtown.) Prepare your attendees for weather conditions in your final pre-event email, and include points of interest on the map in your mobile event app.

Budgeting the Venue

The venue is often the most expensive single element of an event. Consider these tips for keeping costs down:

- An out-of-the-box venue package, like one offered by a hotel, may be able to handle location, food, security, accommodation and transportation, and can coordinate third-party vendors like A/V and furniture. Working with a single entity gives you negotiating power.
- On the other hand, you may also be able to save money and provide an interesting local experience by working with nearby restaurants for some of your meals. If a few local lunch places are easily walkable, arrange a deal with them where you will distribute vouchers (good for 1 meal from a prix-fixe menu or for a certain amount toward a meal) for attendees to use during the scheduled lunch break.
- Some venues may give a discount if you pay on-site.
- Work with a hotel’s existing inventory for furniture, linens and table decor.
- Order some food “by consumption”, meaning that you will only pay if they are consumed. This will work for packaged items like snacks and soda.
- Be creative! Almost anything can be sponsored.



PLAN THE BUDGET

Your new motto: let there be no surprises! (There will probably be a few, but it's not a bad goal.)

You will be more successful if you plan your entire budget in advance, work in several stages, and stay very close to the process.

Begin by listing everything you will need, ideally, for your event. Comb your project plan to trigger any forgotten items. You can start with our example here, designed for a hotel-based conference, and add or subtract costs based on your event's needs.

Check out the budget worksheet in the next two pages!

Budget planning tools:

Planning Pod mobile/desktop app for in-your-pocket general event organization, including budget planning.

Marriott Budget Calculator web app for quick ballparks on total budget and cost per attendee.



Workbook: Plan your event budget

01

All Staff

Compensation and gratuities _____

Travel _____

Accommodations _____

Food _____

Facility

Venue rental _____

Furniture, serving items, decor _____

Food/drinks _____

A/V equipment and labor _____

Security _____

Technology (wifi, IT support) _____

Badge scanning _____

Logistics

Event insurance _____

Contracts _____

Permits _____

Marketing

Marketing tools _____

- Email marketing _____

- Survey tool _____

Printing _____

Shipping _____

Video production _____

Photography _____

Web development _____

Media relations _____

Swag/merchandise/giveaways _____

Workbook: Plan your event budget

Communications

Mobile app _____

Printing _____

Signs _____

Maps _____

Flyers _____

Schedule _____

Registration

Software _____

Badge printing _____

Signage _____

Speakers

Compensation _____

Travel _____

Acommodations _____

Food _____

Thank-you gifts _____

Workshop materials _____

Sponsors

Thank-you gifts _____

Activities-Entertainment

Music/DJ _____

Gaming rentals _____

Auctioneer _____

Offsite venue _____

Attendee Services

Airport shuttle _____

Charging stations _____

Storage _____



NAIL DOWN THE SCHEDULE

Set your agenda as early as possible! Is there a keynote speaker? Will there be an extra day or evening planned just for your sponsors? Will there be a single “track” of workshops and talks, or will attendees have the choice to choose between more than one session at a given time?

But don't fret: it's not crucial to have the schedule completely figured out before you start telling the world. You can make changes to the schedule after you have begun to market your event and registration begins to grow. Technology makes this easy. You should be able to update your website and the schedule on your mobile app, simultaneously, with the click of a button.

But it's best if you have the basic framework confirmed as early as possible. For one thing, the schedule is an important selling point!



Get an amazing speaker the first time around.”

Romy Yan - PRIME

With a first-time event, people are sensitive to cues about the event's quality and tone.



A WORD ABOUT THE KEYNOTE

A great keynote can set a strong precedent for how the time at the event should be used. It's one of the best methods at your disposal for guiding the conversation and getting the community to network.

Vet your speakers. Watch videos of their previous appearances to make sure they're engaging. You don't want to be disappointed when the renowned author of a relevant work ends up being well-versed... but sadly unable to captivate the audience.

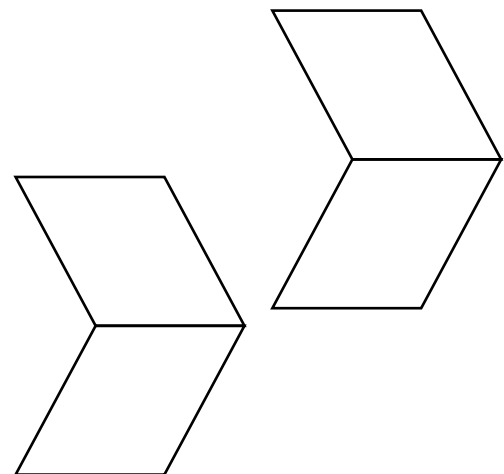
To land a really good speaker, you'll need to impress upon her that this is the right event for her.

- What are the different ways you can compensate your keynote speaker? It can be as simple as payment... but a per diem or a nice hotel might go a long way, too.
- Get her attention by providing a compelling snapshot of your audience. Remember, speakers are public figures who want to be able to talk to the public, and they are working on growing an audience of their own.
- Tell a prospective speaker why you want **her specifically**, make her feel welcome, and be clear upfront about compensation and expectations.

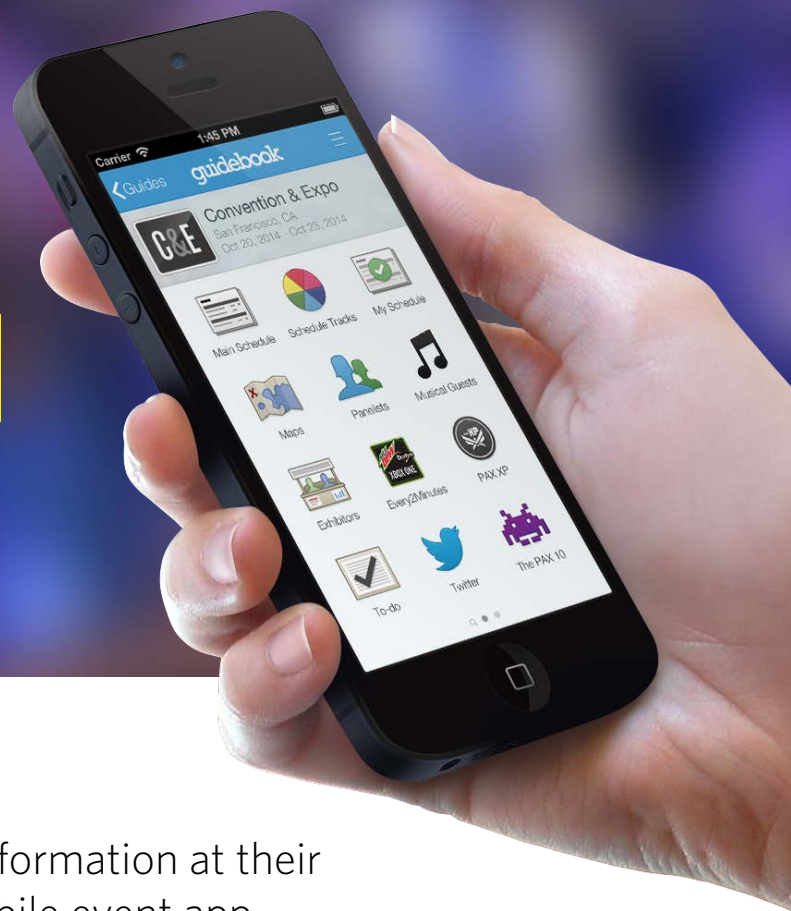
The Bend WebCAM team consistently brings world-class speakers to the little town of Bend, Oregon—not an easy challenge. Mark Knowles has connections in the industry that come from a dedicated effort to contribute to the digital marketing community, traveling frequently to industry events and getting to know speakers. “When I ask people to come to our conference, it’s our chance to ask for something back from the community,” says Mark.

As you build the agenda, keep a dialogue going with your audience. “The last thing you want is to throw a conference and find that there’s no interest in the topic,” says Romy from PRIME.

You can use your pre-event survey to get prospective attendees to vote on topics, speakers, workshops and more. It will help your eventual agenda be more relevant to your audience—and it’ll remind your attendees that they’re being heard.



BUILD A MOBILE APP



Your attendees need all the event information at their fingertips. The best solution is a mobile event app.

No matter your event size, complexity or budget, there is an app option that's easy to build and manage. You'll save money on printing, reduce paper waste, and maintain an accurate agenda (last minute changes are a snap!). You can even generate revenue from clickable in-app sponsor ads.

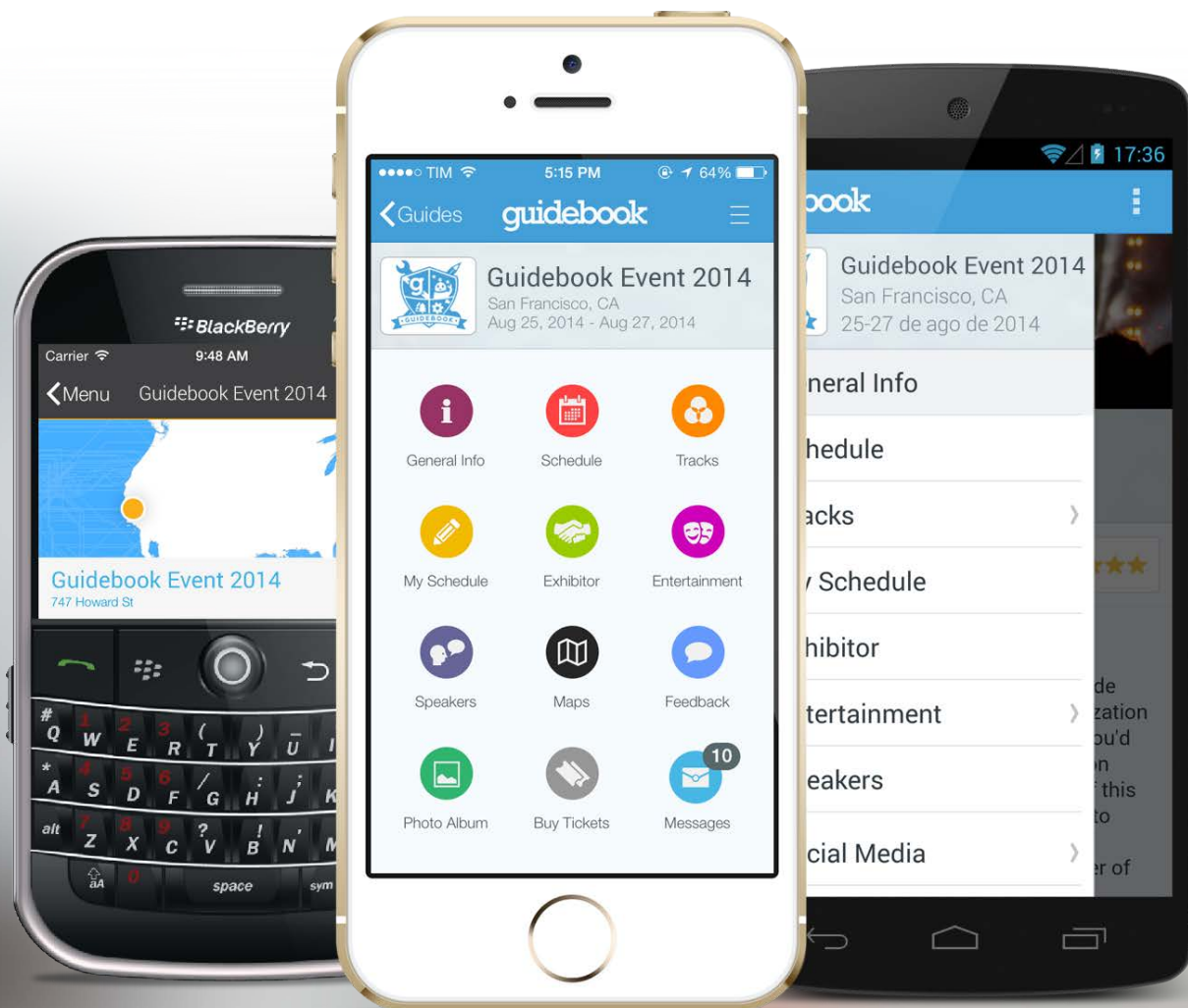
A mobile app for your event will be easy for your attendees to view on their mobile phones, tablets and computers. They'll be able to use the app even in locations without wireless internet or a cellular signal—perfect for a busy hotel or exhibit hall.

A hands-on agenda increases engagement.

A good mobile event guide will offer a seamlessly designed web-based version as well. This means your attendees can check the guide from their laptops ahead of time, view the agenda and make personal to-do lists. Whether they're on a mobile phone, a tablet or the web, they can click to learn more about speakers, download PDFs, complete surveys and more.

Maps and floor plans are fully customizable.

Interactive maps allow attendees to zoom and click, and you can link to session info, written directions or sponsor information.



Sponsorships: creative in-app packages generate revenue.

Sponsors love to buy display ad space in your mobile app because it's measurable and actionable: users can click to a sponsor landing page.

Push messaging makes communication a snap.

Send real-time alerts about location changes, promotions or contest winners. Remember the days of running through the halls with handwritten posters to notify a room reassignment? Now you can share that information instantly.

Gamification: proven to increase engagement and message sharing.

Help your attendees move throughout the venue with a custom game, like a scavenger hunt, that is built into the app and incorporates real-life elements.

Social media you can measure and control.

Include an icon in the home screen so your attendees can use Twitter, Facebook, LinkedIn and more—right from within your mobile event guide. You can also create a button that links to a curated feed of a video or photo site like Vimeo, Vine or Instagram, and shows only photos and videos from your event.

Attendee networking: goodbye, business cards!

Allow your attendees to add contact cards to their app, which they can then “exchange” with people they meet. Your attendees can create a few different kinds of cards with varying levels of information appropriate for new business contacts, social settings and more.

Personal to-do lists help keep guests accountable to their plans.

Encourage your attendees to choose the sessions and networking events they don't want to miss, then check them off when they've completed them.

Real-time session or event feedback is more accurate.

Ask your attendees what they liked most about the event, or how they would improve it for next year.

Save thousands in printing costs.

Go green! No more typesetting, printing or shipping.

Supplementing with printed materials is OK. Event organizers in some industries switch to mobile gradually, printing a much smaller quantity of paper maps and schedules.

Real story: Tracy's event app

In 2014, Tracy Robey managed the Renaissance Society of America's annual meeting, a 2900-person conference with an 850-page program. The RSA was trying out a mobile app in addition to the printed book.

"After the first day, attendees were walking up to the registration table with their two-and-a-half-pound printed program, asking, "Can I give this back to you? I have the app now."

In addition to lightening the load, when the conference goes mostly mobile in 2015, Tracy will save around \$20,000. Plus, the printed guides weren't as accurate as the RSA mobile event app. "We made hundreds of changes to the program in the months before the conference, while the book was being typeset. By the time we were handing it out, it just wasn't accurate."

To encourage members to adopt the mobile app, Tracy slowly introduced the concept through email communications leading up to the event. The last email before the conference began included the QR code and web link to download the app.

"Most people had already downloaded the app and used it. They had their schedules and to-do lists already made."

Tracy came up with a clever method for catching the stragglers. She inserted bookmarks that showed the easy QR code app download instructions into the huge printed programs. Good timing when so many attendees desperately wanted to stop lugging around the heavy book!

MAKE REGISTRATION SEAMLESS



Your goal: a smooth, accurate, painless registration process.

Event registration is notorious for going awry sometimes. This is simply because there are so many moving parts. You can combat this by testing the system many times and taking it step-by-step. We're here to help!

Choose a registration and ticketing tool that is designed for your needs. A pre-configured solution like **Eventbrite** or **ShowClix** can work very well for most needs, and larger events may choose a tool with more custom development.

Either way, the registration page *must* be user-friendly and accessible on any device. You need it to be just as easy for someone to sign up on their mobile phone or tablet as on a laptop or desktop computer.

We'll help you make sure the registration form is clear, collects the information you need (but not more), and is smoothly integrated into your website or landing page.

You can use traditional web form and landing page best practices to drive your registration form strategy:

- Only ask for what you need. If your form is long and requires a lot of personal information, fewer people will complete it (either because they don't wish to give that information or because there are more opportunities for the form to fail). It's common to see forms that ask for a full home address, but unless you *really require it*, don't make it a required field on your form. More questions only add a barrier to registration.
- You should keep your registration form as short as possible, but *do* include questions that will give you ideas about how to improve your event. For example, asking registrants how they heard about the conference can help you prioritize your marketing efforts next time.
- Optimize your confirmation email. A standard confirmation will simply tell someone that, yes, they have successfully registered. But the confirmation is a great opportunity to prompt new fans to share their exciting news on Twitter or LinkedIn. You can also try a referral offer on the confirmation page: for example, if a registrant gets another person to sign up, they'll get a free upgrade, some cool merchandise, or an extra entry into the raffle.
- Test the entire process over and over again. If your system has a bug that prevents people from registering, you're actively losing registrants and alienating people. Regularly test your registration system all the way through with different web browsers and devices.

Once a person has registered, how will you communicate with them? “Walk yourself through the process,” says Romy from PRIME. “You’ve effectively marketed to someone until they have agreed to sign up, now you need to make sure you don’t go silent on them.”

Without bombarding your registrants with emails (a good rule is 1-2/week or fewer until the week preceding the event, when you can get away with sending a few more), keep them updated and remind them what they signed up for.

According to Romy, “The classic formula is to send an event reminder, then a teaser, then some exciting new updates, and finally the travel info.”

Alternate registration methods:

Will you accept registrations over the phone, in person, or by fax? Make sure all data goes directly into the web application, without a wait time. If you’re collecting registrations over the phone, enter information in real-time and ask them to check for the confirmation email while you’re on the call.

Tools for registration:

Map Your Show, **Eventbrite** and **ShowClix** are good registration platforms. **TicketLeap** offers an all-mobile option.

If you need to create web pages quickly, try a landing page tool like **Unbounce**.



GET YOUR PERMITS AND INSURANCE



One of the benefits of working with a venue or agency that has experience handling events is that they may be able to obtain all the permits. Most hotels and conference locations should have a checklist that covers the permits you'll need for parking, alcohol, sound, street closure, and anything else that applies.

If you don't have the guidance of an event venue, you can find information about the permits required by researching or contacting your local government's entertainment commission or events office.

Special event insurance will protect you in case of lawsuits, injury, and property damage, and is a must for an event of almost any size. The laws and coverage vary across states and countries, so try browsing websites that offer free event insurance quotes first to get an idea of what you will need.

Start the permits and insurance process as soon as you've confirmed the venue. All the event pros who contributed to this guide had the same message regarding permits and insurance: don't mess around.

02 PART TWO

Marketing Your Event





The most successful event promotion starts early and utilizes multiple channels. Your audience will find you in different ways. They'll respond to a variety of approaches.

Your event marketing mix may include email campaigns, traditional call-downs, digital ads, public relations, social media, partner promotions, referrals, direct mail, print media and more.

Stick to a marketing timeline. List the promotions and messages you need to share, and map each marketing channel to the timeline.

Finally, to accurately measure the return on each marketing effort, assign a unique registration URL to each marketing channel and make sure buttons and calls-to-action all direct to this URL. Most registration software providers will have this option built-in. This way, when you view your list you'll be able to see where each registrant came from.



Email campaigns

Your success rate with email marketing will vary within an industry, but it's the cornerstone of your event promotion and will usually deliver the largest number of registrants.

It's customary to send a total of about 4-8 emails to a list member who hasn't yet registered. Each email should have a different message and a different spin on the urgency to "register now". (Remember, if a list member registers, immediately stop sending them emails soliciting registration!)

Check out the next few pages—we've put together a sample email campaign for you to use as a template.

Email marketing GUIDELINES

- Use an email marketing tool like **MailChimp**, or send emails through a marketing automation tool like **Marketo** or **Eloqua**. (There are plenty of affordable and even free options that are good for emails.)
- Don't send emails from a personal address or use the BCC function.
- Keep your subject lines short and to-the-point.
- A/B test your subject lines. You can use language from the "winning" lines in your follow-up and reminder emails.
- Include a clear call-to-action in your email. If a recipient wants to register for the event or learn more, she needs to know where to click.
- Provide an unsubscribe link in your emails. It's a requirement to comply with CAN-SPAM regulations.
- Don't email too often. A couple times a week at most.
- Check your email provider's analytics for bounces and unsubscribes. This will help you determine list quality/relevance and whether your message is resonating.

Email #1: Save-the-date

Send this email as far ahead of the event as possible—it's a great way to get a spot on the calendars of attendees who are the most likely to register. You'll be generating buzz about your brand, and you can take this opportunity to ask for feedback about your agenda.

Include the date and location, a teaser about any speakers or attractions you've confirmed, and maybe a video or photo from the last event.

Email #2: Early bird invitation

Is your registration system tested? Is your event agenda posted? (A link to your web-based mobile guide is enough.) You're ready to send an early bird invite! Most pros send this promotion around 2-4 months prior to the event.

If you plan to sell tickets at a discounted rate, this first email is the place to share that offer. Generate some urgency by making it clear that these discounted tickets are in limited supply and a prospective registrant will need to act fast.

The WebCAM team runs a promotion called "Temporary Insanity" several months before the conference. The pitch: This is the lowest price you can possibly pay, and you can only get this price if you bring someone who has never been to the conference before.

"It's our #1 promo," says Mark Knowles. "It literally forces growth. We get so much momentum out of it!"

Tip: Encourage people to sign up early without alienating them from the regular ticket sale. It's a good strategy to share, up-front, all ticket prices and the dates they can be acquired.

Email #3: Early bird reminder

Let your email recipients know that time is running out for these high-value tickets.

Just 24 hours left!
Get tickets while they last!
Save 30%-buy today!
Last chance to save \$200 off the regular ticket price!

Email #4: Main sale invitation

Now that the time to buy discounted tickets has passed, shift the message. Focus on the value the event will deliver, and accompany it with social proof statements and highlights from the upcoming event. Include an event-related tweet from your keynote speaker. Share an exciting update to the schedule.

Email #5: Main sale reminder

At this point... well, you've sent quite a few emails. You can assume that anyone on your list who has actually opened and read your emails understands the basic value propositions of your event. So it's time to get a little creative!

Highlight the social and networking aspects of your event. Cool parties or musical guests? Unique food and drinks or a fun venue? This is the time to talk about the sponsor party with the open bar!

Email #6 Last chance tickets

By now you have access to data that helps you understand who's registered so far. Your final email can focus on the dwindling number of remaining tickets or the volume of high-quality registrants.

400 of San Francisco's best dentists will be there.
Will you join them?
26 tickets left!



Traditional call-downs

Call potential attendees to let them know about your event. Make the calls during business hours, be personal and friendly, and be prepared to quickly explain why your event is relevant to the person you're calling.

What if you reach more voicemail systems than actual people? It's an acceptable practice to call about 3-4 times over the course of two weeks if you haven't reached someone by phone. Leave voicemails that are short and direct—25 seconds or less.

Tools for email marketing

Depending on your event's size or complexity, you can try an out-of-the-box email solution like [Mailchimp](#) or a marketing automation system like [Marketo](#).



Explain the compelling details about your event and why the call recipient should take notice. Provide instructions for a follow-up: a callback number and a web URL where they can sign up.

When you get someone on the phone and they're ready to register, fill out the form for them while you're on the call.

Important: Always compare your call list against the list of people who have already registered for your event. Don't call someone who has already signed up!



Digital advertising

Digital ads can target and expand your audience, measure the success of your marketing message, and get immediate feedback on the program's return on investment.

It'll work best if you stick to digital channels that are friendly to time-bound promotions. (Google AdWords is not your best choice.)

Facebook Ads and **LinkedIn Ads** offer self-serve platforms that allow you to put ads in front of a very targeted audience for a short time period. For example, it would be easy to target San Francisco-area dentists.

You can put banner ads on relevant websites using a display advertising tool like **Google AdSense**, or target your display ads to relevant web searchers with **Retargeter's** search retargeting platform.

Whichever paid digital advertising solution you use, pay attention to your registrations from that source. The volume and quality of registrations from a given advertising source can give you instant insight into the messages that are working best for you—and you can use this language in your emails and social media.



Social Media

Event marketing and social media marketing: they go hand-in-hand. These days, members of even the most traditional industries are using social media. You have the opportunity to share your message, generate buzz in the industry, and increase event attendance/engagement through the social channels your audience and partners are using every day.

Each social network can be used to promote messages from *other* networks. If you create a blog post about your event, you can share that link on Twitter, Facebook and LinkedIn. If you are creating Vine videos about your event, you'll want to link to them from networks that are more commonly used by your customer base.

Let's talk about how you can get the most out of social channels, and how you can get your sponsors and partners involved.



With Twitter, you can share short messages and links and have two-way conversations with your audience. As an event professional, you'll be using Twitter for two primary purposes:

- Generating buzz and sharing information about your event
- Engaging with your audience and attendees to get to know them and to learn—for better or worse—what they are saying about your event

Your interactions on Twitter work just like conversations in real-life. If all you do is talk, eventually people will stop listening to you. But if you ignite conversations, reach out to individuals, answer questions, and show that you are taking the conversation seriously, you have the opportunity to get people on board with your organization. They might even share your message for you!

Twitter Hashtag

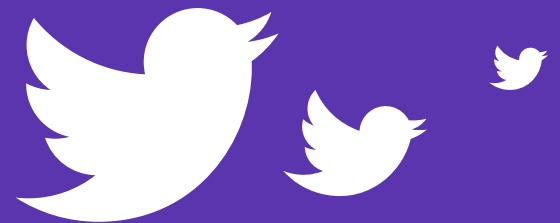
DO I NEED ONE?

Choose a hashtag early on: before you choose your save-the-date information. Stick to the same hashtag consistently throughout the event.

A hashtag is a word or phrase shared in tweets. It can be searched, indexed and shared. Appending your tweets with a hashtag and encouraging your audience, attendees and partners to do the same will help you amplify and measure your social media influence.

More specifically, you can use the hashtag to pull together people's event-related photos and messages in real-time, and share them in your mobile guide and on your website. Your attendees can search the hashtag to see what other people are saying.

Learn specific tips for the hashtag on the next page!





Here are some ideas to help you get the most out of Twitter for events.

- Put the power of sharing in your registrants' hands! Events are exciting, and people want to share that feeling. Include clickable social media icons in the pre-event informational emails to your registrants. Share your event hashtag and embed a button with a pre-filled tweet.
- Put your social media icons and hashtag on the registration thank-you page.
- Use Twitter to share info about your keynote speakers. Include the speakers' Twitter handles in the tweets so *they* can continue the conversation.
- Tweet out teaser videos, sponsor updates and messages about promotions and ticket scarcity.
- Pre-fill your hashtag into the Twitter application in your mobile event guide so it gets used every time.

Hashtag

BEST PRACTICES

1. Your event hashtag must be short. Twitter restricts posts to 140 characters, and if your hashtag is too long users will leave it out in order to fit what they need to say.
2. It needs to be unique. Use the search function in Twitter to make sure your preferred hashtag isn't being used by another organization or trending topic.
3. It needs to be relevant and easy-to-understand by someone who isn't familiar with your event.

Strong hashtags:

#DentalCon2015

#SFDentists2015

Less-effective hashtags:

#Dentists (Too broad)

#SFDC (recognized by a different organization)

"We made a mess of the hashtag this year," says Tracy Robey, who ran the 2014 RSA annual meeting. "We were getting feedback that the hashtag was too long, so we had to change it mid-conference."

(It wasn't the end of the world. In the spirit of learning from mistakes, Tracy helped come up with a new hashtag, announced it on Twitter, and moved on with the show!)

FACEBOOK

Facebook is the largest social network in the world, with the most demographically-broad user base. This means that your audience is using Facebook!

- Create an event or fan page where people can post comments and feedback
- Link directly to your registration page
- Share venue photos or videos of your speakers
- Encourage conversation on your event page by asking questions, running contests, and linking to surveys

VINE

Vines can showcase the exciting moving parts of your event long before you open the doors. The Vine platform is 6-second videos with a social twist. Share preparations for the event: the menu tasting, the raffle prizes or art to be auctioned, or a tour of a cool part of the venue.

Vines are perfect for teaser-type content and breaking news. They're short enough to be immediately digestible, and users can comment and respond. You can shoot them with your mobile camera in seconds.

Idea: ask a speaker or sponsor to make a Vine teaser. Embed it on your blog, add an icon in your event's mobile app, and tag it with your hashtag to create a feed of Vines that your audience can peruse.



LinkedIn Groups give you an effective way to grow your audience, and promote your registration page.

Groups are user-built communities focused around an industry or interest. Participants can post questions, conversations, links, and jobs, and they can network with like-minded individuals.

Search LinkedIn for Groups whose members are relevant to your audience. To post in a Group, you will need to become a member. Group posting etiquette asks that you become an engaged member of the Group before promoting your cause, so join Groups early and become a part of the conversation first.

- Share blog posts with topics related to your speakers' talks. Include a link to your registration page at the bottom.
- Start conversations with a question! The most active posts in a LinkedIn Group will come from a request for help or advice.

Social Media Tools

Track activity, schedule tweets and updates, and create lists to follow on multiple networks with a free web app like [Hootsuite](#).

Try a more robust tool like [Radian 6](#) for social media metrics and analysis.





Public relations

Drive awareness and event credibility with industry press and blog coverage. Give these publications a good story early on, then treat them well at the event (potentially granting free press tickets). You may be able to get more than one story out of the relationship!

Be prepared to pitch the press with a strong hook and a concise list of event details.

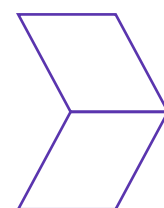
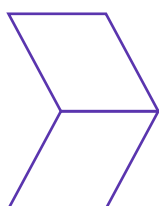
The hook:

Your PR hook is a compelling one-sentence explanation about your event. It's what makes a story newsworthy. Don't use the same hook for every publication you approach; it should be tailored to the outlet and the writer.

Tools for PR

PR Newswire and **PRWeb** for press release distribution.

Wunderlist and **Workflow** keep you organized.





Partner promotions

If you plan to work with sponsors or partners at your event, you have a great opportunity to get someone else to do some of the marketing work. You just have to make it easy!

Sponsors definitely expect a return on investment from your event, but they might *also* benefit from a reminder that registration volume is directly correlated to that return.

Ask your sponsors to send event invites via email. Prompt them to share social events and offers on Twitter. Coordinate so their promotions happen at the same time as yours: you don't want sponsors talking about early bird prices when you've moved on to the main ticket sale.

- **Will you be at the Dentist's Weekend? Join us at Booth 212 for prizes and drinks.**
- **Don't Miss It: Open Bar Cocktail Reception Sponsored by PlusDent!**

Make it painless and increase the chances your partners will actually play along. Send them ready-to-use marketing materials like HTML emails, PDFs, tweet copy suggestions and landing pages. Give them a promotional calendar and outline the expectations.

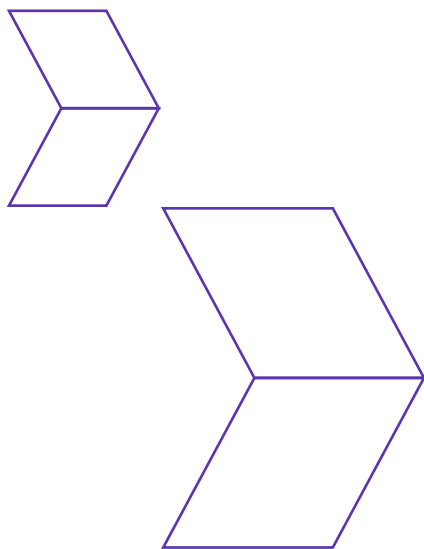


Referrals

What would you pay to get a registration without having to find it yourself? With a referral program, your fans can generate signups for you in exchange for a reward.

Put a referral offer on the thank-you page of your registration and in the confirmation email. Share the offer on Twitter and LinkedIn.

- Refer a friend and we'll give you free VIP seating at the keynote!
- Share The Love: If you refer a friend, we'll give you both \$50!



Tools for Referral Programs

Ambassador and **Extole** are tools that manage your referral programs, including keeping track of who refers who and what rewards they're owed.

LOW REGISTRATIONS?

You're evaluating registration growth throughout the promotion period to determine which channels are performing and to make sure you're on track to meet your goal. But what if registrations aren't what you expected?

- Test the system. First, perform some troubleshooting to be absolutely sure your registration process is working smoothly all the way through. Test every landing page. Click every button.
- Review registration time stamps, looking for long gaps without any signups. This could indicate a website or software malfunction.
- Call a few of the people who *were* able to sign up, and ask if there were any hiccups in the process.

If it seems like there's nothing wrong with the system, it's time for some new conclusions. Maybe your message isn't compelling enough. Maybe you've targeted the wrong people, or you just need a different approach.

Try these tips for a quick boost in registration.

- Launch a new offer. What would happen if you blasted your channels with a 24-hour offer that would include a night's hotel stay, a special VIP entry, or even a limited-edition t-shirt? Get your speakers and sponsors involved in sharing the news!
- Focus on the sponsors. Your sponsors have brand credibility and they could be a big selling point. Launch a campaign centered around your sponsors and what they have to offer at the event.

- Show off your mobile app. This is the most comprehensive and easy-to-navigate collection of all your event information: schedules, speaker and sponsor info, maps and party details. Include the app download instructions in your emails so people can peruse the app right away and get excited about your event.
- Ask for social shares. Create a contest: Registrants and audience universe members who share your registration link will be entered to win.
- Market the *details*. Tell your audience about specific sessions, parties and speakers.
- Start an online conversation with your speakers and panelists. Host a Q&A on Twitter, revealing some of the topics of your upcoming sessions.
- Create more urgency. When you need an emergency boost, it may be appropriate to try some more dramatic language. Tweak the calls to action on your landing pages and in your social posts. *Register Now! Time is Running Out!*
- Ping the press. This could be a good time to give a free ticket to a reporter or blogger you've worked with pre-event. Give them access to the schedule and the mobile app, and put them in touch with the keynote speaker for an interview.
- Boost visibility on Facebook. It's very easy to pay to get your post in front of more people with the "Boost Post" feature. Just choose a budget, then specify targeting and the number of eyeballs you'd like to see your post.

03 PART THREE

Getting Ready On-Site



Ideally you'll be able to complete a site walk-through and meet with the entire team a week before the event.



Event entry

How will your guests, sponsors and staff be arriving?

Parking

Email your visitors an entrance map, and include one in the mobile event app. Attach detailed instructions if parking is tricky. Once they're on the property, parking attendants and valets can direct them to the entrance (or you can use signage).

Shuttles or limos

Include pickup details, contact info and special instructions in your mobile guide, and remind guests through email that they should download the guide *before* they leave for the event.

Security

Will you be using a security team to verify identity or age, or to establish a secure "presence"? Make sure the team understands exactly what you expect of them. Give them a written outline of their responsibilities. Be very clear about the situations in which they're expected to interact or intervene.

A visible security presence can be comforting to attendees, but it also has the potential to affect your brand image negatively. Work with an established event security provider. Check references and reviews.



On-site registration

The registration line is your chance to make a good (or bad!) first impression. Your attendees are making judgments about the event as a whole based on this process. They're standing around looking at their phones, and they're more likely to share their experience on Twitter and Facebook. So make that experience positive!

- Alleviate registration “rush hour” by offering pre-event registration in the days leading up to the event.
- Registration staff should know the venue and the schedule well enough to answer every question. They should know how to direct users to download the mobile app.
- Offer coffee and snacks in the registration area and set up some tables and chairs so people will have a place to go through tote bags and wait for friends.
- Post the instructions for downloading your mobile event guide so attendees waiting in line can begin perusing the schedule and planning their day.



The opportunity for human error is tremendous when you try to work without an established system.

Romy Yan - PRIME

Romy cautions against using a printed spreadsheet to check in guests at the door.



Audio/Visual

Touch base with your speakers, sponsors, and anyone who is presenting publicly, and determine what A/V support they need. If speakers plan to present slides from their own laptops, confirm what type of computers they have and add the necessary connectors to your supplies list. If your presenters will be sending in their slides in PDF or .PPT format, require the final versions 48 hours prior to the event.

Test all projectors, microphones, audio equipment and technical connections. Confirm who will be moving equipment if it needs to be re-used elsewhere during the event.



Team run-through

Once you have your team in place, work through the entire event to make sure there aren't any gaps. "I like to begin with a full needs assessment," says Romy from PRIME. "It's an A-to-Z with the whole team, going over everything we will need for the event."



Print a run-of-show document and share it with everyone. It's detailed down to the minute if it needs to be.

Dayna Rosen, Go! Experience Design

Dayna, a corporate events producer, works directly with dozens of global finance, automotive and television brands: ideating, managing and executing their customer-facing and internal events.

Walk through the event plan and confirm that every element is assigned to someone who is accountable for it. Quiz the owners of each task on their plans for various contingencies. If you workshop potential problems now, it will really take the pressure off when they happen!

Set your level of expectations. Talk to the team about who the attendees are. Everyone on the team—from the hotel's front desk team to the security detail—needs to know who your guests are and how they should be treated.

Picture the event from the attendee's perspective during this walkthrough. Are transitions smooth? Is anything confusing? This is your last chance to find wrinkles in the plan.

Require that all team members arrive at the location at least 1 hour prior to the event. Make sure you have a secure place for staff to keep their personal items.

Last minute tasks

- Lock down the agenda. It needs to be consistent on your website, mobile app and printed materials.
- Confirm times and details with your speakers. Double-check their hotel reservations.
- Confirm sponsor setup times and booth assignments.
- Provide caterers with a final count.
- Touch base with press to confirm their attendance.
- Go over the equipment checklist.
- Share emergency and staff phone numbers with the team.
- Test the registration system a final time.
- Write checks for any payments that need to be made on-site.
- Confirm that all permits are completed and signed.
- Review your top-level goals to help you and your team focus.

04 PART FOUR

The Event



All of the planning, coordination and hard work are about to pay off! You will be called upon during the event by staff members looking for guidance or help, but try to spend some of your time acting like an attendee. This will help you evaluate the whole experience.

Keep it moving

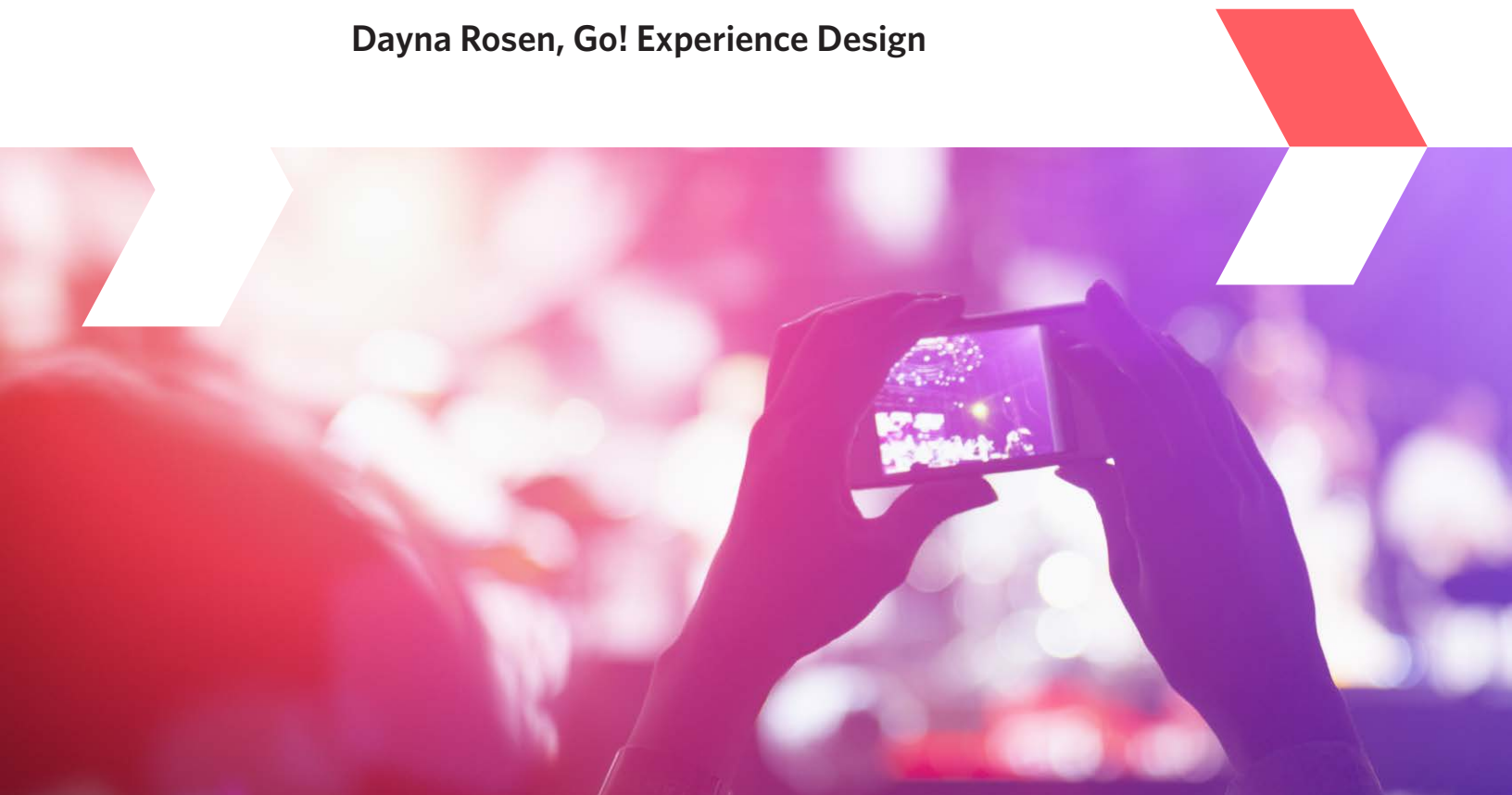
“I’m running around on a headset making sure everyone is where they are supposed to be,” says Dayna from Go! Experience Design. “I’m telling them to take their cell phones out of their pockets and to wear their mics correctly.”

Circulate the event space. Check in with sponsors and speakers. Chat with guests about the experience. You will get the best idea of the event’s efficiency and experience by making the rounds.



Even when things get hectic, you have to trust your team. You’ve all worked to get to this moment. You all have the same goal.

Dayna Rosen, Go! Experience Design



Mark, one of Bend WebCAM's organizers, tries to circulate as much as possible. He looks for cues that someone might have a question or a concern. "It's all about the facial expression," he says. "I just step in and ask if they need anything." This gives Mark a unique view of the conference and creates a memorable experience for the attendees and speakers. He even got an Oregon server's permit so he can jump behind the bar and serve up Bend's craft beers.

Provide an official place for event feedback in real-time. As you talk with attendees, prompt them to fill out a comment card or complete an in-app satisfaction survey. This will help prevent you from getting roped into a long conversation about feedback when you need to be moving on, and it will give you the ability to follow up personally.

The schedule will tell people where to go, but you might encounter unexpected traffic patterns. Part of the venue or schedule might be getting less attention from attendees. If you notice that the exhibit hall is quiet, send a push message to guests' mobile event guides with a sponsor offer or an update. A push message will go out instantly, even to the users who don't have the app open and running on their phones.

Pay special attention to transitions. When a session ends and a new one begins, make sure attendees can exit comfortably and that they know where to go. Check that equipment is set up properly in the time between sessions, and that the room is ready when the next session starts. Monitor the setup and breakdown of a lunch or coffee break to ensure that everything is performed to your standards.

Get the message out

Your event's influence goes beyond the walls of your venue. You have the opportunity to convert your attendees into fans—and to get your fans to spread the message!

Plan ahead:

Schedule tweets and other posts ahead of time. Schedule a few posts per day, with the expectation that you or your marketing team will supplement the scheduled posts with real-time updates.

Put social front and center:

Encourage your attendees to share what they're experiencing on social media. Post the event hashtag around the venue and pre-load it as a template in your event app's built-in social media features. You can make photo sharing fun by aggregating user-created photos within the app. Project a live feed of photos and other social media shares relating to your event on a big screen in a public place. Offer prizes and giveaways for people who share photos and videos.

Get your speakers and sponsors involved:

Your event partners and VIPs have more to gain from social amplification than the average attendee. Make it easy and valuable for them to share their experience and knowledge. Promote their Twitter handles on venue signage and in the mobile event app.

Collect audience questions through social media:

Let attendees know that they can submit questions for your speakers and panelists by tweeting with your event hashtag. If there is a Q&A portion of the discussion, have the speakers take a few of the questions live. Speakers can follow up on unanswered questions within a few hours.

Try live-blogging:

Live-blogging is a great way to get people excited about the sessions and attractions at your event. Keep posts short and media-rich, and aggregate blog posts into an RSS feed. You can project the feed, tweet it, and include it as an icon in your mobile event app.

If you've had this event in the past, Mark from Bend WebCAM suggests asking speakers from previous years to help with live-blogging. "They're more likely to understand the event's culture and tone."

Share the presentation materials: Will your speakers be sharing materials after their sessions? Post PDFs and slide presentations to SlideShare, which makes social amplification easy. You can include a shortened link to the presentations in your mobile event app's session description and on any printed materials and signage.

Tools for amplifying your message

Hootsuite lets you schedule social posts and monitor your hashtag.

Use **Slideshare** to post presentation materials.

An RSS feed tool like **RSSMix** will let you aggregate tagged social posts and blogs, which you can then project on a screen or make available in your mobile event app.



05 PART FIVE

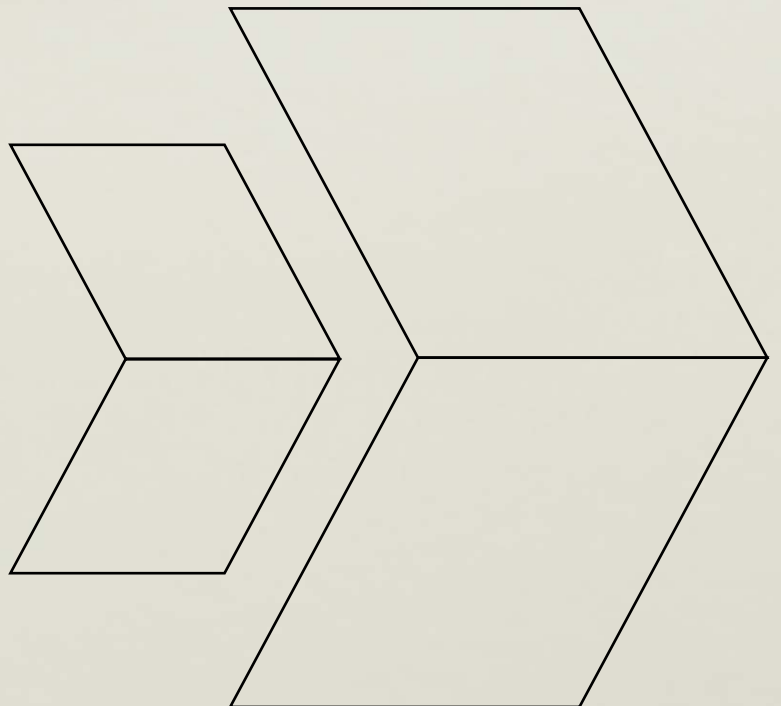
Evaluation and Follow-up





You've closed the doors and said goodbye to your guests.

What happens next?



Close the loops

Before you can rest, you need to wrap up.

- Collect files from photographers and videographers on-site before you leave.
- Check in with the strike teams, the partners who are packing up, and the security team to make sure everyone is exiting properly.
- Go over the equipment checklist for missing items.
- Take care of any vendors who require payment right away.
- Gather any lost-and-found items from the venue.
- In the morning, send an email to team members. Ask them if they have any loose ends that need to be dealt with right away.

Say thank you

A successful event is the combined work of many people. A personal, warm, sincere thank-you goes a long way toward giving a positive last impression, and helps build strong relationships for the next time around.

Make it personal. It's appropriate to send a handwritten card or a gift to sponsors, partners, donors, speakers, team members, volunteers and vendors. If you aren't planning to send something physical, send an individual email to each contributor. Don't send an impersonal mass email.

This is also a good time to ask for feedback from the people you worked with on the event. Use a survey!

Ask for specifics like how smoothly the setup and breakdown were, if there were any technical issues, and what you can do to make the event better next time. The responses you get from your team and partners are extremely valuable. If there were any complaints, it's appropriate to follow up personally, acknowledge the issue, and give an outline for how to address it next time.

Be persistent with donors

A timely follow-up to thank your donors will start the process of collecting fundraising donations. You may need to follow up several times by emailing and calling. You will get the best results with messages that are warm and personal, and absent of any language that may sound accusatory.

When you finalize a donation, send a personal thank-you right away!

Extend the lifetime

Your message and theme don't need to fade into obscurity when the event is over. A coordinated campaign of follow-ups and social media will keep attendees engaged and sharing. Your goal is to keep your event top-of-mind for as long as possible... until registration opens for the next one.

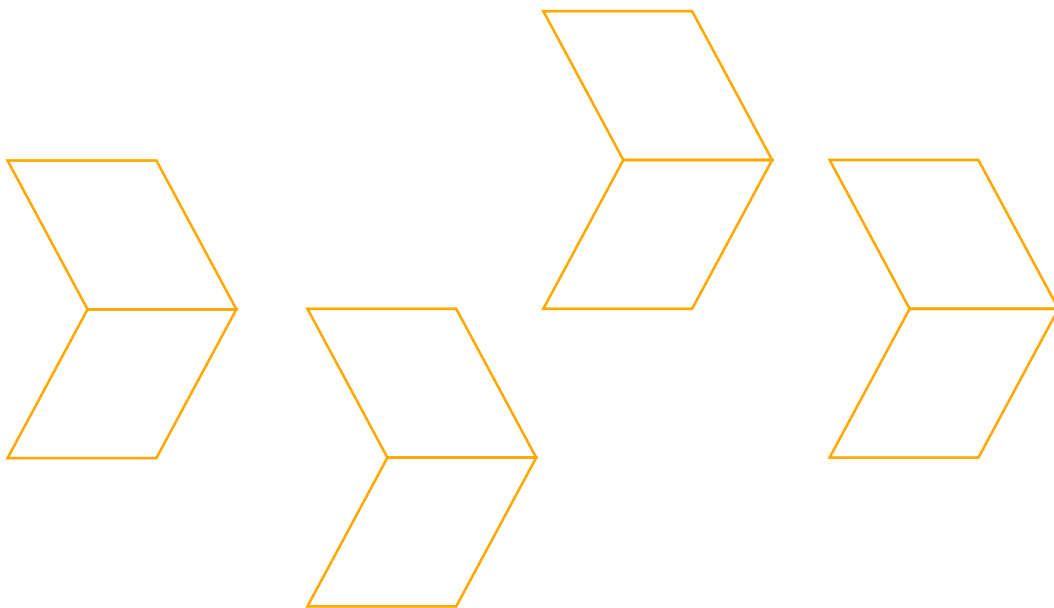
Tracy Robey's event, the RSA annual meeting, hosts some members who have been in the society since the 1950's. But many of her attendees are young and extremely tech savvy. How does she communicate to her very disparate guests, making them happy and

excited for next year's event?

“For newer members, it’s important to pay attention, and to let them know you’re listening and willing to change,” says Tracy. She has seen success from responding to social media outreach and survey results, and sharing details about how the event plans to adapt.

For older members of the RSA it’s all about upholding traditions. Tracy’s strategy for that portion of her audience includes a post-event email focus on the closing dinner, a long-held tradition.

Tracy will grow the event each year because she knows her audience, understands what they look forward to, and communicates about those elements in the follow-up campaign!



FOLLOW-UP PLAN

Collect recorded video of the sessions, speaker presentations, user-submitted photos, contest winner information, blog entries about the event, press, and anything else you can use to keep the conversation going. Gather any relevant statistics about the event, like attendance numbers and donor pledge amounts.

Create a follow-up timeline, a little like the event marketing timeline you used to promote registrations. Include all the channels you intend to use: social media, email, personal calls and more.



48 hours after the event

Channels: Email, social media

Messages:

Sponsor links

High-level stats

Contest winners

Feedback survey

5 days after the event

Channels:

Email, social media

Messages:

Posted video from the event

User photos

Speaker materials posted on Slideshare

Blog posts and press about the event

7 days after the event

Channel:

Phone call-downs

Messages:

Feedback request, thank
you

14 days after the event

Channel:

Email, social media

Messages:

Feedback responses

Speaker contact info

Two months after the event (and beyond)

Channel:

Email, social media

Messages:

Blog entries and press about
relevant topics

“Subscribe to our
newsletter”

A few months before your next event

Channel:

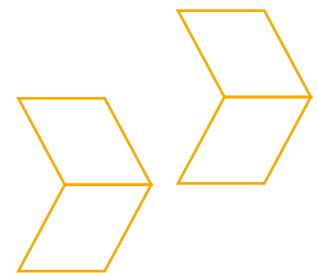
Email, social media

Messages:

“Save the date”

Video teaser

Photo gallery



Be responsive

The key to keeping your audience engaged in the coming months? Make it a two-way conversation! Ask questions, respond to tweets, follow people back and generally work to be engaged and interesting.

Evaluate

Taking a critical and informed look at the event as a whole will allow you to improve over time, will give you vital information you can use to sell to sponsors and sign up great speakers next time, and can help you understand where your budget went.

Begin to evaluate your event right away, and put your conclusions in writing!

Some types of data, like survey responses and sponsor ROI follow-up, will have to be gathered over the next few weeks and months.



If one person goes to the trouble to write a comment, there are probably thirty that didn't. We read every one, and we shift and adjust.

Mark Knowles, Bend WebCAM

Dorian Tomace, VP of Global Risk Education at MasterCard, agrees that a post-event survey is one of the best ways to evaluate your success. "We hold ourselves to a high standard, and we are always adapting," says Dorian. "Use a survey to make sure your expectations were met on content, topics, speakers, venue, location and price. Ask if it compares with other events they attend."

What should you evaluate?

Registration and attendance

How did your registration numbers compare against your goals?

What was your no-show rate?

Would you plan differently for food and budget, knowing the no-show rate?

Was the registration process smooth all the way from signup to check-in?

Would you work with the registration tool again?

What can you do to increase registration numbers and actual attendance next time?

Did your engaged audience grow before, during and after the event?

Budget

What were some of the budget “surprises”?

Were the big-ticket items worth the expense?

What would you do differently next time?

Revenue or funds raised

How did this stack up against your goal?

What can you do to be more effective as a fundraiser?

Were tickets priced appropriately?

If you gave out free or discounted tickets, did you get a return on investment?

Marketing spend and performance

Which marketing channels gave you the best volume?

Which channels generated the best cost-per-lead?

Which channels performed poorly?

Was there a correlation between specific channels and a specific type of attendee?

How would you evaluate the tools you used for marketing?

What kind of marketing mix would you use next time?

Attendee satisfaction

What did attendees say about your event in the surveys, in your follow-up calls, and on social media?

Were there any sessions or parties that fell flat?

Did attendees have complaints about the venue or the food?

Did they seem happy with the networking opportunities?

Was their perceived value of the event worth more than the price of the ticket?

Message amplification and lifetime

How many people used your hashtag before, during and after the event?

What was the volume of social shares, user photos, comments and follows?

If you wanted to encourage a specific message or tone, were you effective?

How engaged is your audience a week, a month, and 6 months after the event?

Sponsor success

Were your sponsors happy with the volume of leads they collected and the conversations they had?

Did they feel like the attendees were relevant to their customers?

After a few months, are sponsors able to report a positive return on investment?

Venue and vendor performance

Did the venue and vendor teams perform professionally and capably?

Were they able to deal with contingencies?

Would you work with them again?

Effectiveness of the events team

Was everyone on your team accountable and effective?

Were there any gaps in accountability, or team members who weren't pulling their weight?

Did you have enough staff overall?

Guidebook: Mobile Apps For Events



guidebook

Guidebook is the leading name in mobile apps for events, conferences and trade shows.

Thousands of event organizers use Guidebook. It's the easiest way to set up and manage mobile apps for your events throughout the year.

Straightforward - You don't need to hire a specialty software developer to build your apps and your team doesn't need help to add and manage content. The backend interface, Gears, is friendly and intuitive.

Supported - Guidebook's award-winning support team is always on hand for questions. You can even hire a Guide Builder or an on-site event support tech.

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