

90-Day Event Transformation Checklist

Transform Your Event ROI from 3:1 to 10:1 in One Quarter

Quick-start guide for B2B tech companies ready to implement the 300% ROI framework immediately.

How to Use This Checklist

This 90-day plan gets you from traditional event tactics to revenue infrastructure in one quarter. Each day has specific, actionable tasks.

✓ = Complete

→ = In Progress

⚠ = Blocked (needs attention)

MONTH 1: Foundation (Days 1-30)

Week 1: Assessment & Planning (Days 1-7)

Day 1:

- ☐ Calculate ROI from last 3 events
- ☐ Identify which events drove actual pipeline
- ☐ Document current challenges

Day 2:

- ☐ Map your current tech stack
- ☐ List integration gaps
- ☐ Identify data blind spots

Day 3:

- ☐ Interview sales team about event leads
- ☐ Review CRM for event-sourced opportunities
- ☐ Calculate average deal size from events

Day 4:

- ☐ Set 90-day ROI improvement target
- ☐ Define specific pipeline goals
- ☐ Establish content creation targets

Day 5:

- ☐ List all events in next 6 months
- ☐ Select pilot event (8-12 weeks out)

- ☐ Create event selection criteria

Day 6:

- ☐ Define ideal attendee profiles
- ☐ Set pre-meeting targets (80%+ of booth time)
- ☐ Create qualification criteria

Day 7:

- ☐ Hold kickoff meeting with team
- ☐ Assign roles and responsibilities
- ☐ Get executive buy-in

Week 1 Goal: Clear baseline and improvement targets defined

Week 2: Technology (Days 8-14)

Day 8:

- ☐ Download Event Technology Selection Guide
- ☐ Create platform shortlist (3-4 options)
- ☐ Review integration requirements

Day 9:

- ☐ Schedule vendor demos for Week 3
- ☐ Prepare evaluation scorecard
- ☐ Compile team requirements

Day 10:

- ☐ Research customer reviews
- ☐ Check Capterra, G2, TrustRadius
- ☐ Note common complaints

Day 11:

- ☐ Reach out to 2-3 customer references per platform
- ☐ Prepare reference questions
- ☐ Schedule reference calls

Day 12:

- ☐ Call customer references
- ☐ Document feedback
- ☐ Update evaluation scorecard

Day 13:

- ☐ Attend first vendor demo
- ☐ Take detailed notes
- ☐ Have IT team evaluate integration

Day 14:

- ☐ Attend remaining demos
- ☐ Complete comparison matrix
- ☐ Make preliminary selection

Week 2 Goal: Platform selected and contract negotiated

Week 3: Implementation (Days 15-21)

Day 15:

- ☐ Sign platform contract
- ☐ Schedule implementation kickoff
- ☐ Set go-live date

Day 16:

- ☐ Implementation kickoff call
- ☐ Set up admin accounts
- ☐ Configure basic settings

Day 17:

- ☐ Map CRM fields to platform
- ☐ Begin integration configuration
- ☐ Test basic data sync

Day 18:

- ☐ Import historical attendee data
- ☐ Set up user permissions
- ☐ Configure SSO if needed

Day 19:

- ☐ Build registration templates
- ☐ Create email templates
- ☐ Design mobile app branding

Day 20:

- ☐ Configure CRM integration
- ☐ Test bidirectional sync
- ☐ Verify opportunity tracking

Day 21:

- ☐ Set up analytics dashboards
- ☐ Configure real-time alerts
- ☐ Run end-to-end test

Week 3 Goal: Platform configured and integrated

Week 4: Training & Process (Days 22-30)

Day 22:

- ☐ Marketing team training (2 hours)
- ☐ Platform basics walkthrough
- ☐ Practice building events

Day 23:

- ☐ Sales team training (1.5 hours)
- ☐ Lead capture demo
- ☐ CRM integration overview

Day 24:

- ☐ Create pre-event workflow document
- ☐ Build prospecting templates
- ☐ Design outreach sequences

Day 25:

- ☐ Create during-event playbook
- ☐ Build team coordination procedures
- ☐ Set up real-time communication

Day 26:

- ☐ Create post-event workflow
- ☐ Build follow-up sequences
- ☐ Design nurture campaigns

Day 27:

- ☐ Document content creation process
- ☐ Assign content capture roles
- ☐ Create publishing calendar template

Day 28:

- ☐ Create quick reference guides
- ☐ Set up support channels

- ☐ Schedule ongoing training sessions

Day 29:

- ☐ Review all documentation with team
- ☐ Address questions
- ☐ Make refinements

Day 30:

- ☐ Month 1 retrospective meeting
- ☐ Review progress against timeline
- ☐ Adjust plan if needed

Week 4 Goal: Team trained, processes documented

MONTH 2: Execution (Days 31-60)

Week 5: Pilot Event Build (Days 31-37)

Day 31:

- ☐ Build pilot event in platform
- ☐ Set up registration page
- ☐ Configure UTM parameters

Day 32:

- ☐ Create session schedule
- ☐ Upload speaker profiles
- ☐ Add sponsor information

Day 33:

- ☐ Set up networking features
- ☐ Configure meeting scheduler
- ☐ Enable gamification

Day 34:

- ☐ Build mobile app experience
- ☐ Upload resources and materials
- ☐ Test all functionality

Day 35:

- ☐ Create automated email sequences
- ☐ Pre-event (8-week, 4-week, 2-week, 1-week)
- ☐ Post-event (Day 1, Week 1, Week 2, Month 1)

Day 36:

- ☐ Set up CRM campaign tracking
- ☐ Create opportunity tags
- ☐ Configure attribution fields

Day 37:

- ☐ Soft launch to internal team
- ☐ Gather feedback
- ☐ Make final adjustments

Week 5 Goal: Event built and ready for prospecting

Week 6-7: Pre-Event Prospecting (Days 38-51)**Day 38-40:**

- ☐ Research attendee list
- ☐ Identify top 50 target accounts
- ☐ Prioritize by fit and intent

Day 41-43:

- ☐ LinkedIn outreach to targets
- ☐ Personalized connection requests
- ☐ Share valuable content

Day 44-46:

- ☐ Email outreach sequence
- ☐ Offer to schedule pre-event meetings
- ☐ Share session recommendations

Day 47-49:

- ☐ Follow up with interested prospects
- ☐ Schedule 30-minute meetings
- ☐ Block calendar for on-site meetings

Day 50-51:

- ☐ Confirm all scheduled meetings
- ☐ Prepare custom materials for each
- ☐ Research each attendee/company

Week 6-7 Goal: 80%+ of event time scheduled with qualified meetings

Week 8: Pre-Event Week (Days 52-58)

Day 52:

- ☐ Final team briefing
- ☐ Review objectives and KPIs
- ☐ Confirm roles and responsibilities

Day 53:

- ☐ Send final reminders to registrants
- ☐ Push app downloads
- ☐ Share last-minute schedule updates

Day 54:

- ☐ Brief booth staff on platform features
- ☐ Practice lead capture workflow
- ☐ Test all equipment

Day 55:

- ☐ Pack all materials
- ☐ Test backup equipment
- ☐ Create emergency contact list

Day 56:

- ☐ Travel to event location
- ☐ Set up booth/space
- ☐ Final technology checks

Day 57-58:

- ☐ EVENT EXECUTION
- ☐ Follow playbook
- ☐ Capture content continuously
- ☐ Update CRM in real-time

Week 8 Goal: Successful event execution

Week 9: Immediate Follow-up (Days 59-65)

Day 59:

- ☐ Send thank you emails (within 24 hours)
- ☐ To all meeting participants
- ☐ Include relevant resources

Day 60:

- ☐ Share session recordings
- ☐ Deploy post-event survey
- ☐ Connect on LinkedIn with new contacts

Day 61:

- ☐ Categorize all leads (Hot/Warm/Cold)
- ☐ Update CRM with meeting notes
- ☐ Schedule follow-up calls with hot prospects

Day 62:

- ☐ Begin hot prospect calls
- ☐ Aim for 50% contact within 72 hours
- ☐ Move opportunities forward in CRM

Day 63:

- ☐ Launch warm lead nurture sequence
- ☐ Weekly value emails
- ☐ Case studies and resources

Day 64:

- ☐ Publish event recap blog post
- ☐ Share on social media
- ☐ Include photos and highlights

Day 65:

- ☐ Team debrief meeting
- ☐ Review preliminary metrics
- ☐ Document lessons learned

Week 9 Goal: All leads followed up, opportunities created

MONTH 3: Optimization (Days 66-90)

Week 10-11: Content Creation (Days 66-79)

Day 66-68:

- ☐ Edit and publish session recordings
- ☐ Create individual recap posts
- ☐ Share speaker quotes

Day 69-71:

- ☐ Record podcast episodes with speakers

- ☐ Edit and produce
- ☐ Create show notes

Day 72-74:

- ☐ Write 3-5 blog posts from event
- ☐ One per major theme/session
- ☐ Include quotes and data

Day 75-77:

- ☐ Create video highlights
- ☐ Short social clips (30-90 seconds)
- ☐ Longer educational pieces (5-10 minutes)

Day 78-79:

- ☐ Compile whitepaper or e-book
- ☐ Major insights from event
- ☐ Design and format

Week 10-11 Goal: 10+ content assets created and published

Week 12: Analysis & Planning (Days 80-86)

Day 80:

- ☐ Download Event ROI Calculator
- ☐ Complete all sections
- ☐ Calculate comprehensive ROI

Day 81:

- ☐ Analyze engagement metrics
- ☐ Which sessions had highest attendance?
- ☐ What content was downloaded most?
- ☐ Which leads engaged deepest?

Day 82:

- ☐ Review pipeline creation
- ☐ How many opportunities created?
- ☐ What's the weighted value?
- ☐ Average deal size vs. baseline?

Day 83:

- ☐ Assess customer expansion
- ☐ Upsell conversations initiated?

- ☐ Cross-sell opportunities identified?
- ☐ Renewal discussions started?

Day 84:

- ☐ Calculate content asset value
- ☐ What would this cost to create?
- ☐ What leads has it generated?
- ☐ What's the traffic value?

Day 85:

- ☐ Create ROI presentation for leadership
- ☐ Show vs. target
- ☐ Show vs. baseline
- ☐ Highlight wins and learnings

Day 86:

- ☐ Present results to stakeholders
- ☐ Share team feedback
- ☐ Get approval to scale

Week 12 Goal: Complete ROI analysis showing 2-3x improvement

Week 13: Scale Planning (Days 87-90)

Day 87:

- ☐ Update playbook with learnings
- ☐ Refine all templates
- ☐ Document best practices

Day 88:

- ☐ Identify next 3 events
- ☐ Apply framework to each
- ☐ Assign team resources

Day 89:

- ☐ Train additional team members
- ☐ Share success story
- ☐ Create case study

Day 90:

- ☐ 90-day retrospective
- ☐ Celebrate wins

- ☐ Set targets for next quarter

Week 13 Goal: Framework documented and ready to scale

Success Milestones

Track your progress:

By Day 30:

- ☐ Platform selected and implemented
- ☐ Team trained
- ☐ Processes documented

Target: 100% readiness

By Day 60:

- ☐ Pilot event executed
- ☐ 80%+ meeting calendar filled
- ☐ All leads followed up within 72 hours

Target: Smooth execution

By Day 90:

- ☐ ROI calculated at 300%+
- ☐ 10+ content assets published
- ☐ Framework documented

Target: 2-3x ROI improvement

Daily Habits (Throughout 90 Days)

Every Morning:

- ☐ Review day's action items (5 minutes)
- ☐ Check critical metrics (5 minutes)
- ☐ Prioritize top 3 tasks (5 minutes)

Every Evening:

- ☐ Mark completed items ✓ (5 minutes)
- ☐ Update CRM with any new info (10 minutes)
- ☐ Plan tomorrow's priorities (5 minutes)

Every Week:

- ☐ Team sync meeting (30 minutes)
- ☐ Review metrics dashboard (15 minutes)
- ☐ Adjust tactics based on data (15 minutes)

Red Flags & Course Corrections

Week 2 Check:

If platform not selected → Accelerate demos, make decision by Day 16

Week 4 Check:

If team not trained → Add extra training sessions, push pilot event if needed

Week 7 Check:

If meetings <50% booked → Intensify outreach, expand target list, offer incentives

Week 9 Check:

If follow-up <80% complete → Automate more, add team resources, simplify workflow

Week 12 Check:

If ROI <200% → Analyze gaps, improve for next event, consider additional training

Resources Needed

Budget:

- ☐ Event platform: \$_____ (annual or per-event)
- ☐ Pilot event costs: \$_____
- ☐ Content creation tools: \$_____
- ☐ Training resources: \$_____

Team:

- ☐ Project lead (20 hours/week)
- ☐ Marketing team (10 hours/week)
- ☐ Sales team (5 hours/week)
- ☐ IT support (as needed)

Tools:

- ☐ Event management platform
 - ☐ CRM with event tracking
 - ☐ Marketing automation
 - ☐ Analytics dashboard
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Accountability Partners

Assign ownership:

Project Lead: _____

Marketing Owner: _____

Sales Owner: _____

IT Owner: _____

Weekly Check-ins:

When: Every _____ at _____

Where: _____

Celebration Plan

Milestone Celebrations:

Day 30 (Implementation Complete):

- ☐ Team lunch
- ☐ Share progress with leadership
- ☐ Small gift cards for core team

Day 60 (Event Executed):

- ☐ Team happy hour
- ☐ Share wins on social media
- ☐ Individual recognition

Day 90 (ROI Achieved):

- ☐ Team celebration dinner
- ☐ Present results to company
- ☐ Bonus/commission if applicable

Next Quarter (Days 91-180)

Your New Normal:

Apply framework to every event:

- ☐ 2-3 events per quarter
- ☐ Consistent 300%+ ROI
- ☐ Systematic content creation

Continue optimizing:

- ☐ A/B test different approaches
- ☐ Refine automation
- ☐ Scale team

Share success:

- ☐ Internal case studies
 - ☐ External thought leadership
 - ☐ Industry speaking opportunities
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Troubleshooting

"We're falling behind schedule"

→ Simplify scope, extend timeline, add resources

"Team isn't adopting platform"

→ Add training, create quick wins, gather feedback

"Integration isn't working"

→ Engage platform support, consider middleware, extend timeline

"Not seeing results"

→ Check attribution setup, review follow-up process, audit lead quality

Download Complete Framework

Get All Resources:

- ☐ 300% ROI Event Planning Checklist
- ☐ Event Technology Selection Guide
- ☐ Event ROI Calculator Template
- ☐ Event Implementation Roadmap

Need Help? Contact Sproutworth for personalized coaching and implementation support.

Questions? Email: [contact information]

Resources: www.sproutworth.com

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START TODAY. Check off Day 1 tasks now.

The companies achieving 300%+ ROI aren't waiting. They're executing.

Your 90-day transformation starts now.