300% ROI Event Planning Checklist

Your Complete Pre-Event, During-Event, and Post-Event Success Framework

Use this checklist to implement the proven framework that Fortune 500 companies use to achieve 300%+ event ROI. Check off each item as you complete it.

8-12 Weeks Before Event

Strategic Planning

- [ ] Define specific revenue outcomes (pipeline target, expansion opportunities, partnership goals)
- [ ] Calculate target ROI using full formula: (Pipeline + Expansion + Partnerships + Content) / Investment
- [ ] Identify ideal attendee profiles and target accounts
- [ ] Research which target accounts are registered/attending
- [ ] Set up event-specific tracking in CRM with unique campaign codes
- [ ] Create event attribution framework in analytics platform

Technology Setup

- [ ] Configure event management platform with CRM integration
- [ ] Test data flow from registration to CRM opportunity
- [ ] Set up mobile app with attendee profiles and networking features
- [ ] Enable meeting scheduling functionality
- [ ] Configure automated email sequences for pre, during, and post-event
- [ ] Create custom landing pages with UTM tracking parameters

Content Planning

- [ ] Identify 10+ content assets to create from event (blog posts, podcasts, videos)
- [ ] Assign team members to content capture roles (photos, video, interviews)
- [ ] Create content templates for rapid post-event production
- [ ] Schedule content publication calendar (3-6 months post-event)
- [ ] Prepare session recording equipment and protocols

6-8 Weeks Before Event

Outreach & Prospecting

- [ ] Send personalized LinkedIn connection requests to target attendees
- [ ] Launch email sequence #1: Event introduction and value proposition
- [ ] Schedule 1:1 meetings with top 20 target accounts
- [ ] Identify speaking opportunities or panel participation
- [ ] Reach out to complementary partners for co-hosting or collaboration

- [ ] Create exclusive pre-event content for registered attendees

Team Preparation

- [ ] Brief entire team on event objectives and success metrics
- [ ] Assign specific responsibilities (booth staffing, meeting facilitation, content capture)
- [ ] Conduct role-playing exercises for booth conversations
- [ ] Create elevator pitches tailored to event audience
- [ ] Develop qualifying questions to identify high-value prospects
- [ ] Prepare sales enablement materials and demo environments

---

2-4 Weeks Before Event

Advanced Engagement

- [ ] Email sequence #2: Agenda highlights and session recommendations
- [ ] Enable attendee-to-attendee matchmaking features in app
- [ ] Send personalized meeting invitations to priority contacts
- [ ] Launch social media countdown campaign
- [ ] Share speaker interviews and session teasers
- [ ] Confirm all scheduled meetings with calendar invites

Logistics Finalization

- [ ] Confirm booth setup and technology requirements
- [ ] Test all demo equipment and backup systems
- [ ] Print QR codes for lead capture and resource sharing
- [ ] Prepare giveaways and promotional materials
- [ ] Brief team on event floor plan and key locations
- [ ] Set up real-time Slack/Teams channel for team coordination

---

1 Week Before Event

Final Preparation

- [ ] Email sequence #3: Final logistics and meeting confirmations
- [ ] Push notification: Download event app and complete profile
- [ ] Review all scheduled meetings and prepare custom talking points
- [ ] Load all content and resources into app
- [ ] Brief team on last-minute changes or updates
- [ ] Charge all devices and test internet connectivity

Performance Tracking Setup

- [ ] Create live dashboard for real-time engagement tracking

- [ ] Set up alerts for high-value prospect interactions
- [ ] Configure lead scoring based on behavioral triggers
- [ ] Establish daily team debriefs schedule
- [ ] Prepare templates for quick follow-up messages

During Event (Day-by-Day)

Daily Morning Routine

- [ ] Team huddle: Review yesterday's performance and today's priorities
- [ ] Check scheduled meetings and prepare custom materials
- [ ] Review real-time engagement data from app
- [ ] Identify hot prospects based on session attendance patterns
- [ ] Coordinate social media coverage and live updates

Real-Time Engagement

- [ ] Monitor session attendance and engagement metrics
- [ ] Track booth visits and conversation quality
- [ ] Capture photos, videos, and quotes throughout day
- [ ] Conduct on-the-spot interviews with speakers and attendees
- [ ] Send personalized follow-up messages within 2 hours of meetings
- [ ] Update CRM with meeting notes and next steps immediately

Daily Evening Routine

- [ ] Team debrief: Document wins, lessons, and action items
- [ ] Categorize leads: Hot (immediate follow-up), Warm (nurture sequence), Cold (general list)
- [ ] Schedule follow-up meetings for next business day
- [ ] Upload content captured to shared drive
- [ ] Post social media highlights and key takeaways
- [ ] Adjust next day's strategy based on engagement data

Week 1-2 Post-Event

Immediate Follow-Up

- [ ] Send personalized thank you emails to all meeting participants (within 24 hours)
- [ ] Share session recordings and resources via app
- [ ] Deploy post-event survey to all attendees
- [ ] Connect with new contacts on LinkedIn with custom message
- [ ] Schedule follow-up calls with hot prospects
- [ ] Update all CRM records with event outcomes and next steps

Content Production

- [ ] Publish event recap blog post (within 48 hours)
- [ ] Create social media highlight reel
- [ ] Compile attendee testimonials and quotes
- [ ] Begin editing podcast interviews with speakers
- [ ] Share internal team debrief document
- [ ] Send speaker thank-you notes with content sharing plan

Performance Analysis

- [ ] Calculate preliminary ROI metrics
- [ ] Analyze which sessions drove highest engagement
- [ ] Identify patterns in successful conversations
- [ ] Review lead scoring accuracy
- [ ] Document what worked well and what needs improvement
- [ ] Schedule team retrospective meeting

Week 3-8 Post-Event

Nurture Sequences

- [ ] Launch automated email sequence for warm leads
- [ ] Send weekly value-add content based on attendee interests
- [ ] Invite to relevant webinars or virtual events
- [ ] Share case studies aligned with their challenges
- [ ] Continue LinkedIn engagement (commenting, sharing)
- [ ] Schedule quarterly check-ins with strategic contacts

Content Distribution

- [ ] Publish individual session recap articles (1 per week)
- [ ] Release podcast episodes with event speakers
- [ ] Create infographics from key statistics shared
- [ ] Develop whitepapers or guides from themes
- [ ] Share content in sales enablement library
- [ ] Promote content through paid and organic channels

Pipeline Management

- [ ] Track all opportunities influenced by event in CRM
- [ ] Calculate weighted pipeline value
- [ ] Monitor velocity of event-sourced opportunities
- [ ] Identify expansion opportunities with existing customers
- [ ] Document partnership discussions and next steps
- [ ] Update stakeholders on event impact and ROI

Month 3-6 Post-Event

Long-Term Nurture

- [ ] Transition to monthly touchpoint cadence
- [ ] Share quarterly industry insights and trends
- [ ] Invite to exclusive virtual roundtables or workshops
- [ ] Promote early-bird registration for next event
- [ ] Continue building thought leadership on LinkedIn
- [ ] Survey attendees on content preferences and needs

Content Expansion

- [ ] Create comprehensive e-book or guide from all event insights
- [ ] Develop case studies from connections that converted
- [ ] Build resource library of event-generated content
- [ ] Repurpose content for different formats (video, audio, text)
- [ ] Use content in account-based marketing campaigns
- [ ] Measure content performance and engagement

Continuous Improvement

- [ ] Complete final ROI calculation with all revenue attributed
- [ ] Compare results to initial targets and baseline
- [ ] Document best practices and playbook updates
- [ ] Train team on lessons learned
- [ ] Refine framework for next event
- [ ] Share success stories internally and externally

Ongoing (Year-Round)

Community Building

- [ ] Maintain event alumni community platform
- [ ] Share exclusive content with past attendees
- [ ] Facilitate peer-to-peer networking opportunities
- [ ] Host virtual meetups or office hours
- [ ] Celebrate community member successes
- [ ] Gather testimonials and success stories

Preparation for Next Event

- [ ] Review performance data to inform next event selection
- [ ] Begin outreach for next event 12 weeks in advance
- [ ] Update all templates and processes based on learnings
- [ ] Refine ideal attendee profiles and target accounts

- [ ] Strengthen partnerships and sponsorship opportunities
- [ ] Build anticipation through teaser content

ROI Calculation Worksheet

Pipeline Generated:

- New opportunities created: $_______
- Existing opportunities advanced: $_______
- Weighted pipeline value: $_______
- **Subtotal A: $_______**

Customer Expansion:

- Upsell conversations initiated: $_______
- Cross-sell opportunities: $_______
- Renewal discussions accelerated: $_______
- **Subtotal B: $_______**

Partnership Value:

- Strategic partnerships formed: $_______
- Co-marketing agreements: $_______
- Technology integrations: $_______
- **Subtotal C: $_______**

Content Assets:

- Blog posts (10 × $500): $_______
- Podcast episodes (5 × $1,000): $_______
- Videos (3 × $2,000): $_______
- Case studies (2 × $3,000): $_______
- **Subtotal D: $_______**

Total Event Investment:

- Direct costs (booth, travel): $_______
- Personnel time: $_______
- Technology: $_______
- **Total Investment E: $_______**

Event ROI Calculation: ROI = [(A + B + C + D) - E] / E × 100%

Your Event ROI: _______%

Quick Reference: Red Flags to Avoid

❌ Arriving without pre-scheduled meetings
❌ Tracking leads in spreadsheets instead of CRM
❌ Sending one generic follow-up email to all attendees
❌ Missing attribution tracking for event-influenced opportunities
❌ Failing to create content assets from event
❌ Treating event as isolated marketing tactic
❌ Measuring success by booth traffic instead of pipeline
❌ Lacking integration between event platform and CRM

Success Indicators: You're Doing It Right

✅ 80%+ of priority meetings scheduled before event
✅ Real-time lead scoring and qualification during event
✅ Personalized follow-up within 24 hours of each meeting
✅ 10+ content assets published within 90 days
✅ Clear attribution from event attendance to opportunities
✅ Automated nurture sequences based on engagement
✅ Year-round engagement with event attendees
✅ ROI calculation including all value drivers

Next Steps:

1. **Download the Event Technology Selection Guide** to choose the right platform
2. **Get the Event ROI Calculator Template** for detailed financial tracking
3. **Access the 90-Day Event Transformation Checklist** for implementation roadmap

Questions? Contact Sproutworth for personalized event strategy consulting.