

Event Implementation Roadmap Template

Your 12-Week Path to 300% Event ROI

Transform your event strategy from tactical marketing to revenue infrastructure.

Overview

Timeline: 12 weeks to first optimized event

Team Required: Marketing, Sales, Operations

Expected Outcome: 2-3x improvement in event ROI

WEEK 1-2: Foundation & Assessment

Week 1: Baseline Assessment

Monday:

- ☐ Gather data from last 3-5 events
- ☐ Calculate current average ROI
- ☐ Identify gaps in measurement

Tuesday:

- ☐ Map current tech stack (CRM, MA, Analytics)
- ☐ Document current event workflow
- ☐ List pain points and inefficiencies

Wednesday:

- ☐ Interview sales team about event leads quality
- ☐ Review CRM data on event-sourced opportunities
- ☐ Calculate time-to-close for event leads

Thursday:

- ☐ Audit current content creation from events
- ☐ List all tools currently used for events
- ☐ Document integration gaps

Friday:

- ☐ Compile findings into assessment report
- ☐ Present to stakeholders
- ☐ Get buy-in for transformation initiative

Week 2: Goal Setting & Planning

Monday:

- ☐ Define specific ROI targets (be ambitious: 300%+)
- ☐ Set pipeline generation goals per event
- ☐ Establish content creation targets

Tuesday:

- ☐ Identify upcoming events for next 12 months
- ☐ Select pilot event for new framework
- ☐ Create event selection criteria

Wednesday:

- ☐ Define ideal customer profiles for events
- ☐ Set meeting scheduling targets
- ☐ Establish lead qualification criteria

Thursday:

- ☐ Create project plan with milestones
- ☐ Assign team roles and responsibilities
- ☐ Set up project management system

Friday:

- ☐ Kickoff meeting with full team
 - ☐ Review timeline and deliverables
 - ☐ Address questions and concerns
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WEEK 3-4: Technology Selection

Week 3: Platform Evaluation

Monday-Tuesday:

- ☐ Review Event Technology Selection Guide
- ☐ Create shortlist of 3-4 platforms
- ☐ Schedule demos for Week 4

Wednesday:

- ☐ Define must-have vs. nice-to-have features
- ☐ Create evaluation scorecard
- ☐ Assign demo attendees

Thursday:

- ☐ Reach out to platform references
- ☐ Review customer testimonials and case studies
- ☐ Check integration capabilities with your stack

Friday:

- ☐ Prepare questions for vendor demos
- ☐ Compile team requirements
- ☐ Set evaluation criteria

Week 4: Vendor Demos & Selection

Monday-Wednesday:

- ☐ Attend 3-4 vendor demos
- ☐ Take detailed notes using scorecard
- ☐ Have technical team evaluate integrations

Thursday:

- ☐ Call customer references
- ☐ Complete comparison matrix
- ☐ Calculate total cost of ownership

Friday:

- ☐ Make final platform decision
- ☐ Negotiate contract terms
- ☐ Plan implementation timeline

WEEK 5-6: Platform Implementation

Week 5: Setup & Configuration

Monday:

- ☐ Kickoff with platform implementation team
- ☐ Set up admin accounts and permissions
- ☐ Configure SSO if applicable

Tuesday:

- ☐ Map CRM fields to platform fields
- ☐ Configure integration settings
- ☐ Test basic data flow

Wednesday:

- ☐ Import historical attendee data
- ☐ Set up user roles and access levels

- ☐ Configure notification preferences

Thursday:

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

Friday:

- ☐ Create first test event
- ☐ Review setup with implementation team
- ☐ Address any issues

Week 6: Integration & Testing

Monday:

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

Tuesday:

- ☐ Set up marketing automation integration
- ☐ Create automated workflow templates
- ☐ Test trigger conditions

Wednesday:

- ☐ Configure analytics and reporting
- ☐ Build custom dashboards
- ☐ Set up real-time alerts

Thursday:

- ☐ Run end-to-end test with fake registrations
- ☐ Verify all data flows correctly
- ☐ Test mobile app functionality

Friday:

- ☐ Document any issues and resolutions
 - ☐ Create troubleshooting guide
 - ☐ Plan training for Week 7
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WEEK 7-8: Training & Process Development

Week 7: Team Training

Monday:

- ☐ Admin team training session (2-3 hours)
- ☐ Walk through platform basics
- ☐ Practice building test events

Tuesday:

- ☐ Marketing team training (2 hours)
- ☐ Registration setup and management
- ☐ Communication tools and automation

Wednesday:

- ☐ Sales team training (1.5 hours)
- ☐ Lead capture and follow-up workflows
- ☐ CRM integration and data access

Thursday:

- ☐ Executive dashboard training (1 hour)
- ☐ Key metrics and reporting
- ☐ Real-time monitoring during events

Friday:

- ☐ Q&A session with all teams
- ☐ Create role-specific quick reference guides
- ☐ Set up support channels

Week 8: Process Documentation

Monday-Tuesday:

- ☐ Document pre-event workflow
- ☐ Create prospecting templates
- ☐ Build outreach sequences

Wednesday:

- ☐ Document during-event procedures
- ☐ Create team coordination playbook
- ☐ Build real-time response protocols

Thursday:

- ☐ Document post-event workflow

- ☐ Create follow-up sequences
- ☐ Build nurture campaign templates

Friday:

- ☐ Compile all documentation
 - ☐ Create process flowcharts
 - ☐ Share with entire team
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WEEK 9-10: Pilot Event Preparation

Week 9: Event Build

Monday:

- ☐ Build pilot event in platform
- ☐ Set up registration page
- ☐ Configure session schedule

Tuesday:

- ☐ Upload speaker profiles
- ☐ Add sponsors and exhibitors
- ☐ Create resource library

Wednesday:

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

Thursday:

- ☐ Create mobile app experience
- ☐ Test all functionality
- ☐ Train booth staff

Friday:

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

Week 10: Pre-Event Execution

Monday:

- ☐ Launch registration publicly
- ☐ Begin prospecting top accounts
- ☐ Schedule pre-event meetings

Tuesday-Wednesday:

- ☐ Execute outreach sequences
- ☐ Monitor registration metrics
- ☐ Adjust messaging based on response

Thursday:

- ☐ Pre-event communication campaign
- ☐ Push app downloads
- ☐ Confirm scheduled meetings

Friday:

- ☐ Final team briefing
- ☐ Review objectives and metrics
- ☐ Confirm all systems operational

WEEK 11: Execute Pilot Event

Pre-Event (Days Before)

- ☐ Daily team huddles
- ☐ Monitor registration trends
- ☐ Send final reminders
- ☐ Test all technology
- ☐ Prepare booth materials

During Event (Day-by-Day)

Morning:

- ☐ Team briefing on daily goals
- ☐ Review scheduled meetings
- ☐ Check real-time dashboard

Throughout Day:

- ☐ Execute meeting schedule
- ☐ Capture content (photos, videos, interviews)
- ☐ Monitor engagement metrics
- ☐ Send immediate follow-ups to hot prospects

Evening:

- ☐ Team debrief on day's activities
- ☐ Categorize leads (hot/warm/cold)
- ☐ Plan next day adjustments

- ☐ Update CRM with notes

Post-Event (Week After)

- ☐ Send thank you emails (within 24 hours)
 - ☐ Share session recordings
 - ☐ Deploy post-event survey
 - ☐ Begin follow-up calls with hot prospects
 - ☐ Update all CRM records
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WEEK 12: Analysis & Optimization

Monday: Immediate Analysis

- ☐ Calculate preliminary ROI
- ☐ Analyze engagement metrics
- ☐ Review lead quality
- ☐ Identify what worked well

Tuesday: Team Retrospective

- ☐ Conduct team retrospective meeting
- ☐ Gather feedback from all participants
- ☐ Document lessons learned
- ☐ Identify process improvements

Wednesday: Financial Analysis

- ☐ Complete full ROI calculation
- ☐ Compare to baseline and targets
- ☐ Track pipeline progression
- ☐ Project 30/60/90 day value

Thursday: Documentation

- ☐ Update playbook with learnings
- ☐ Create success metrics report
- ☐ Document best practices
- ☐ Refine templates and workflows

Friday: Planning Next Steps

- ☐ Present results to leadership
 - ☐ Plan rollout to additional events
 - ☐ Identify training needs
 - ☐ Set targets for next event
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Month 4-6: Scale & Refine

Monthly Actions:

- ☐ Apply framework to 2-3 additional events
- ☐ Continue refining processes
- ☐ A/B test different approaches
- ☐ Build content library from events

Month 7-9: Optimize & Automate

Monthly Actions:

- ☐ Optimize high-performing workflows
- ☐ Increase automation where possible
- ☐ Train additional team members
- ☐ Expand to new event types

Month 10-12: Master & Lead

Monthly Actions:

- ☐ Achieve consistent 300%+ ROI
- ☐ Document complete playbook
- ☐ Train other departments
- ☐ Share success stories externally

Success Metrics Dashboard

Track these KPIs weekly:

Metric	Week 1	Week 4	Week 8	Week 12
Platform Setup %	___	___	___	100%
Team Training %	___	___	100%	100%
Pre-Scheduled Meetings	___	___	___	80%+
CRM Integration %	___	100%	100%	100%
Content Assets Created	___	___	___	10+
Projected ROI %	___	___	___	300%+

Risk Mitigation

Common Challenges & Solutions

Challenge: Team resistance to new technology

Solution: Early involvement, comprehensive training, quick wins

Challenge: Integration issues with legacy systems

Solution: Work with platform implementation team, consider middleware

Challenge: Insufficient pre-event prospecting

Solution: Start outreach 8 weeks before, assign dedicated resource

Challenge: Poor lead follow-up

Solution: Automate workflows, set SLAs, integrate with CRM

Challenge: Content not being created

Solution: Assign roles, create templates, build into workflow

Decision Points

Key Go/No-Go Decisions

Week 4: Platform selection confirmed

Week 6: Integration working properly

Week 8: Team trained and processes documented

Week 10: Pilot event ready to launch

Resource Requirements

Team Time Investment

Marketing: 20-30 hours/week (Weeks 1-8)

Sales: 5-10 hours/week (ongoing)

IT: 10-15 hours (Weeks 5-6 for integration)

Leadership: 2-3 hours/week (reviews and approvals)

Budget Requirements

Platform: \$_____ (annual)

Implementation: \$_____ (one-time)

Training: \$_____ (one-time)

Pilot Event: \$_____ (event costs)

Next Steps

Week 1 Action Items:

- ☐ Schedule kickoff meeting with stakeholders
- ☐ Assign project manager/owner
- ☐ Block time for team members

- ☐ Download Event ROI Calculator
- ☐ Get Event Technology Selection Guide

Questions? Contact Sproutworth for implementation support.

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