



# EVENT SPONSORSHIP PLAYBOOK

*How to Produce a  
Successful Event*

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# Welcome to Success!

Welcome to the complex world of event sponsorship!

For many businesses, event marketing has become an important way to generate leads, showcase products, meet influencers, and sell.

Getting the most from an event requires strategic planning.

In this guide, you'll discover ideas to improve the success of your next trade show or conference sponsorship.

If you're in charge of event marketing for your business, you'll want to pay close attention to the tips and tactics on the following pages.

Use this guide to help make the most of your time—before, during, and after the event.

This information will help you deliver an exceptional experience at the event and create seamless follow-up.

I hope you enjoy it! If you find value in this guide, please let your peers know about it.

Best,

Emily Crume, Director of Strategy  
Social Media Examiner and Social Media Marketing World

# Questions to Consider

Here are some guided questions for you to answer.

Asking and actually writing down the answers to these six questions will help you achieve your ideal event outcome.

## **6 Questions to Ask Yourself**

1. What does a successful event look like for my business? What's my "ideal" outcome from the event?
2. Who is my ideal target I hope to meet at the show?
3. Am I organized and prepared to achieve the goals I set for my business?
4. What can I do to deliver a superior experience for attendees?
5. How can I amplify my presence digitally via marketing and social media?
6. How will I measure my success? What's my post-show plan?

## More on Goals

Do you have goals that map to specific, measurable, and achievable objectives?

Make sure that key people in your organization—especially sales and marketing departments—are in alignment.

Why? Often, marketing makes the arrangements for the company presence at a show. However, sales could end up on-site manning the booth, giving demos, and capturing leads.

When you know the specific outcomes you need to accomplish, it's easier to know if your event was a success.

Four common event-based goals include:

**#1: Increase awareness:** Do you need more exposure? Will you be in front of the RIGHT people who could benefit from (or recommend) your solution?

**#2: Generate leads:** Do you need more leads? Will this audience contain ideal prospects for your sales team?

**#3: Develop influencer relations:** Is your plan to locate influencers who could accelerate your exposure? Will your sponsorship help?

**#4: Direct sales:** Do you need to walk away with completed transactions? Can you easily sell your product at the event?

**An example:** A sponsor at Social Media Marketing World was a medium-sized software company. Their goal was to sign up 32 new customers for their software. They surpassed their goal by 20% and declared the investment a success.

# Know Your Key Dates

A good event sponsor team will prepare a document with key dates and deadlines. This timeline should include deadlines for approvals, shipping, and move-in.

**Tip:** Marking important dates on your calendar can help you save time, energy, and money.

Here's what a typical timeline might look like:

**12 to 10 months out:** Begin planning your budget, selecting what trade shows you'll attend, and contracting your sponsorship.

**10 to 9 months out:** Organize your on-site team and book travel and hotels to get the best rates.

**8 to 6 months out:** Work on show objectives, obtain an exhibitor manual, and source your exhibit design and production. Order any signage or booth decorations you'll need on-site.

**3 months out:** Establish your booth work schedule, set up any required outside suppliers, and plan printed marketing materials.

**8 to 6 weeks out:** Check on production of display material, order product samples and sales literature, confirm pre-event advertising and press releases, and order on-site show services.

**4 to 3 weeks out:** Write and email customer invitation letters, finalize VIP guest events, confirm shipping information and send to suppliers, and prepare training materials for staff for the show.

**2 to 1 weeks out:** Collect supplies, tickets, and service orders sent to show organizers and ensure your payment system is set up and ready to accept credit cards during the event.

**Day before/day of show:** Pick up badges, confirm arrival of display materials, equipment and literature, supervise set up, and conduct pre-show briefing with outlined goals to staff.

## Show Presence Logistics

What resources do you need to deliver a superior experience for attendees? Logistically, what furnishings, signage, and services does your booth sponsorship include?

Does your booth include the basics outlined below, or will you need to order from a supplier?

- Pipe and drape
- A demo table or podium
- Chairs and a wastebasket
- Electrical outlet and/or power strip
- Ethernet cable and/or access to Wi-Fi

**Tip:** Bring office supplies (pens/paper/tape/stapler) and some extra extension cords.

Do you have your own pop-up booth or a more sophisticated booth build with prominent signage and your logo?

Service Requests: Who's the contracted vendor? Are they on-site to handle all of your needs? You'll need to set this up ahead of time and give some method of payment to take care of any additional service charges. A convention center environment will typically have strict guidelines. Only named vendors are allowed to ship in and out of the facilities. Rules and regulations abound when it comes to labor and drayage. Become familiar with any and all guidelines.

**Tip:** Create a binder/folder with contract information. Make this a place to keep your calendar and all services/order information.

Exhibitor Move-In/Move-Out: Are there specific dates/times when you need to be on-site for setup? When does the conference end and when can you begin teardown of your booth to prepare for shipping back to home base? Plan your booth teardown and make return shipping arrangements for items and equipment ahead of time.

Exhibit Hours: When will the exhibits be open to attendees so you know when to staff? Create a schedule that accounts for light coverage during sessions and full staff during networking breaks, meal breaks, and coffee/snack events.

Security and Insurance: Know what security is in place and what your liability may be. Is an additional insurance rider required by the venue or the event organizers to cover liability?

**Tip:** Remember to take valuable items such as laptops to your hotel room at the end of the day. Lock up whatever you need to leave on-site. Don't leave giveaways out overnight.

# Booth Design

You can draw attention to your booth with special lighting, a unique booth setup, bold signage, or other eye-catching features.

How you design the experience an attendee has when interacting with your team and your booth can translate into a successful interaction or a missed opportunity.

Try to put yourself in the attendee's shoes and think in terms of what's most inviting. Warm and welcoming experiences are preferable as opposed to a cold and stark (and perhaps empty) booth.

**Mock-Up:** Design and set up your booth before you head out of town. A quick mock-up of your trade show booth to make sure you have everything you need and your booth has a good look and flow is important.

Do this before you pack things up and ship items out to the show. Even if you have a custom booth, going through a quick mock-up will help remind you of things you may have forgotten.

**Tip:** First impressions are everything and a creative booth design could give you an edge. Make your exhibit stand out. Creating an experience is what will make your booth come alive!

**Less Is More:** You want to have enough information about your solution/product or service to grab the attention of people passing by, but not so much that you overwhelm them. Give attendees a reason to stop by and learn more.

**Go Custom:** If possible, try to design elements of your booth that are specific to the event you're attending. If there's a popular hashtag, you could create a custom piece that brands your company that people will love taking a picture with.

**Signage:** Signage is often the sponsor's responsibility. Plan to bring your own. Use this opportunity to capture attention with your logo and message. There are lots of options online if you search.

**Tip:** Order things like signage early on to avoid rush charges and missed deadlines.

For basic signage, prices will range from \$500 to \$1,500 for a graphic that covers the entire back of a 10x10 booth. Pull-up banners cost around \$350 each and are easily shipped or hand-carried. They're great for multiple uses and all styles of events.

There are many companies that offer booth signage – both the stands/frames and the graphics that go on the frames. Here are some vendors perfect for online ordering:

- **Skyline:** <http://www.skyline.com/exhibits/portable-displays>
- **Displays2Go:** <http://www.displays2go.com/C-715/Trade-Show-Displays-Booths-Table-Skirts-Banners-Furniture>
- **Green House Sign:** <http://www.greenhousesign.com/>

**Location:** Your location at the event can be an asset, especially with a booth in the center or on an endcap with multiple sides exposed to foot traffic. Have a booth setup that's accessible.

If your budget or the inventory doesn't allow for a grander space, don't fret. Make the most of your location by using social media and email to connect with people ahead of the event. On-site activations can also help attract more foot traffic during the event.

**Tip:** Give attendees a reason to stop by your booth or activation. Promote a fun giveaway, raffle, or free audit of their business using your solution.

Ideas for engagement include:

- Contests – challenge
- Game of skill or beat the pro
- Enter for a chance to win...
- Useful giveaways



# Marketing Plan

Have you created a marketing plan for your event?

Your marketing might include the following:

- Online promotion
- Printed promotion
- Giveaways
- Contests
- Demos
- Lead capture (business cards or electronic scans)

Conference Guide Advertising: Is there an opportunity to place an ad in the event guide? Make your company stand out with a custom-created ad with a special offer that specifically targets event attendees.

**Tip:** A well-designed ad in a conference guide can become an evergreen marketing opportunity. Attendees often save guides for future reference.

Promotional Items: These can include exhibitor giveaways, chair drop items, lanyards, party giveaways, and so on. Giveaways may need to be pre-approved by your sponsor contact. The sponsor team may also have suggestions for popular, in-demand items or gifts that fit the conference theme.

Giveaways: Have plenty of giveaways with your company's name on them. Mints or candy can be a great conversation starter.

**Tip:** Be on point with a unique item that attendees will want to pack in their suitcase and use at home. Leave your mark with customers with a quality giveaway that lasts.

Chair Drop: Is there an opportunity to place a limited-time offer targeted to attendees on the chair of a session? Are there sessions that are relevant to your brand or solution where you can add value? Materials need to be created and shipped ahead of time. At the event, the organizer may need your assistance to ensure your materials get to the correct session. Have someone from your staff around to help out.

Lanyards: Events often have a lanyard sponsor. As a paid sponsorship, this can afford your brand great visibility not only at the event but also long after. It affords placement in most event photos and videos.

Contest/Drawings and Games: Give attendees a reason to opt into your contest. Create a filter to help identify people who have real potential to become your customer versus those in the early stages of consideration who just want to participate.

Party Sponsorships: Make a deeper connection with attendees and sponsor a social gathering. Signing on as a party sponsor at an event allows for fun ways to integrate your brand into an evening or special experience. A game, raffle, or fun activity associated with that party can also bring your company's personality to light in a more relaxed environment.

# Online Promotion

Do you have a plan to extend your physical event presence digitally with social media?

Are there resources provided by the event organizer designed to help with your pre-event promotion and outreach?

Are attendees active on social media? Get to know them long before the show by reaching out on all social media profiles and liberally using the event hashtag.

**Tip:** Don't spam the event hashtag. Instead, creatively get involved with attendees.

Dig into each individual platform to create a unique engagement strategy, such as:

- **Twitter:** Attendees may be very active on Twitter before, during, and after the conference! Use the event hashtag to engage.
- **Facebook:** Is there a Facebook event page to follow? Get on that page and engage. You'll easily be able to let everyone know you're coming and join other active conversations and event updates happening there.
- **Instagram:** Pictures often tell a great story. Add some text and the event hashtag to give your photos context.
- **LinkedIn:** LinkedIn is a great place to engage with professional profiles. Find out more about attendees and their businesses.
- **Snapchat:** Does the destination city have a tourist allure? Is there a special city geofilter you can use along with the event hashtag?
- **Live video:** There's nothing more compelling than going live on Facebook, YouTube, or Periscope before, during, and after an event. Enhance your reach with a digital sneak peek.

Here's a great article about using social media to promote your event. While it's targeted to event organizers, with a little tweaking you could apply the ideas to your sponsorship:

<http://www.socialmediaexaminer.com/use-social-media-to-promote-your-event/>

Event Photography and Video: Don't forget to schedule time to get key shots of your presence. Visuals can be used to promote your presence in a wrap report to your boss, a blog post about your time at the conference, and in your own marketing.

**Tip:** Use your smartphone to create a simple behind-the-scenes look at what went into your presence. Post it on social media. Stage a team "high-five."

Are there additional marketing opportunities you can tap into?

## Your Demo

Have you mapped out a 3- to 5-minute demo of your product for event attendees?

Maybe you already have an explainer video that can be run on repeat and used to lure in prospects?

This is often the most important piece of a sponsorship, so don't wing it or assume that the team manning the booth will know what to do.

Come up with a few scenarios to help your team get comfortable answering questions and guiding a discussion.

Your booth is the place where you're inviting attendees in to talk about their needs and how you might solve a problem. Launching straight into a sales pitch comes off as lazy and indicates you have no regard for an attendee's needs.

**Tip:** Have a plan for when technology fails. Software and Wi-Fi may not always be up or working. Make sure to have a canned demo/loop to show people; one that works even if web access is limited.

## Prepare Your Team

Have you mapped out the journey your team is about to embark upon?

Assemble Your On-Site Team: Make sure to submit personnel information for conference passes ahead of time. Refer to your contract for the number of passes included in your sponsorship. If you need additional passes, make sure to arrange for that ahead of time.

Is the team adequately educated on your plan and ways to engage with attendees?

Agenda: Outline specifics for each team member on what to do before, during, and after the event. Include links to useful resources such as hotel, travel, and the conference agenda.

Set Expectations: List out the team's to-dos and expectations at the event.

Plan staffing hours and days, allowing for some rest. Standing up for 8 hours at a stretch is exhausting.

**Tip:** Set some rules for dress codes (uniforms/t-shirts), as well as personal device use. Nothing can be more off-putting than someone head-down on a personal communication device. Smiles and open gestures should be encouraged!

Discuss meals, breaks, staffing at the booth, parties, and alcohol consumption.

If passes are available for staff to attend sessions, make sure your booth isn't left empty and staff doesn't miss what's important to them.

**Tip:** Sessions are a great time to network and drive people back to your booth.

Research: Make sure to do extensive research on the event overall. Spend time getting to know the attendees, speakers, sessions, and other sponsors.

Well-run events will have agendas and timetables on their websites well in advance of the show.

**Tip:** Business cards... Make sure to remind your team to bring plenty of business cards.

Have you thought through your success metrics and the ROI of your investment?

## Plan for Follow-Up

When you get leads, how will you follow up? Put an action plan in place to maximize lead capture.

Decide what information you'll need to capture while at the event.

To ensure that sales and marketing are in alignment on post-show contact and follow-through, map out the next stages for contacting leads.

Steps for good follow-up include:

- Put leads into your CRM from lead capture or .csv file
- Qualify with criteria from your event conversations and other research
  - Hot leads – schedule a meeting right away
  - Warm leads – put into your normal lead funnel flow for further qualification/nurture
  - Cold leads – remove
- Send a "thank you for visiting our booth" email that includes a call to action

When capturing leads/contact information from attendees at the event, make sure to let them know you'll be contacting them in the weeks to come.

One example of a timely communication is to thank attendees again for stopping by your booth and remind them of your valuable solutions and services in a post-event email.

## Was It a Success?

It's over. You're done. Well, almost.

You built a smart, measurable, and achievable action plan for your event. You executed your plan. Schedule in the follow-up to measure and record your event success.

Quickly do a post-mortem while the event is still fresh in your mind.

What should you stop, start, or improve about your strategy?

Create a shared document and have a meeting to get your team to contribute what worked well and where you can improve.

Know who will take the lead after you determine whether your leads are for marketing or sales.

**Tip:** Create a small survey to poll your personnel and get their feedback. Are there things you could do better? What did you get right? What should you replicate at the next conference you sponsor?

Go back to the beginning and the desired outcome you outlined in the first stages of your event planning.

Did you meet your goals for the event?

Were you able to achieve the desired outcome in terms of awareness, number of meetings, total number of leads, and total sales that you estimated?

Monitoring and analyzing your metrics will give you the data and insights to calculate success and return on your investment.

Make sure to close the loop and finish what you started. This is key to getting funded again next year.

Create an executive summary for your boss so he or she can share your success up the food chain while you track the connections that will lead to your next big sale.

We hope you achieve all of your goals and are extremely successful.

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Let us know if we can help you create a successful sponsorship at Social Media Marketing World. Email [emily@socialmediaexaminer.com](mailto:emily@socialmediaexaminer.com).

