SharpSpring

Level Up Your Event Management

Give clients the ROI they're looking for with these event strategies

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About the Author

As a certified consultant in HubSpot, Pardot and SharpSpring, Yusuf founded FunnelBud with the mission to help companies succeed with Marketing Automation and CRM. He now offers his digital marketing expertise to Swedish companies, helping them leverage effective and easy-to-use marketing automation and CRM solutions.

Today's best marketers use digital to promote and enhance the physical.

Did Digital Kill Physical?

Meeting the people you're considering doing business with is often necessary to establish the trust that's needed for successful partnerships. One of the most effective ways this happens is through meet-and-greet events where people get to connect and discuss their needs.

It might seem like the growth of digital communication is making physical meetings like these decrease in importance. But so far, we haven't seen this happening. Instead, today's best marketers use digital to promote and enhance the physical. The same type of rapport and trust that are formed at physical events can be also achieved through digital events such as webinars.

However, we couldn't find an event marketing tool that ties together the various components of managing events in an easy and streamlined way. But then we realized SharpSpring could do it all! In this article, we'll explain how one client hosts 60 events per year in five different locations (often simultaneously), has full control over

both registration and attendance, and manages pre- and post-event registrations. And all of this is done in under 10 minutes of preparation per event, using only SharpSpring.
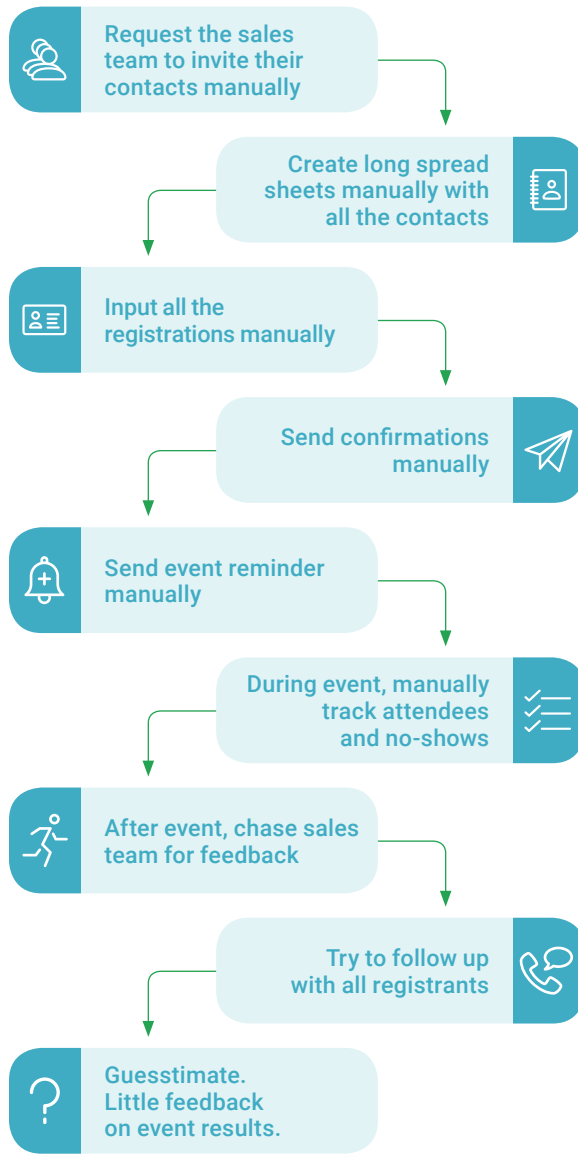
The Traditional Event Management Process

If you or your clients host events, the following challenges will probably resonate with you. We've seen them happen many times, and to this day, we continue to see them with our clients who haven't begun using SharpSpring yet.

If you don't have an automated way to manage events, you scramble to get various salespeople to invite their contacts to your event. Invitations are often sent by individual salespeople as a PDF attachment via Outlook, which means you have no way of ensuring that all of the important contacts have been invited. If a salesperson is away or busy, their contacts will probably not get the invitation.

Next, registrations are handled manually. People email you, and you add them to an Excel spreadsheet. You probably also send a confirmation manually. And if time allows, you may even send a reminder a couple of days before the event.

Somehow, your event does fill up, and it turns out to be a success! So,

Without an automated way to manage events, you have less control of the process, and it's much harder to track results.

The traditional, piecemeal approach to event management:

Request the sales team to invite their contacts manually

Create long spread sheets manually with all the contacts

Input all the registrations manually

Send confirmations manually

Send event reminder manually

During event, manually track attendees and no-shows

After event, chase sales team for feedback

Try to follow up with all registrants

Guesstimate. Little feedback on event results.

what do you do now? You requested a large budget to hold this event. Now it's up to you to show results.

Again, you'll unfortunately have to chase down the salespeople for some numbers. Did they make follow-up calls to the list of attendees you sent to them via that long Excel sheet? Perhaps they didn't bother because it was too messy. Or maybe you ended up having to create separate lists for each sales rep and then put them all together into your master sheet when you got them back. And despite your best efforts, maybe 20% of the attendees actually received follow-up calls. Ugh… what a nightmare.

So what do you show your boss? Probably the number of attendees and some generous assumptions based on the little feedback you did get back. And then, based on that, some guesstimates on how this contributed to sales.

Unfortunately, this way of doing things is not uncommon at all. We've even seen companies with sophisticated event management tools, or other marketing automation systems, handle their events this way. In some cases, certain parts of the process are automated. Perhaps Eventbrite handles your registrations and attendance. But what about the follow-up process? Maybe Pardot handles your pre- and post-event communication, but you have yet to seamlessly automate the event creation process. And recreating every pre- and post-event communication asset for each new
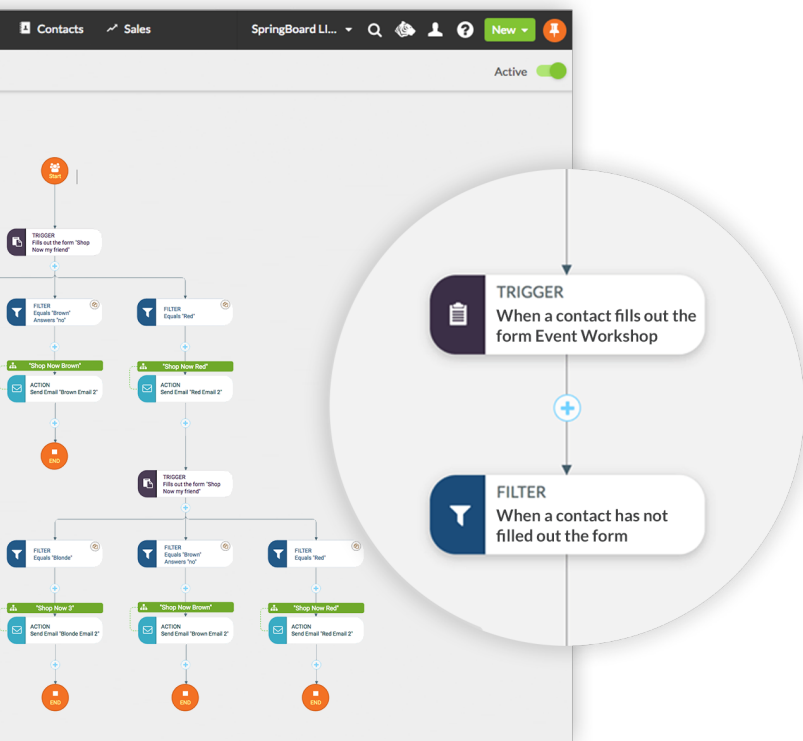
SharpSpring Visual Workflow Builder

SharpSpring's dynamic content features and visual workflows are huge time-savers when managing an event.

event actually takes longer than just asking your salespeople to send out emails themselves. This piecemeal approach to event management is highly inefficient, yet it's all too common.

The Importance of Seamlessness and Speed

Doing events the traditional way – with or without help from automation tools – is time-consuming and can diminish your results. We wanted to help our client streamline their event communication and follow-up processes. They needed a way to manage events more efficiently, a way to follow up afterwards so that sales could be made, and a way to report on how the events actually contributed to sales.

We were able to achieve this by building a single set of assets in SharpSpring, which the client then reuses each time they're going to host an event. SharpSpring's dynamic content features and Visual Workflows were huge time-savers for us and for our client. Rather than having to rebuild every asset for every event, the client simply edits some content in certain assets and modifies a date field in the Visual Workflow, and the rest handles itself. While the process around each event used to take two hours (sometimes more, if you account for all of the different people who were involved), it now takes the marketing coordinator less than 10 minutes of following a simple checklist in order to create an event.

The SharpSpring event process comprises all the features you would expect: pre-event invititations, reminders, cancellation and registration options, and follow-ups.

The event process comprises all of the standard features you would expect. Pre-event invitations to people who didn't yet register and automatic reminders before the event to people who did. Ability for people to cancel their registration, or to re-register if they change their minds. Also the ability to send different sets of follow-ups to those who attended vs. those who didn't register or those who registered but didn't show up.

Finally, one of the client's major time sinks was all of the calls their marketing coordinator would get from their five offices asking which leads had registered and who had attended. This could now be handled easily through SharpSpring lists, but the client didn't want to give access to team members who weren't normally involved with SharpSpring (or force them to constantly log in). They wanted to make it simple, secure and easy to manage for everybody.

In addition, they wanted to have an easy way to filter registrants, attendees and no-shows by location, event or date. To solve this, we built them a sync with an Event Tracker online spreadsheet. This spreadsheet is synced two ways with SharpSpring, which makes it suitable to use for event attendance tracking too. During the events, they simply open up the sheet and select "attended" or "no show" from a dropdown for each person who registered. This action then triggers the field to sync back to SharpSpring and automatically add the lead to the appropriate follow-up list.
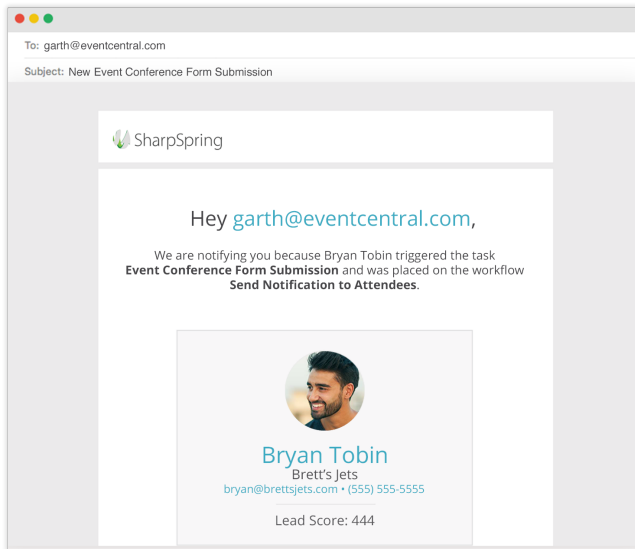
Lead Scoring

Sales Notifications

Lead scoring and sales notifications need to be part of the process both to detect hot leads and to "sell the call" to sales people.

The Connection to Sales

Ultimately, no matter how much positive feedback you get on your events, if they don't bring you more sales, they don't matter. But tracking sales contribution isn't enough – driving sales is also important. Not following up after events (or just hoping that salespeople will do it) is a no-go. Instead, you need to help your salespeople follow up by automating much of the process for them and giving them more value than "here's a bunch of leads who attended the event."

Of course, a post-event digital follow-up process can accomplish a large part of this. But it's not enough. Rather, lead scoring and sales notifications need to be part of the process both to detect hot leads from the event and to "sell the call" to the sales people.

Here's our recommended approach:

Do your post-event follow-up process like you always should. If you can, segment by attendance: non-registrants, attendees, and no-shows. But build into your process different ways for your participants to show buying intent. Rather than calling everybody who watches the follow-up sales presentation, send them a related case study with a trackable link. Choosing whether to open it is one way for leads to express their intent.
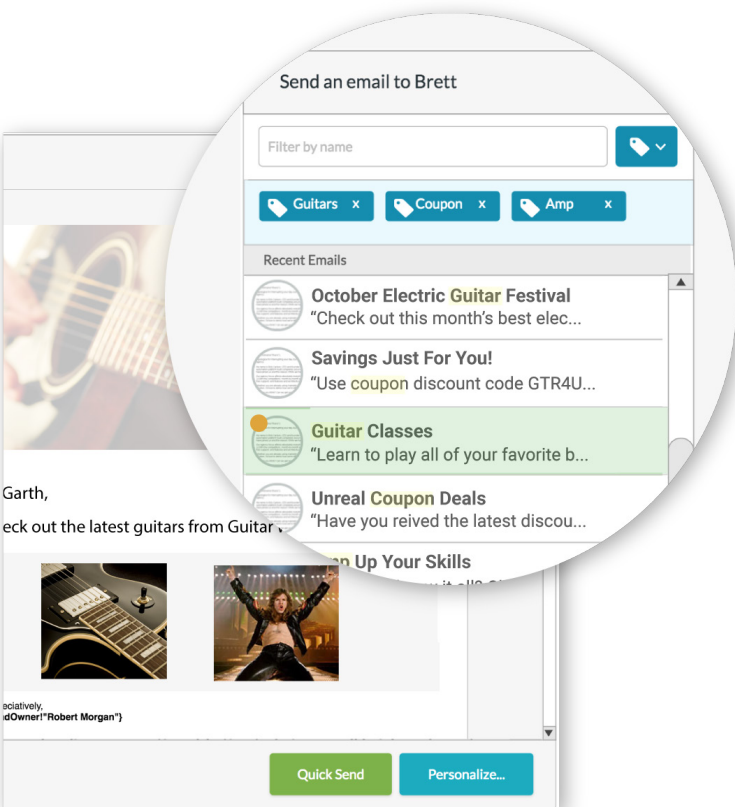
SharpSpring Smart Mails

Build smart mails in SharpSpring so your sales team can easily pick and choose which ones to send.

Or if your event was about a specific strategy or practice, you can be explicit in your follow-ups, asking leads how much progress they've made in implementing those practices you covered, and offering options like "Not Even Started," "We're Looking Into It," and "We Already Got It and Are Super Happy."

These types of follow-ups accomplish two things simultaneously: They provide value for your leads while showing you their buying intent. One reason salespeople don't call event leads is that (believe it or not) they're often not valuable! Many event-goers are not in the process of buying, so calling every single one of them is not only a waste of time for your team, but also for the people you're calling. However, if someone downloads a case study related to the topic of the event or clicks the "We're Looking Into It" option, they will likely be happy to take that call and discuss further.

Finally, provide an easy way for your salespeople to follow up. Don't just send them a notification reminding them to call. Instead, build some smart emails in SharpSpring that cover various scenarios, so your sales team can easily pick and choose which ones to send. Create one email that provides more details about your product or service. Create another one for how you helped another customer in the same industry. And another asking if they're interested in setting up some time to chat

more. Don't force your salespeople to reinvent the wheel each time they reach out to leads. Prepare some reusable, personalized emails for them – and try to make them as "non-markety" as possible. This will help your sales team save time while getting more of what they want – meetings with engaged prospects.

Physical Is Alive and Kicking – and Digital Is Here to Help

Events are, and will probably remain, one of the most effective ways to build personal relationships with potential business partners. When big decisions loom, trust is important, and one of the best ways to build trust is to meet with the person you're going to do business with.

And with today's digital tools, you can ensure that the physical meeting experience is augmented by digital processes that facilitate your events, help you manage them, and enable you to communicate more effectively. Most of all, these tools connect the events to your larger sales process, ensuring that the time you spend creating and hosting these events isn't wasted.

And while we've focused on physical events in this article, digital events can benefit from the same process too – maybe even more so, because you can reach people in locations that otherwise would prohibit them from building these important connections.

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Want to read more on topics like this?

Check out our other
Agency Perspectives articles.

Building an entire event management process like this in SharpSpring actually takes less time than executing just one or two events in the traditional way. So if you're hosting anything more than two events per year, we'd encourage you to take on a similar approach to ours and build out your process in SharpSpring. This will help you save time in the short and long terms, and it'll help you optimize the results of all of your events.

See how adding marketing automation to your agency's services can drive revenue from existing clients and help you add new ones. Schedule a demo with a partnerships specialist to chat about your specific needs.

Get a Demo

SharpSpring

SharpSpring is the marketing automation platform of choice for more than 1,500 digital marketing agencies and their 6,000+ clients. Since 2014, SharpSpring has provided its powerful marketing automation solution to businesses around the globe. In the short time since its inception, the company has gained significant market share from industry leaders with its competitive pricing, agency-focused business model, and robust platform.

Visit www.sharpspring.com for more information.

funnelbud

FunnelBud is a SharpSpring partner agency who's mission is to help companies succeed with Marketing Automation and CRM implementations. To that end, FunnelBud includes full and ongoing implementation, training and consultation services with its marketing automation offerings. To date, FunnelBud has helped over 30 companies migrate from more complicated and more expensive solutions to SharpSpring and get more value for their investments.

Visit www.funnelbud.com for more information.