Pre-Event Lifecycle: From Planning to Performance

Stage 1: Set Event Objectives

- Define clear goals for the event (e.g., networking, lead generation, partnerships, increased brand visibility).
- Identify key targets and desired outcomes (priority partners, prospects, customers).
- Establish measurable success metrics for team tracking.

Stage 2: Team Alignment & Role Assignment

- Appoint the team members responsible for attending and representing your company.
- Assign specific roles:
    - Lead collector
    - Demo specialist
    - Networker
    - Data manager
- Conduct a team kickoff meeting to clarify responsibilities and expectations.

Stage 3: Attendee List & Early Outreach

- Obtain attendee and exhibitor lists from event organizers.
- Segment contacts into priority categories (hot, warm, general).
- Reach out to key prospects before the event with personalized messages:
    - “We’ll be at [event name], let’s catch up!”
    - Suggest specific times/locations to meet.

Stage 4: Meeting Scheduling & CRM Preparation

- Pre-book meetings, coffee catch-ups, or demo slots with priority contacts.
- Prepare CRM or lead capture templates for use during the event.

Stage 5: Collateral & Logistics Preparation

- Confirm and prepare marketing materials:
    - Brochures
    - Business cards
    - Branded swag/giveaways
    - Demo stations
- Finalize all logistical details:
    - Travel and accommodation
    - Booth allocation and setup
    - Tech/AV needs

Stage 6: Team Briefing & Mock Run

- Conduct a detailed team briefing covering:
    - Event agenda
    - Target outcomes
    - Key talking points
- Run mock sessions for networking and demos.
- Verify everyone can access and use lead capture forms.

Stage 7: Social & Internal Promotion

- Announce your participation across company website and social media channels.
- Notify existing accounts and prospects that your team will be present.
- Set up an internal communications group/chat for live updates during the event.

Stage 8: Final Checklist & Go-Live

- Review all readiness steps and assign final owners.
- Double-check materials, registration info, and attendee lists.
- Arrive early on event day for setup and to connect with prospects.

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