

# Small Event - System eComm Checklist <sup>[1]</sup>

## Small Event - System eComm Checklist

Download this checklist (scroll to bottom) if you are building and sending an eComm Marketing Cloud Evite (event invitation) AND building a Cvent event registration form. Kate's role is to provide an audience report (or list) and review, integrate and activate/"approve" your Cvent event.

STEPS	TIME FRAME	TASK
		EVENT DATE
1 EVENT DATE	8 weeks	<div>Work backwards from this date - all tasks are strategically slated to lead up to the event date.  <i>This is a fictitious example</i> <b>EVENT NAME:</b> CU at the Zoo <b>EVENT DATE:</b> October 1</div>

## STEPS

## TIME FRAME

## TASK

### DEFINE EVENT GOAL & OBJECTIVE(S)

What are you trying to accomplish with your event?

*This is a fictitious example*

**GOAL:** Increase moral among CU employees

**OBJECTIVE 1:** Employees are grateful to the President for holding the event for them and their families

**OBJECTIVE 2:** Employees have fun!

**OBJECTIVE 3:** Employees enjoy their system colleagues outside of work

*Add more as needed...*

### IDENTIFY ROLES AND RESPONSIBILITIES

Who does what to support the goal and objectives for this event?

*This is a fictitious example*

**ROLE 1:** Event manager

**ROLE 1 RESPONSIBILITIES:** Manages all aspects of event. Manager executes on the majority of the event logistical tasks, including budget. Ensures all tasks are completed.

**ROLE 2:** Unit's electronic communications manager

**ROLE 2 RESPONSIBILITIES:** Develops email communications in Marketing Cloud and event registration and post-registration communications in Cvent. Works with event manager for review and approvals.

**ROLE 3:** Graphic Designer

**ROLE 3 RESPONSIBILITIES:** Develops all graphic assets that will be used in emails, event registration, website, social media, signage, etc.

**ROLE 4:** Student worker

**ROLE 4 RESPONSIBILITIES:** Prints nametags, attendee lists, prepares centerpieces, SWAG, etc.

2  
EVENT  
DETAILS

8 weeks

## STEPS

## TIME FRAME

## TASK

IDENTIFY GOAL, MESSAGE, AUDIENCE & DESIRED ACTION FOR YOUR  
EMAIL INVITATION(S)

### 3 STRATEGIZE FOR EVITE

7 weeks

*This is a fictitious example*

**OBJECTIVE:** Invitees to register for the CU at the Zoo event

**MESSAGE:** CU President Bruce and Marcy Benson invite you to CU at the Zoo on October 1

**AUDIENCE:** CU system employees

**ACTION:** Register for event

*NOTE: See more on audiences below...*

## IDENTIFY YOUR AUDIENCE

### 4 AUDIENCE

7 weeks

Sending everything to everyone is not the best way to increase engagement and overall goodwill with CU constituents. This practice could lead to global unsubscribe activities, which affect all CU communications, including any future communications you send.

***Who would be most interested in your Evite?***

## OTHER AUDIENCE DETAILS

If you have a list of individuals who need to receive your communication and who are not in a CU source system, prepare a spreadsheet and include as many details as possible.

**STEPS****TIME  
FRAME****TASK****SET EVITE SEND DATE(S)**

5  
EVITE SEND  
DATE(S)

7 weeks

Starting with your event date(s), you should work backwards from there. For example, if your event is on Oct. 1, your first invitation should be sent at least 6 weeks in advance.

Considerations:

- If you want to send reminder emails (eg; "Don't forget to register!") , identify those send dates at this time as well.
- Reminder emails should EXCLUDE those who have already registered.
- We recommend about a week in between sends.
- When do you want to close registration? Keep that date in mind when you identify your last reminder email send date.
- These communications must be sent from Marketing Cloud to ensure compliance with CAN-SPAM legislation.

*This is a fictitious example (based in 2016 calendar)*

**SEND DATE 1:** Week of August 29 (~ 5 weeks before event)

**SEND 1 AUDIENCE:** CU System employees

**SEND DATE 2:** Week of September 12 (~3 weeks before event)

**SEND 2 AUDIENCE:** CU System employees who have NOT registered

**SEND DATE 3:** Week of September 19 (~2 weeks before event)?

**SEND 3 AUDIENCE:** CU System employees who have NOT registered

## STEPS

## TIME FRAME

## TASK

### IDENTIFY COMMUNICATIONS TO REGISTERED ATTENDEES

6  
COMMS TO  
ATTENDEES

7 weeks

Once your invitees have registered for your event, you want to continue communications with them. Here's some ideas for post-registration communications.

- **Registration Confirmation Email** - This is sent immediately after your invitee registers (or modifies) via your Cvent form.
- **Pre-event Email** - This is sent the day before the event with event details such as parking, event hours and other important information the attendee should know.
- **Post-event Email** - This is sent the day after the event and may include a link to a survey and/or contact information if the attendee needs to talk to someone.

#### Considerations:

- These communications can be sent from Cvent. Under CAN-SPAM, they are considered "Transactional" and do not require an unsubscribe link. They can only be sent via Cvent to REGISTERED ATTENDEES.
- Post registration/transactional emails can be set-up in Cvent to be sent automatically when someone registers or scheduled in advance.

## STEPS

## TIME FRAME

## TASK

### IDENTIFY WHAT YOU NEED TO COLLECT IN REGISTRATION

7  
FORM  
COMPONENTS

7 weeks

When your invitee registers for your event, what do you need to collect? At a minimum, you need to collect:

- First Name
- Last Name
- Email Address
- Credit card fields (eg; billing address fields) if a paid event

*Think about the event itself. Do you have a menu where the attendee needs to select a meal option? Maybe you're selling t-shirts and you need your attendee to identify their shirt size. Campus Affiliation is a commonly available field and can be used for name tags at the event. There are a myriad of event item options to add to your Cvent event registration form. This is the time to gather the field list so you are ready to efficiently build your registration form in Step 11.*

### IDENTIFY OTHER PROMOTIONAL MATERIAL

8  
OTHER PROMO

7 weeks

What about snail mail invitations, advertisements, brochures, signage, posters, social media, etc.? Now's the time to identify these items.

Considerations:

- These could impact your budget. Be sure to account for them in step 2.
- Make sure you talk with vendors who may be responsible for printing, mailing, etc. and identify associated costs, deadlines and requirements.
- Good news! Social media is already built into Cvent. You'll address this in Step 11.

STEPS	TIME FRAME	TASK
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#### CAPITALIZE ON EXISTING CHANNELS

9  
EXISTING  
CHANNELS

6 weeks

No need to reinvent the wheel. Check out existing campus communication channels <sup>[2]</sup> (eg; *1800 Grant elevator calendar*). If any are being sent to your desired audience, request to have your topic included in their next issue. This will broaden your reach and increase registrations.

#### SUBMIT LIST REQUEST

10  
SUBMIT

6 weeks

Kate <sup>[3]</sup> will develop your audience list(s).  
***Don't forget about reminder and follow-up email lists.  
Submit your request for those lists now as well!***

Submit List Request <sup>[4]</sup>

## STEPS

## TIME FRAME

## TASK

### WRITE OR ACQUIRE CONTENT FOR EVITE

1. Your Evite should be short, showcase event details (see list below) and prominently provide a button that links to a Cvent registration form.

- What
- Where
- When
- Cost
- Contact info

2. Write a compelling subject line

3. Write a preheader (for mobile devices). [Learn more about pre-headers.](#) <sup>[5]</sup>

### COLLECT ASSETS

eComm already has CU branded headers and buttons (eg; register, donate, etc.), but if you would like to include additional or other assets, such as a photo or special graphic, you'll need to acquire these assets. All images should be no larger than 600 px wide. [Learn more about image sizes.](#) <sup>[6]</sup>

#### Consideration

Make sure your images are brand compliant. [Learn more about CU brand requirements.](#) <sup>[7]</sup>

11  
CONTENT

6 weeks

### BUILD CVENT REGISTRATION FORM & POST-REGISTRATION COMMUNICATIONS

Go back to Steps 6 and 7 and reference your field list (step 7) and post-registration communications (step 6) to build your Cvent registration form.

#### Considerations:

- Use the same image assets as what you will



**STEPS****TIME  
FRAME****TASK****EVENT LOGISTICS | ROUND 1**

12  
EVENT  
LOGISTICS  
ROUND 1

6 weeks

- Secure site
- Secure speaker/entertainment
- Start preparing menus
- Design event venue layout
- Determine meeting format
- Forward contract to Procurement Service Center
- Approve promotional materials
- Secure travel arrangements if needed
- Arrange AV at venue
- Order food, beverage and AV

**EVENT LOGISTICS | ROUND 2**

13  
EVENT  
LOGISTICS  
ROUND 2

5 weeks

- Print material and send out/place ads/put up flyers
- Secure sleeping rooms if needed

STEPS	TIME FRAME	TASK
REVIEW		
14 REVIEW	5 weeks	<ul style="list-style-type: none"> <li>• Review audience list and send classification (if relevant) with your campus eComm specialist. Ask other questions as needed.</li> <li>• Review email content with your internal stakeholders and/or approvers (eg; your boss). Have your team check spelling, links (should link to Cvent registration form that built in step 11), graphics, subject line AND pre-header. Send them a test email in Marketing Cloud.</li> <li>• Have your internal team set up as test users in Cvent so they can test the Cvent event registration form.</li> <li>• Obtain approval from internal team</li> </ul>
SEND REQUEST FOR EVENT ACTIVATION		
15 EVENT ACTIVATION	5 weeks	<p>In Cvent, <u>send for approval</u> <sup>[9]</sup> to <u>Kate</u> <sup>[10]</sup>.  <b><i>Kate needs a week to complete this task.</i></b>  <b><i>This includes form review, accounting sign-off (if a paid event), Salesforce integration and activation.</i></b></p> <p><u>Learn how to send for approval</u> <sup>[9]</sup></p>
16 SEND EVITE	4 weeks	<b><i>Send Evite and celebrate!</i></b>
EVENT LOGISTICS   ROUND 3		
17 EVENT LOGISTICS ROUND 3	4 weeks	<ul style="list-style-type: none"> <li>• Buy name badges/gifts/memorabilia</li> <li>• Order flowers/décor</li> </ul>

STEPS	TIME FRAME	TASK
EVENT LOGISTICS   ROUND 4		
18 EVENT LOGISTICS ROUND 4	3 weeks	<ul style="list-style-type: none"> <li>• Buy name badges/gifts/memorabilia</li> <li>• Order flowers/décor</li> </ul>
19 SEND REMINDER 1	3 weeks	<b><i>Send reminder Evite to those who have not registered. Celebrate!</i></b>
EVENT LOGISTICS   ROUND 5		
20 EVENT LOGISTICS ROUND 5	2 weeks	<ul style="list-style-type: none"> <li>• Confirm participants (pull attendee reports in Cvent)</li> <li>• Finalize order for food, beverage and AV</li> <li>• Create signage</li> </ul>
21 SEND REMINDER 2	2 week	<b><i>Send FINAL reminder Evite to those who have not registered. Celebrate!</i></b>
EVENT LOGISTICS   ROUND 6		
22 EVENT LOGISTICS ROUND 6	1 week	<ul style="list-style-type: none"> <li>• Gather all materials and ship to site if not local</li> <li>• Send final guarantees to venue/caterer</li> <li>• Print nametags</li> </ul>

**STEPS****TIME  
FRAME****TASK****EVENT LOGISTICS | ROUND 7**

23  
EVENT  
LOGISTICS  
ROUND 7

Day  
before  
event

- Print final guest lists
- Print any additional name tags
- Final check of materials and supplies if not present
- Send pre-event communication to registered attendees

**EVENT LOGISTICS | ROUND 8**

24  
EVENT  
LOGISTICS  
ROUND 8

Day of  
event

- If there are changes to list, reprint registration list

**ANALYZE EVENT**

25  
ANALYZE

Day after  
to  
1 week  
after  
event

- Recap with staff the good things and the challenges
- Request final invoices from caterer/venue
- Send thank you notes/gifts to speakers

**ANALYZE DATA**

- Review open, click-through and unsubscribe rates in Marketing Cloud
- Modify future communications (eg; reminders) accordingly
- Are you planning to send a reminder? Make sure you submitted a list request. cor

## **Download the Checklist**

[11]

### **Do you have something to add?**

**Send a note to Kate.** [12]

#### **Groups audience:**

eComm

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**Source URL:**<https://www.cu.edu/ecommerce/small-event-system-ecommerce-checklist>

#### **Links**

[1] <https://www.cu.edu/ecommerce/small-event-system-ecommerce-checklist> [2]

<https://www.cu.edu/ecommerce/campus-resources>

[3] <mailto:kate.oconnell@cu.edu?subject=Small%20System%20Event%20%7C%20Audience%20Request>

[4] <https://www.cu.edu/ecommerce/forms/request-new-report> [5] [https://www.cu.edu/blog/ecommerce-wiki/using-](https://www.cu.edu/blog/ecommerce-wiki/using-preheader)

[preheader](https://www.cu.edu/blog/ecommerce-wiki/using-preheader) [6] <https://www.cu.edu/blog/ecommerce-wiki/image-sizes> [7] [https://www.cu.edu/brand-and-identity-](https://www.cu.edu/brand-and-identity-guidelines)

[guidelines](https://www.cu.edu/brand-and-identity-guidelines) [8] <https://www.cu.edu/ecommerce/ecommerce-users/training> [9] [https://www.cu.edu/blog/ecommerce-](https://www.cu.edu/blog/ecommerce-wiki/cvent-event-approval-launch)

[wiki/cvent-event-approval-launch](https://www.cu.edu/blog/ecommerce-wiki/cvent-event-approval-launch)

[10] <mailto:kate.oconnell@cu.edu?subject=Small%20System%20Event%20%7C%20Event%20Approval>

[11] [https://www.cu.edu/sites/default/files/pages/80901-event-ecommerce-checklist/docs/small-event-ecommerce-](https://www.cu.edu/sites/default/files/pages/80901-event-ecommerce-checklist/docs/small-event-ecommerce-checklist.pdf)

[checklist.pdf](https://www.cu.edu/sites/default/files/pages/80901-event-ecommerce-checklist/docs/small-event-ecommerce-checklist.pdf) [12] <mailto:kate.oconnell@cu.edu?subject=About%20an%20eCommerce%20checklist...>