

# Small Event - eComm Checklist

STEPS	TIME FRAME	TASK
1 EVENT DATE	8 weeks	<b>EVENT DATE</b> Work backwards from this date - all tasks are strategically slated to lead up to the event date. <i>This is a fictitious example</i> EVENT NAME: _____ EVENT DATE: _____
	Notes	
2 EVENT DETAILS	8 weeks	<b>DEFINE EVENT GOAL &amp; OBJECTIVE(S)</b> What are you trying to accomplish with your event? <i>This is a fictitious example</i> GOAL: _____  OBJECTIVE 1: _____  OBJECTIVE 2: _____  OBJECTIVE 3: _____  <i>Add more as needed...</i>
		<b>IDENTIFY ROLES AND RESPONSIBILITIES</b> Who does what to support the goal and objectives for this event? <i>This is a fictitious example</i> ROLE 1: Event manager  ROLE 1 RESPONSIBILITIES: _____  ROLE 2: Unit's electronic communications manager  ROLE 2 RESPONSIBILITIES: _____  ROLE 3: Graphic Designer  ROLE 3 RESPONSIBILITIES: _____  ROLE 4: Student worker  ROLE 4 RESPONSIBILITIES: _____
		<b>CREATE BUDGET</b>

What is your event going to cost? What are all associated expenses and how much will you charge people to attend your event?

EXPENSES	INCOME/COST OFFSETS
Venue rental	Ticket prices
Speakers	Other...
Catering	
Travel (hotel, transportation, per diem, etc.)	
Linens	
Flowers	
Giveaways/Gifts	
Other...	

Notes

3  
STRATEGIZE FOR EVITE

7 weeks

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

OBJECTIVE: \_\_\_\_\_

MESSAGE: \_\_\_\_\_

AUDIENCE: \_\_\_\_\_

ACTION: \_\_\_\_\_

*NOTE: See more on audiences below..*

Notes

4  
AUDIENCE

7 weeks

IDENTIFY YOUR AUDIENCE

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.

Notes

5  
EVITE SEND DATE(S)

7 weeks

### SET EVITE SEND DATE(S)

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: \_\_\_\_\_

SEND 1 AUDIENCE: \_\_\_\_\_

SEND DATE 2: \_\_\_\_\_

SEND 2 AUDIENCE: \_\_\_\_\_

SEND DATE 3: \_\_\_\_\_

SEND 3 AUDIENCE: \_\_\_\_\_

Notes

6  
COMMS TO ATTENDEES

7 weeks

### IDENTIFY COMMUNICATIONS TO REGISTERED ATTENDEES

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.

Notes

## 7 FORM COMPONENTS

7 weeks

### IDENTIFY WHAT YOU NEED TO COLLECT IN REGISTRATION

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*

Notes

## 8 OTHER PROMO

7 weeks

### IDENTIFY OTHER PROMOTIONAL MATERIAL

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.

Notes

## 9 EXISTING CHANNELS

6 weeks

### CAPITALIZE ON EXISTING CHANNELS

No need to reinvent the wheel. Check out existing campus communication channels (eg; CU Boulder Today). 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.

Notes

10  
SUBMIT

6 weeks

## SUBMIT LIST REQUEST

*Your campus eComm specialist 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!*

11  
CONTENT

6 weeks

## 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): \_\_\_\_\_

## 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.

### Consideration

Make sure your images are brand compliant. Learn more about CU brand requirements.

## 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 include in your Marketing Cloud Evite. This creates consistency for your invitees and it helps brand your event.

Do you want your invitees to promote your event on their social media channels on your behalf? You can set this up in Cvent.

Check out our training page if you're new to eComm or if you want to browse our eComm Wiki for details on specific topics.

## DEVELOP OTHER PROMOTIONAL MATERIALS

Go back to Step 8 and create and organize the other promotional items you identified.

Considerations

Make sure your images are brand compliant. Learn more about CU brand requirements.

Get another set of eyes on whatever you created. Check for spelling, URLs, grammar, etc.

Notes

12  
EVENT LOGISTICS  
ROUND 1

6 weeks

EVENT LOGISTICS | ROUND 1

- 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

Notes

13  
EVENT LOGISTICS  
ROUND 2

5 weeks

EVENT LOGISTICS | ROUND 2

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

Notes

14  
REVIEW

5 weeks

REVIEW

Review audience list and send classification (if relevant) with your campus eComm specialist. Ask other questions as needed.

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.

Have your internal team set up as test users in Cvent so they can test the Cvent event registration form.

Obtain approval from internal team

Notes

15  
EVENT ACTIVATION

5 weeks

SEND REQUEST FOR EVENT ACTIVATION

*In Cvent, send for approval to your campus eComm specialist.*

*Your specialist needs a week to complete this task.*

*This includes form review, accounting sign-off (if a paid event),  
Salesforce integration and activation.*

16  
SEND EVITE

4 weeks

*Send Evite and celebrate!*

Notes

17  
EVENT LOGISTICS  
ROUND 3

4 weeks

EVENT LOGISTICS | ROUND 3

Buy name badges/gifts/memorabilia

Order flowers/décor

Notes

18  
EVENT LOGISTICS  
ROUND 4

3 weeks

EVENT LOGISTICS | ROUND 4

Buy name badges/gifts/memorabilia

Order flowers/décor

Notes

19  
SEND REMINDER 2

3 weeks

*Send reminder Evite to those who have not  
registered. Celebrate!*

Notes

20  
EVENT LOGISTICS  
ROUND 5

2 weeks

EVENT LOGISTICS | ROUND 5

Confirm participants (pull attendee reports in Cvent)

Finalize order for food, beverage and AV

Create signage

Notes

21  
SEND REMINDER 2

2 weeks

*Send FINAL reminder Evite to those who have not  
registered. Celebrate!*

Notes

22  
EVENT LOGISTICS  
ROUND 6

1 week

EVENT LOGISTICS | ROUND 6

Gather all materials and ship to site if not local

Send final guarantees to venue/caterer

Print nametags

Notes

23  
EVENT LOGISTICS  
ROUND 7

Day before event

#### EVENT LOGISTICS | ROUND 7

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

Notes

24  
EVENT LOGISTICS  
ROUND 8

Day of event

#### EVENT LOGISTICS | ROUND 8

If there are changes to list, reprint registration list

Notes

25  
ANALYZE

Day after to  
1 week after event

#### ANALYZE 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

Notes