

2022 Conferences

BY TESLA CADENA

Let's Discuss

- 01 Why Marketing is Coordinating
- 02 Defining Marketing Leads
- 03 Conference Checklists
- 04 Write Walk Through
- 05 Simplified Process
- 06 Your Questions
- 07 Resources

The Logic Behind It

Structured Planning

- Central information hub
- A uniform process
- Transparent operations

Strategic Decisions

- Assessing opportunities
- Creating strategies
- Using sales' knowledge

Lead Generation

- Improved Collateral
- Increased interest
- Additional leads

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Marketing Leads Are:

People who shows interest in our brand's products or services due to the marketing team's content.



Phone calls to the main line



Emails to generic PE Solutions line



Resource-related form fills and downloads (Schedule a Demo, Webinars, Deminars, eBooks,



Conference and tradeshow prospects



References

Marketing Conference Checklist

01



02



03



04



05

THREE MONTHS PRIOR

Research conference to decide the budget, sponsorships, and booth designs

Ensure membership and track benefits

Register teammates for events and fill out necessary forms

Update the conference web page and calendar

TWO WEEKS PRIOR

Gather shipping details and pack swag

Create collateral and send to reps

Create a heads-up email

ONE DAY PRIOR

Social media post about who will be there and if we're sponsoring

DAY OF EVENT

Share teammate's social media post

Send reminder email about feedback

ONE WEEK AFTER

Determine if follow-up email is required (usually unnecessary)

Reconcile estimated and actual budgets

Marketing Roles

Tesla

- Manage pre and post social media posts
- Manage pre and post campaign emails
- Ship booths and swag items

Patrick

- Create collateral for the events
- Create visuals for the campaign emails and SM posts

Alessandra

- Ship booths and swag items
- Edit and proof-read campaign emails

Malaika

- Review all final materials, strategies, decisions
- Create estimated and reconciled budgets

Sales Conference Checklist

01 

PRE-CONFERENCE

Create your own travel arrangements three months out

Provide the address for shipping as soon as your travel is booked via [spreadsheet](#)

Inform the marketing team of any memberships you have with SNAs

02 

MID-CONFERENCE

Post on social media with a photo of yourself and your booth. Follow these [guidelines](#), and tag PrimeroEdge and use #PrimeroEdge

Jot down anything interesting about the conference, and engage with attendees so you have [feedback](#) at the end of the show

03 

POST CONFERENCE

No later than two days after the conference, provide Tesla with the feedback previously discussed

Create a field in SF to track the source of lead

Update this sheet with your travel costs so we can reconcile the [budget](#)

HALFWAY MARK

QUESTIONS?

Wrike Walk through

Project Management

[Start here](#) to view all of the conferences for the upcoming year and associated tasks.

Calendar View

[View conferences](#) and color-coded associated tasks by either status or who is in charge of the task.

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Simplified Process



Track Your Tasks in Wrike

Wrike is apart of everything marketing does, and we appreciate your effort in learning this tool.



Fill Out Your Shipping Needs

Seamlessly tracking and shipping items will provide peace of mind and help conferences run smoothly.



Provide Feedback Ask Questions

This is new for marketing as well as sales, so do not be afraid of over communicating.

**FINAL
QUESTIONS?**

Resource Page

Reference these links should you need to find anything.

Conference Projects and Checklists in Wrike:

<https://www.wrike.com/workspace.htm?acc=1823526#path=folder&id=806743419&c=list&vid=-1&p=798168533&a=1823526&so=11&bso=1&sd=0&f=&st=space-780528148>

Conference Calendar in Calendar View:

<https://www.wrike.com/workspace.htm?acc=1823526#/single-calendar/?id=1370818&spaceId=780528148>

Swag and Booth Shipping:

<https://docs.google.com/spreadsheets/d/1gQqAKYXKUmnudQ7TqWwHMUQaqEvf8oh2WRFIcwBmEk/edit?usp=sharing>

Sales Team's Flyers:

<https://drive.google.com/drive/folders/1yfA6nq1ISGdJ1a4cpnOcjJjwD2uiECu?usp=sharing>

Social Media Guidelines:

<https://docs.google.com/document/d/1-NzmFb4YoFPS2HBm0vO-nYvGc9IQEnuStZmUMCsuDwc/edit>

Membership, Sponsorship, and Budget Info:

<https://docs.google.com/spreadsheets/d/13gHQr3amOGQt9JurUc0LypwKD-wHyyT2Sb4fwGgKClk/edit#gid=0>