

In-Person Events Training Deck

Revenue Team!

AGENDA

Today we will cover...

- Why do we go to Events?
- Types of Events
- Event Process
- Events Goal Setting
- How am I selected for an event?
- Before the Event
- During the Event
- After the Event
- Upcoming events

Why do we go to Events?

1. Open qualified opportunities

- Opening qualified opportunities is our highest priority objective at most events

2. Build awareness and interest

3. Foster relationships

4. Gather intelligence

Types of In Person Events

- **Marquee**

- Large sponsorship
- 4+ AEs, Sales Leaders, AMF, Marketing, Services, etc
- Large spend, high visibility
- 3+ Marquee marketing led events/year - Prosper Show, Let's Grow, Amazon Accelerate, unBoxed

- **Marketing-Led**

- Typically 200 or more target registrants
- 2 AEs, possibly Marketing representation
- Some sort of sponsorship is in play - booth, speaking engagement, meeting block, etc
- 4+ Marketing Led events/year - Cannes Lion, Prosper+, eTail Boston, GroceryShop

- **Boots-On-The-Ground (BOG)**

- Category-specific exhibitions where exhibitors are our ICP
- Marketing will flag several events throughout the year in the Housewares, Apparel, Health & Beauty categories for Sales to consider
- Marketing pulls list of exhibitors - matches against DB, enriches new-to-DB company data, and creates the SFDC campaign for AEs to book meetings prior to the event, and can set up happy hours/dinners

Events Process

1. Identify & research events
2. Decide on goals & Teika team attendees
3. Pre-event kickoff meeting
4. Order booth, swag, sponsorship, demo, etc (if applicable)
5. Book travel and lodgings
6. Sales outreach from lead list
7. Attend event
8. Post event follow up meeting

This process will:

- Be efficient
- Be easily repeatable
- Ensure ROI & success



Event Goals Setting

- Each event is weighed on the expected revenue it can bring in, based on size, target ICP, and past performance
- Expected revenue is used to set goals and determine number of AEs attending
- Goals will be revisited once the event is done and we're evaluating next year

Reach:							
Registrations		2,000			\$0	\$0	\$0
Total Target Attendies (SFDC)	-	1,700	1500	Sponsorship, speaking, presentati	\$5	\$8,500	\$7,500
Target Total Accounts in Attendance	30.0%	510	100		-		
Interactions/Engagements (SFDC)	25%	128	400	Booth visits, meetings, dinner, den	\$25	\$3,188	\$10,000
Net new:							
New Contacts to DB	-		513	Not used in calculations	-	-	-
MQLs	-		322	Not used in calculations	-	-	-
Net New Meetings (accounts) (SQLs) (\$	5%	26	77	Mtgs booked attributable to event	\$2,445	\$62,355	\$188,287
Opportunities Created (SFDC)	34%	9	61	Meetings Held	\$7,192	\$62,355	\$438,712
Closed Won (SFDC)	31%	3		Opps created within 12 months tie	\$23,200	\$62,355	\$0
\$ Pipe Opened (MRR)	\$2,900	\$25,143	\$149,788	From Opportunities Created	2.48	\$62,355	\$371,473
\$ Pipe Closed	31%	\$7,794		From Closed Won	\$8.00	\$62,355	\$0
\$ LTV	8	\$62,355		Assuming an LTV of 8 months	\$1	\$62,355	\$0
Existing:							
Opps. Engaged (anecdotal)	50%		5	-	\$23,200	\$0	\$116,000
Existing Customers Enriched (anecdotal)	75%		3	-	\$23,200	\$0	\$69,600
Impact:							
Partner Relations (new & enhancing exi	-		10	-	\$500	\$0	\$5,000
Press Pickup (online or video)	-		1	-	\$500	\$0	\$500
On Stage Product Demo (one to many)	-		0	-	\$2,500	\$0	\$0
Non-Demo Speaking Opportunity (thou	-		1	-	\$2,500	\$0	\$2,500
Cost & ROI:							
Marketing Spend	-	\$254,000	\$224,408.41				
Sales Folks Attending	-		13				
Event Days	-		3				
Cost of AEs	\$320.00	\$0	12480				
Spend + AE Cost		\$254,000	\$236,888				

Who Goes To An Event?

The more boxes you check here, the more likely you are be approved to attend a given event:

- ☐ Is it in your territory? (starting Jan 1)
- ☐ Is it a large event?
- ☐ Have I rocked an event in the past?
- ☐ Is it in the budget?
 - ☐ Marketing budget **OR** Sales travel and expenses (depending on the tier of event)

NOTE: *If you want to go to an event that isn't on the list yet, and obtain approval based on the criteria above, you can go to any event you want.*

- ☐ Do you have Jason or Chris's approval for BOG events?
- ☐ Do you have Liz's approval for Marketing-Led events?
- ☐ Do you have meetings booked ahead of the event?

Before the Event

Marketing Leaders, Sales Leaders, and selected AEs attend a kickoff 28 days ahead of time (when possible)

- Liz, Madeline, Magee, Gika, Jeff (Optional), Mike (Optional), Ben (Optional), AEs (if known)
- Details of the event will be reviewed, as well as any unusual details. Kickoffs will be recorded.

Sales Leaders own sequence messaging - Marketing will suggest content during kickoff

- AEs will be routed an enriched list of attendees before the event.
- **Groove sequence** **multiple** touches over **2** weeks prior to event via phone, email, and LinkedIn InMail
- **Goal:** Book meetings at the event - each event will have a meeting goal - communicated during kickoff

Book Your Own Travel & Lodging

- Book your own travel - unless communicated otherwise, Madeline will book your hotel - **SOMETIMES YOU WILL NEED TO BOOK TRAVEL BEFORE THE KICKOFF**
- Keep track of all receipts and submit to Expensify for approval and reimbursement
- Share any unexpected expenses with Marketing for reporting purposes
- Dress professionally - Teika t-shirt at Marketing Led and Marquee events, business casual at BOG

During the Event

Your goal is to book meetings with qualified leads

- Book the meeting or send the email WHILE TALKING to the person. They WILL forget you after the event.
- Be conversational and ask questions. 90% asking questions (discovery/data collection) & 10% pitching
- Keep dinners/happy hours/coffees in your back pocket and use when appropriate

Use the new Hubspot Landing page to book meetings

- Choose your name from the dropdown and fill out the form for each contact
- If it's a new contact, it will be assigned to you in SFDC and assigned to the correct campaign.
- If the contact belongs to someone else, you'll both get an email to sort it out

Be aggressive - nobody comes to you

- Pre-booked meetings take priority over potential meetings
- Walk away from unproductive meetings - time at events is limited.
- Most impromptu meetings (leads) happen at communal locations - have the HubSpot page handy

After meeting on the floor...

- Take notes immediately and track all conversations in Salesforce: *Who did you talk to? What did you talk about? What's the account? What are their pain points? How big is the company? Any funny anecdotes?*
- Schedule an email later that day to book meetings and OAs.

During the Event

First name*	Last name*
Work Email*	Company name*
Work Email address	
Phone number*	
Total Annual Sales*	
Please Select	
Monthly Ad Spend*	
Please Select	
Select Account Executive*	
✓ Please Select Aaron Snow Alicia Marshia Andrew Johnson Brooke Scahill Chris Gika Dan Serignese Dave Hughes Erin Murray Jason Campana Jason Magee Julia Ricciardi Kevin Stratos Molly Roach	

After the Event

Sales Leaders own post-event messaging

- **Groove sequence** multiple touches over multiple weeks prior to event via phone, email, and LinkedIn InMail
- Goal: Further conversations with engaged contacts (people who were interacted with during the event)
- AE selects contacts to personally continue outreach - not included in Groove cadence
- After the Groove flow is finished, all non engaged contacts and non-meeting will receive an email from Marketing

Event Recap

- The week after an event, Liz and Ben will hold an event recap to analyze data and determine next steps
- Each AE's opportunities and targets will be reviewed in turn

Upcoming Events

- **Let's Grow Walmart Seller Summit: 8/29-8/31 in Las Vegas, NV - Marquee**
 - Jason, Chris, Alicia, Dave, Taran, Dan, Henry, Sharon, Alex
- **Amazon Accelerate: 9/12-9/14 in Seattle, WA - Marquee**
 - Jason, Chris, Aaron, Dan, Pat
- **GroceryShop: 9/18-9/21 in Las Vegas, NV - Marketing Led**
 - Kevin, David
- **MAGIC New York: 9/19-9/21 in New York, NY - BOG**
 - 2 unassigned AEs
- **PI Apparel Merchandise Planning: 10/23-10/24 in Brooklyn, NY - Marketing Led**
 - Pat, Julia
- **Amazon unBoxed: 10/24-10/26 in New York, NY - Marquee**
 - Jason, Chris, Jared, Julia, Dan, Molly
- **AMZ Innovate: 11/13-11/14 in New York, NY - Marketing Led (and an add-on event on 11/15)**
 - 3 unassigned AEs

Q&A

Events Calendar - All Events

[Link to Calendar](#)

Event	Scale	Attended / Sponsored Before?	Participate in 2023?	Committed?	Proposed Budget	Actual Cost	Start Date	End date	Location
AdMax	Tentpole	☒	☒	☒	\$15,000	\$17,724.60	1/25/2023	1/26/2023	Virtual
Natural Products Expo West	BOG	☐	☒	☒	\$6,000	\$1,628.79	3/7/2023	3/11/2023	Anaheim
Partner Webinar - Ecommerce Powerhouse Roundtable	Partner ...	☒	☒	☒	\$0	\$0.00	3/8/2023	3/8/2023	Virtual
Prosper Show	Marquee	☒	☒	☒	\$254,000	\$224,408.41	3/13/2023	3/15/2023	Las Vegas
Marketplace Madness	Tentpole	☒	☒	☒	\$14,000	\$16,669.40	4/28/2023	4/29/2023	Virtual
Partner Webinar - Riverbend	Partner ...	☐	☒	☒	\$0	\$0.00	5/31/2023	5/31/2023	Virtual
SellerCon	BOG	☒	☒	☒	\$5,000	\$3,933.94	6/1/2023	6/3/2023	Austin
Countdown to Prime Day	Tentpole	☒	☒	☒	\$14,000	\$20,022.31	6/14/2023	6/14/2023	Virtual
Outdoor Retailer - Summer	BOG	☐	☒	☒	\$10,000	\$4,687.40	6/19/2023	6/21/2023	Salt Lake City
Cannes Lion - Amazon Port	BOG	☒	☒	☒	\$45,000	\$11,371.59	6/19/2023	6/23/2023	Cannes
Partner Webinar - nocnoc	Partner ...	☐	☒	☒	\$0	\$0.00	6/27/2023	6/27/2023	Virtual
Cosmoprof	BOG	☐	☒	☒	\$10,000	\$2,312.14	7/13/2023	7/16/2023	Las Vegas
Partner Webinar - Kickfurther	Partner ...	☐	☒	☒	\$0	\$0.00	7/25/2023	7/25/2023	Virtual
Partner Webinar - Movley	Partner ...	☐	☒	☒	\$0	\$0.00	8/1/2023	8/1/2023	Virtual
Prosper+ & NY Now	Marketin...	☐	☒	☒	\$20,000.00		8/13/2023	8/16/2023	New York
Partner Webinar - Profasee & Wizards of Ecomm	Partner ...	☐	☒	☒	\$0	\$0.00	8/15/2023	8/15/2023	Virtual
eTail Boston	Marketin...	☒	☒	☒	\$25,000.00		8/21/2023	8/24/2023	Boston
Let's Grow: Walmart Seller Summit	Marquee	☐	☒	☒	\$150,000.00		8/29/2023	8/31/2023	Las Vegas
Amazon Accelerate	Marquee	☒	☒	☒	\$85,000.00		9/12/2023	9/14/2023	Seattle
GroceryShop	Marketin...	☐	☒	☒	\$15,000.00		9/18/2023	9/21/2023	Las Vegas
Partner Webinar - eComEngine	Partner ...	☒	☒	☒	\$0		9/19/2023	9/19/2023	Virtual
MAGIC New York	BOG	☐	☒	☐	\$4,000.00		9/19/2023	9/21/2023	New York
World of Walmart	Tentpole	☒	☒	☒	\$14,000		9/26/2023	9/27/2023	Virtual
PI Apparel Merchandise Planning	Marketin...	☐	☐	☐	\$10,000.00		10/23/2023	10/24/2023	New York
Amazon unBoxed	Marquee	☒	☒	☒	\$55,000.00		10/24/2023	10/26/2023	New York
AMZ Innovate	Marketin...	☐	☐	☐	\$25,000.00		11/13/2023	11/14/2023	New York

Overview

How we think about in-person events

- Be smart and make our lives easier
- Events are TEAM effort - **!!Revenue Team!!**
- Aggressive growth goals means we need to build to scale efficiently
- A critical piece of the revenue engine - if executed well
- Events are complicated & time consuming
- Events are a primary target for budget scrutiny



LFG!!!!!!!