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The Playbook for Creating Sales and Marketing Alignment in Your Event Strategy

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Introduction

90% of sales and marketing teams are misaligned on strategy, process, content, and more. They're focusing on different tactics, measuring success with separate metrics and using tools that don't speak the same language.[1] The weight of this problem transcends organization, costing businesses worldwide over $1 trillion every year.[2]

Both departments tend to agree that B2B events are key to long-term success. But, when you break down each team's responsibilities, that's where things start to go awry.

The salesperson's role is clear: Create and advance opportunities that ultimately drive revenue. The marketer's job is less straightforward. While the goal is to enable business growth, their strategy often focuses on driving brand awareness, generating leads and educating customers — actions that don't always translate to revenue.

An effective way to facilitate sales and marketing alignment is to design a playbook both teams can use to execute a common, unifying strategy. By centering your efforts around live customer engagements, you can empower sales and marketing to make a measurable difference.

In this playbook, we'll guide you through creating alignment at B2B events and the roles that sales and marketing teams play in the process.

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Goal Alignment

It's no secret that salespeople and marketers compete with each other. But, in reality, they're playing two different games. Whereas sales's main goal is to close deals, marketing's priority is more often to generate demand. These priorities are siloed and therefore don't produce the intended growth the company needs. Even if they are aligned, they're usually using different key performance indicators (KPIs) to measure success.

At B2B conferences and trade shows, which are substantial investments, it's vital that sales and marketing establish their ideal event outcome, set specific goals, align on metrics and — most importantly — understand how these items support the company's broader strategic priorities.

Below, we've outlined a framework for sales and marketing goal alignment at an event:

	Establishing the Big Picture	Setting Measurable Goals	Aligning Event Goals to Success
QUESTIONS	• Who is our target audience? • What are their topics of interest? • How do we define success for this event?	• How will we measure performance? • What metrics are most important?	• What specific results are we targeting? • How will this event benefit our company?
EXAMPLE	**Ideal Outcome:** Engage qualified decision makers and buyer influencers to share new product innovations and advance business opportunities to the next stage.	**KPIs:** # of engagements that contribute or advance pipeline/revenue.	**Success:** Closing 20% of opportunities, thereby driving business growth.

Establishing your audience defines who teams should be engaging with, while KPIs determine what actions they'll take to do so. By connecting event goals to broad business initiatives, you can ensure your event strategy is programmed to further the company's long-term success.

Strategy Alignment: A Meeting-Centric Approach

Once goals are aligned, sales and marketing teams must agree on how they'll approach them.

Because live engagements are key to the B2B customer journey, meetings and sessions present the most impactful and logical path forward. In fact, 79% of business leaders agree in-person meetings are the best way to meet and sell to new clients.[3] So, marketers and sales reps can leverage attendee engagements to advance opportunities and directly nurture prospects down the funnel.

However, booth traffic alone won't materialize into many deals. Pre-programming your event by booking engagements in advance will ensure you're set up for success. Whether salespeople are reaching out to attendees or marketers are enabling inbound meeting requests from event attendees, both teams must stay in sync.

There are three steps critical to this process:

Evaluate personnel: Based on attendee interest and demand, ensure the right subject matter experts, executives and sales reps are at the event. This allows you to connect attendees to topics and stakeholders that can most credibly speak to these interests.

Assess resources: Secure ample meeting space, including hospitality suites and external venues, to facilitate engagements. Likewise, procure the necessary equipment for your booth, meeting rooms and suites: whiteboards, microphones, monitors, etc.

Secure technology: At a minimum, you should have badge scanning software, registration software (if your company is organizing the event) and a meeting scheduling automation platform. These tools not only help you collect leads, but also maximize your total customer engagements at the event.

Strategy Alignment: Inbound and Outbound Roles

Sales reps and marketers both have significant responsibilities when it comes to executing a live engagement strategy.

Marketing Role:
Facilitating Customer Engagement

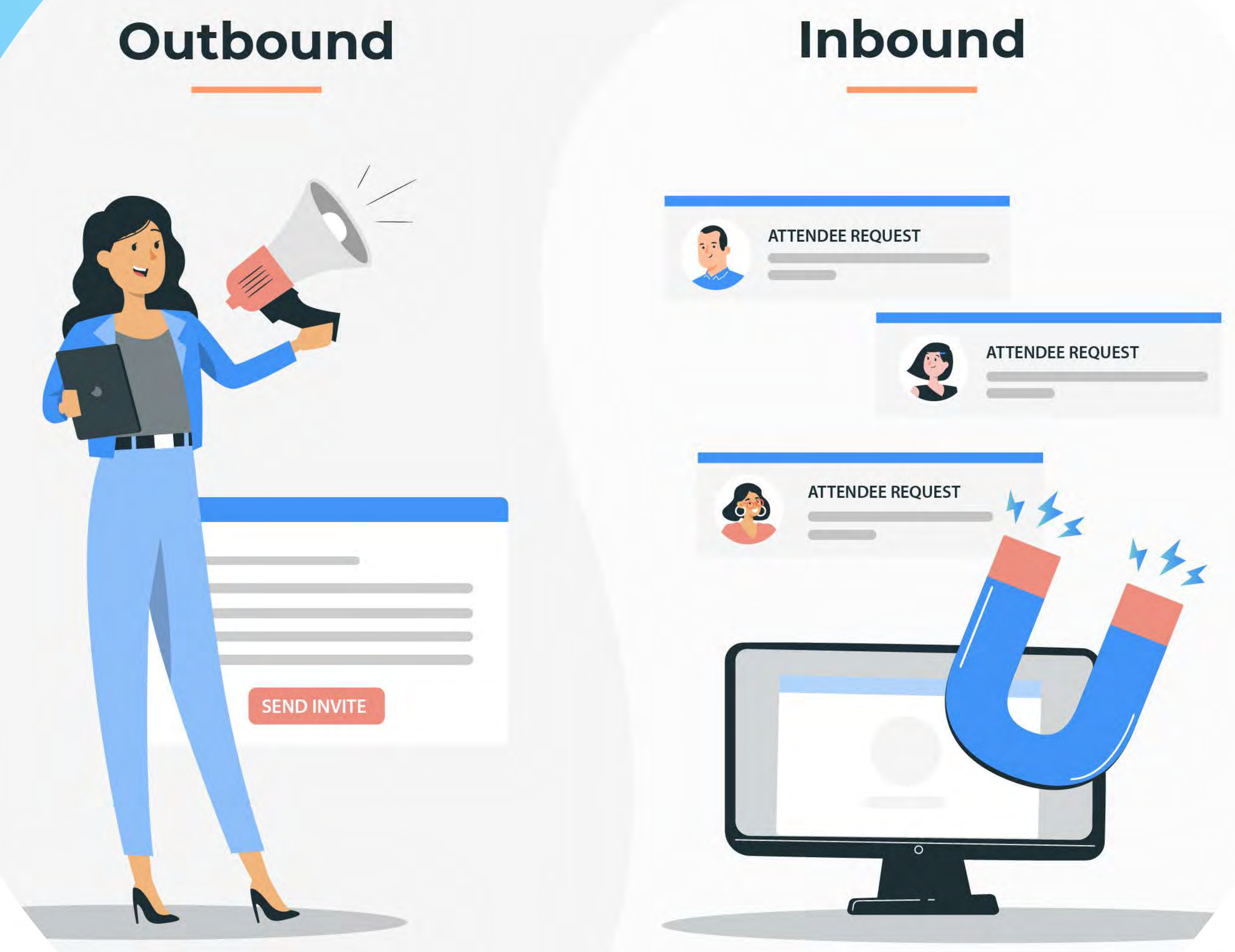
Marketers should focus on building a naturally welcoming environment, whether it's at their booth on the trade show floor or in their designated meeting spaces. They're also responsible for empowering sales reps with a streamlined process to easily schedule meetings for impactful customer conversations at the event.

Additionally, marketers must drive inbound meetings at scale through integrated marketing and demand-generation campaigns — the idea being that inbound requests have the best chance to increase pipeline, convert to revenue or advance other goals. With pre-event marketing targeted to your specific audience, you can effectively pre-program the event and schedule more meetings and sessions.

Sales Role:
Booking Outbound Meetings & Sessions

Salespeople know their prospects and customers best. They understand the buyers' journey and the need to connect them with their organization to advance sales, which means they're in the best position to execute an outbound engagement strategy. Sales must take ownership to proactively reach out to prospects to understand their topic of interest and set up appointments at the event.

For best results in scheduling a quality meeting, they need to leverage their expertise and client knowledge, and provide the context and opportunity information for internal participants like executives and experts to best prepare for the meeting. Afterwards, they can continue to nurture the relationship and push prospects closer to their ultimate goal, such as a deal, adoption or expansion.



Communication and Collaboration

Collaborative environments are the fabric of sales and marketing alignment. You can have a shared vision and even a strategy to make it a reality, but misalignment is inevitable if teams aren't communicating throughout the process.

Sales and marketing must have frequent check-ins before, during and after an event. At these junctures, both teams should be collaborating on agendas, recapping sessions and sharing their scheduling metrics. Moreover, they should acknowledge their gaps and develop actionable plans to optimize engagements moving forward. This step is key to avoiding double bookings, time-zone errors and other mishaps that could derail the engagement strategy.

Of course, customer communication is equally important. Salespeople should maintain direct contact with their top business opportunities to understand who plans on attending the upcoming show. This allows them to discover their topics of interest and proactively schedule them into corresponding engagements.

Meanwhile, marketing communications have to inform both the sales team and their target customers about why they're reaching out to them in the first place. You might be launching a new service, announcing changes, hosting VIP receptions or inviting prospects to a demo. No matter the reason, marketers should leverage the appropriate channel to broadcast their message and generate interest in the brand (and the event).

Scheduling & Tech Alignment

By this point, sales and marketing are aligned on an organizational goal: increasing customer engagements. However, this effort is all for naught if departments aren't aligned in two critical areas:

Inbound & Outbound Scheduling

The meeting scheduling workflow is notoriously complex. You're managing tens or even hundreds of internal staff, various sessions, dozens of topics, multiple calendars and different time zones. Plenty can go wrong with so many moving parts, which is why it's crucial to streamline the process.

Here are three steps you can take:

Make pre-scheduling easy. Create an effective way for salespeople to pre-book engagements.

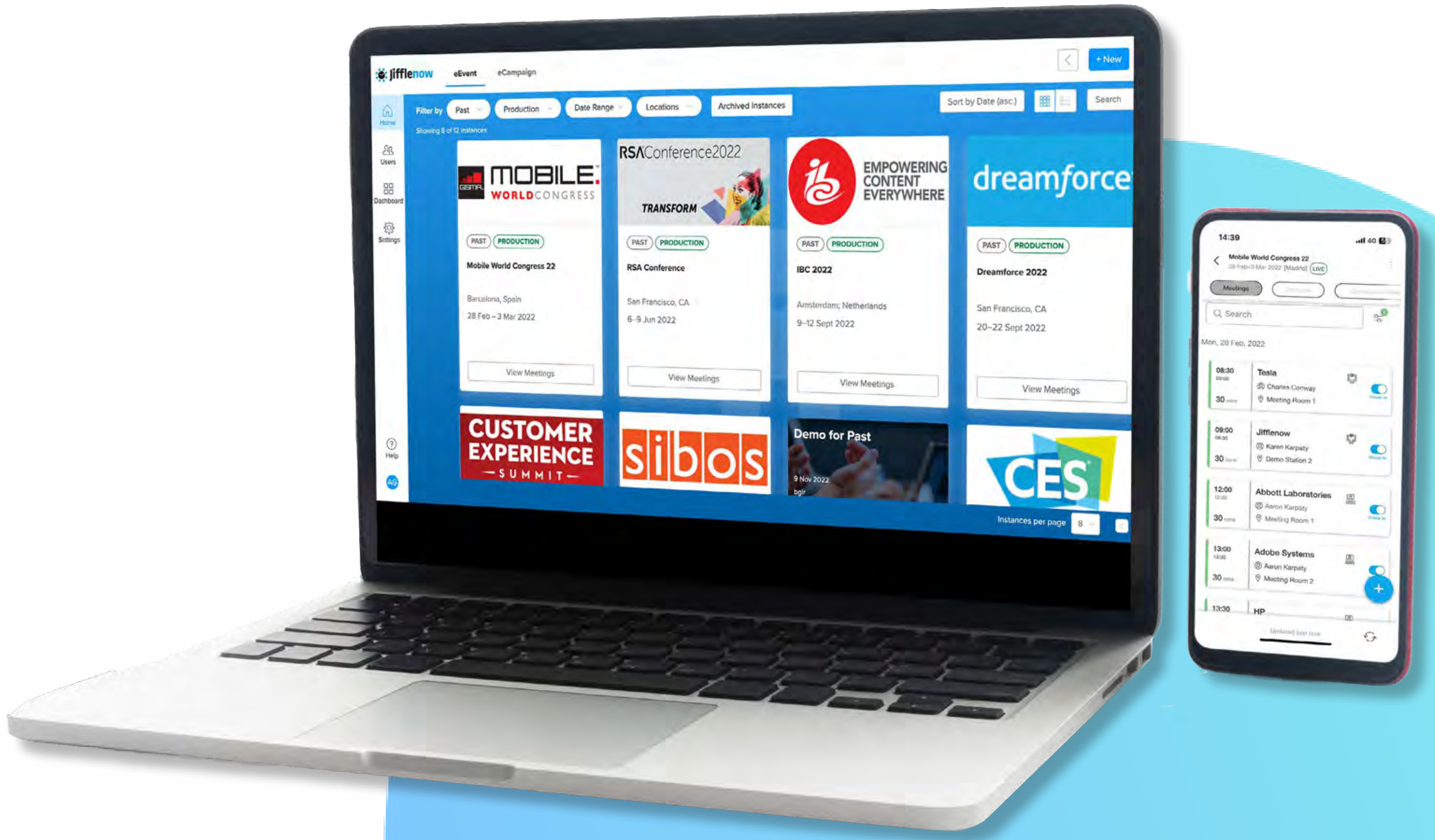
Simplify inbound confirmations. Enable targeted prospects to request meetings directly. With a meeting scheduling automation tool, you can define approval processes and automate notifications to keep internal and external meeting participants updated in case of conflicts or scheduling changes.

Optimize resources and event staff. Setup adequate meeting spaces and establish which topics, products or services are of interest before the show, ensuring the right experts and resources are available at the event.

Event Tech Alignment

Your scheduling tool must be able to map your choice of engagement types with topics, key internal team members, and meeting or session locations. This makes it easier for sales, as all they have to do is schedule a meeting by selecting the meeting type and topic of interest so the system can automatically find available time slots for the right staff and location. Likewise, this frees up marketing to focus on campaign messaging because customers and prospects can easily submit meeting requests by selecting available time slots based on topics of interest. These requests can be set to auto or manual approvals.

It's also important that scheduling software integrates seamlessly into your event tech stack. Look for a robust platform that syncs meeting and participant data with marketing automation and CRM tools. This breaks down data silos and makes it easier to track KPIs.



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On-Site Success and Follow-Ups

Sales and marketing must also account for attendees walking the showroom floor who may be interested in their brand. Ad-hoc meetings are a great way to boost your scheduling metrics and generate more opportunities for your sales team.

If engagement volume allows it, booth staff can leverage on-site traffic to book more inbound meetings. Having a check-in desk or self-service station equipped with automated scheduling software allows users to instantly request an engagement. Moreover, check-in desks help attendees get where they need to go to avoid no-shows and missed opportunities.

A fully featured scheduling tool can also send automated reminders and follow-up messages, which help increase attendance rates and notify participants of sudden changes to the agenda.

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Post-Event Review

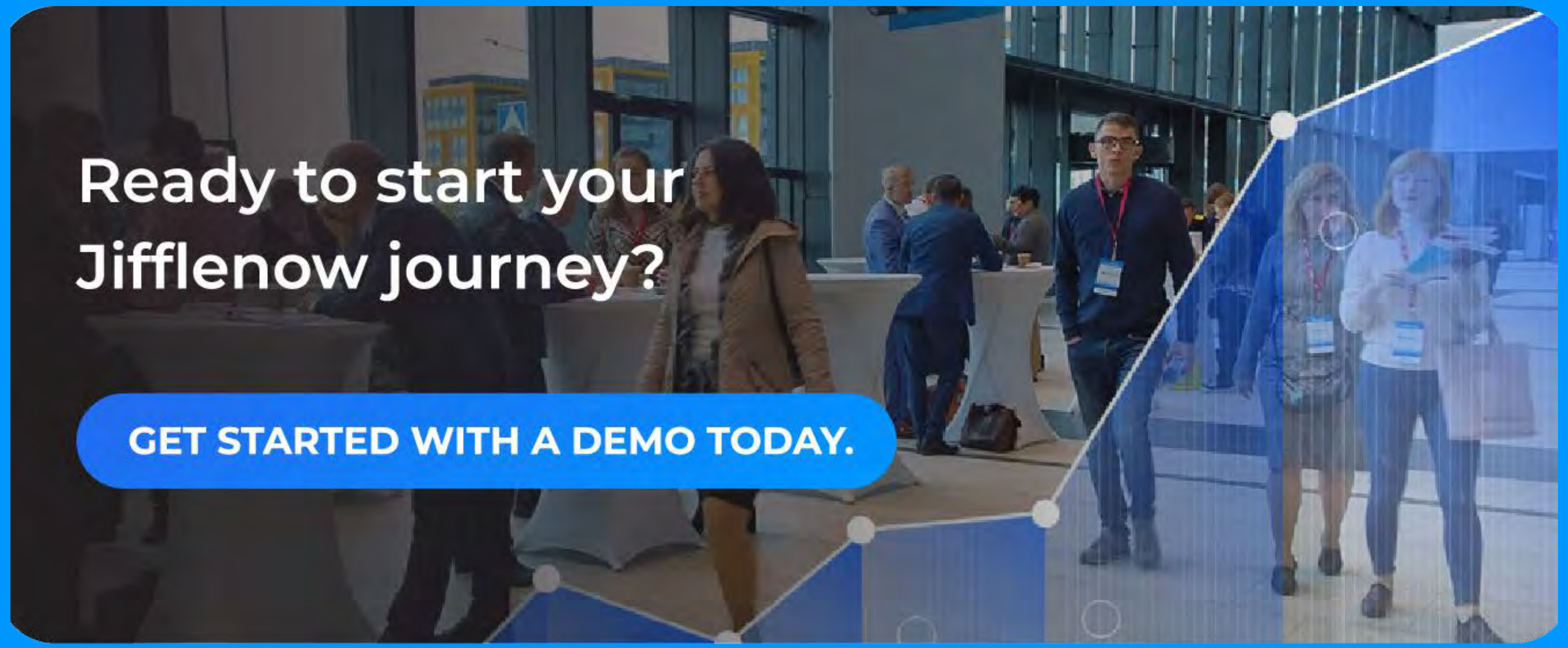
Once the show wraps, there's still time for sales and marketing to align on next steps. Internally, it's important to debrief your team leadership using on-demand reports with collected feedback and metrics, helping them understand what worked and what could be improved in future events.

Meeting scheduling automation software makes reporting easier. You can easily collect meeting and event data, evaluate critical KPIs and track engagements to opportunities in the CRM. This information allows organizations to understand event performance at a granular and big-picture level. When measured against other events over time, this gives you visibility into event ROI.

For example, Jifflenow eEvent software is a robust platform that accelerates the scheduling workflow from start to finish. It enables inbound requests mapped to specific topics, engagement types and locations so that you can easily manage the mayhem. By simplifying the process, you can eliminate back-and-forth communication and focus on strategic activities that produce positive business outcomes.

You can bridge the gap between marketing and sales with a centralized hub for schedules, attendee data, meeting notes, and more. Funnel insights back into your B2B event program, amplify engagement and enable continuous improvement.

Learn how Jifflenow can help you engage more customers and prospects by requesting a demo today.



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Jifflenow is the leader in automating the scheduling, registration, management, and reporting of B2B meetings and sessions. Its software is enterprise-class and supports unique workflows and data security requirements. Jifflenow software is proven and trusted by Fortune 1000 companies. **Learn more at jifflenow.com**