

SAMPLE Event Tactical plan

Campaign: Annual Meeting
Job Name: Strategic & Tactical Planning

Overview

Based on the attendance and sales goals, this document serves as a road map for each of the deliverables that will be executed throughout the duration of the campaign.

Attendance Goals: _____

Sales Goals: _____

Messaging Platform

Objective

The objective of the messaging platform is to develop strong messaging for key benefits for attendees, and sponsors to ensure consistent messages in all marketing deliverables.

- Outline a compelling value proposition emphasizing the bottom -line benefits of participation
- Communicate urgency so that prospects are persuaded to participate in the current year, rather than putting it off.
- Outline the benefits of bringing a larger team to the conference.
- Generate excitement about the specific benefits and opportunities the event provides attendees

Email Campaign

Objective

The objective of the email campaign is to create awareness, inspiration and engagement across all audience segments.

Recommendations

The purpose of an email marketing campaign is to provide prospective attendees with key features of the program that ties back to our unique value proposition. Achieve this by incorporating pertinent industry information that ties into session topics as well as deadline drivers and key show feature highlights. Each email tactic below outlines suggested deployment day, format, segmentation and its

purpose.

Audience Segmentation

Segmentation is most successful when the message can be tailored to specific audiences to create a personal touch within an overall email campaign. Segmentation based on various things from lapsed, loyal and first-time attendees.

To maximize attendee engagement, continue the conversation with registered attendees. Interacting with registered attendees minimizes last-minute cancellations and encourages them to invite colleagues or share their participation on social media.

Email Plan

EM 1a – Teaser Message: Types of Education & Save the Date

Versions: 1

Send date:

Lists: Non-Attendees

Message: This email will showcase the types of educational topics that are presented at Annual Meeting. The email will showcase the education highlights from the last Annual Meeting that focus on the top issues for the aging services field. The message will also include a version save the date.

EM 1b – Teaser Message: Schedule of Events & Save the Date Animation

Versions: 1

Send date:

Lists: All prospective attendees

Message: This email will share the schedule of events with education topic highlights for Annual Meeting.

EM 2 – Registration open (+ TRIGGER)

Versions: 1

Send date:

Lists: All prospective attendees

Message: This email will announce the opening of registration. It will highlight key show features and benefits along with relevant industry information that amplifies the benefits of why it is so important to attend the Annual Meeting. This email would also include the UVP and a strong call to register.

Trigger Message

Versions: 1

Lists: Anyone that opened EM2 and did not register

Format: Text

Message: The goal for this follow-up email will be remind people that opened EM2 to act and register. The message will be concise in messaging and include a strong call to action to register.

EM 3 – Keynote Highlight (+ TRIGGER)

Versions: 2

Send date:

Lists: All prospective attendees; Registered attendees

Format: HTML

Message: The purpose of this email will be to highlight a keynote session. It will provide a high-level overview of the topic and how that speaker's content is designed specifically for attendees. This email will also tie in any pertinent industry information around that speaker i.e. regulatory environment, business landscape, leadership, or motivation.

Trigger Message

Versions: 1

Send date:

Lists: Anyone that opened EM3 and did not register

Format: HTML (video)

Message: This triggered message would include a video from the speaker inviting prospects to register. The goal for this follow-up email will be to provide a personalized touch on the topic for EM4. Having a video to support the invitation will be included and the message will have a strong call to action to register.

EM 4 – Track Highlight

Versions: 3 - Lapsed, Loyal and First Time Attendees

Send date:

Lists: All prospective attendees and Lapsed (group 1) and last year attendees (group 2)

Format: Text

Message: This email will be concise. The intro will address how to plan your experience at Annual Meeting and know what sessions are good matches for your goals. The CTA will invite prospects to learn more, which will take them to a landing page where we call out the different sessions with a short introductory (1-2 sentences) description about what they can find in each track.

EM 5 – Discover the Expo Hall

Versions: 4 - Lapsed, Loyal and First Time Attendees

Send date:

Lists: All prospective attendees; Registered attendees

Format: HTML

Message: This email will highlight the big things happening in the Expo Hall. This will focus on the myriad of experiential activities directly available to learn and experience onsite via sight, touch, sound and taste.

EM 6 – Networking Focus

Versions: 2

Send date:

Lists: All prospective attendees; Registered attendees

Format: Text

Message: This email will showcase the wide array of networking activities. The highlight will be that this event is the place to network and connect with peers and suppliers/vendors.

EM 7 – Session Planner/Highlights

Versions: 2

Send date:

Lists: All prospective attendees; Registered attendees

Format: HTML

Personalization: None

Message: The purpose of this email is to offer further insight to additional education available onsite at Annual Meeting and include corresponding benefits relevant to earning continuing education credit (CE) to further elevate their professional lives.

EM 8 – Day-by-Day session and event highlight

Versions: 2

Send date:

Lists: All prospective attendees; Registered attendees

Format: HTML - infographic style

Message: Using an infographic style message, this email will be our second session highlight, but also focus on the 3-5 must-experience events during the meeting. The content for the must-experience pieces can relate to the specific segments of the audience.

EM 9 – Education Focus - Annual Meeting Audience Profile

Versions: 2

Send date: October 4, 2018

Lists: All prospective attendees; Registered attendees

Format: HTML

Personalization: None

Message: This email will showcase more education at the event. The secondary message will be a graphic that shows the audience profile of the Annual Meeting to show the widespread representation of the event. We recommend utilizing this email in graphic form to show the representation of the attendees (either by region or job title) and exhibitors by category or just as exhibitors (depending on the availability of the information).

EM 10 – Upsell Email

Versions: 1

Send date:

Lists: All speakers, and trade show only attendees

Format: Text

Personalization: None

Message: This will be an upsell message for those attendees that have purchased day passes, trade show only passes or are speakers. The email will highlight the overarching benefit of being a full attendee at the event. Use a testimonial from a past attendee that shares the unmatched benefit of attending Annual Meeting.

EM 11 – Last Chance to Register - Regional Push

Versions: 1

Send date:

Lists: All local prospects

Format: Text

Personalization: None

Message: This will be the final call for registrations by noting that the event is in their backyard. The email will draw on the relevancy of the event by highlighting an industry topic that will be addressed alongside the additional fun and engaging activities. Email will be succinct and drive prospects to register.

Direct Mail & Print Campaign

Objective

The objective of the direct mail campaign is to generate interest, create awareness, establish the event's positioning and educate on special features of the event that drive conversion.

Recommendations

The purpose of the direct mail campaign is to provide prospects a tangible piece where they can easily see the offerings of the Annual Meeting & Expo. It also helps to breakthrough the clutter of emails and get noticed in the mail.

Direct Mail Plan

DM 1: Attendee Brochure

Versions: 1

Send date:

Lists: All prospective attendees

Format:

Strategy: The purpose of the attendee brochure is to provide the recipient with enough information to pique their interest and drive them to the website to learn more. The benefit of teasing the information out as opposed to providing all information upfront is two -fold. First, it keeps your messaging concise and makes the deliverable feel more manageable to the recipient. Second, it drives them to the website where they can easily register once they get all the information they need to make their decision to attend.

DM 2: Annual Meeting Preview

Versions: 1

Send date:

Lists: All prospective attendees; suppress registered attendees

Personalization: None

Strategy: The Annual Meeting Preview is a great tool for outlining all of the tremendous offerings in the LeadingAge Annual EXPO. It will highlight new features, attendee favorites and

provide a full listing of exhibitors and product categories. LeadingAge will provide copy and mdg will review and make copy suggestions.

DM 3: Regional Postcard

Versions: 1

Send date:

Lists: All regional prospective attendees

Format: Oversized Postcard

Personalization: None

Strategy: Focus on the targets closet by. It is recommended to create an oversized postcard to stand out in the mail.

EXHIBITOR SALES CAMPAIGN

Email Campaign

Objective

The objective of the email campaign is to create awareness, engagement and ultimately conversion for past and prospective exhibitors and sponsors.

Recommendations

The purpose of this email marketing campaign is to provide past and prospective exhibitors with key features and benefits of exhibiting at the Annual Meeting & EXPO and providing the information and key message points to convince them to secure their space.

Exhibitor EM 1: Exhibit sales are open and going strong

Deployment Date:

Format: HTML

Versions: 1, Exhibitor Prospects

Purpose: This email will inform potential exhibitors of the overarching benefits of becoming an exhibitor and to generate buzz about the event.

Exhibitor EM 2: Secure your booth now

Deployment Date:

Format: HTML

Versions: Two, Past Exhibitors and Exhibitor Prospects

Purpose: This email will highlight and inform our prospects of the benefits. This message will include a CTA to secure their booth space or participation.

Deployment Date:

Format: HTML

Versions: Two, Exhibitor Prospects and Current Exhibitors

Purpose: This email will highlight the opportunities available to enhance your brand/company awareness. This will include sponsorship and an ad in the Preview.

Exhibitor EM 3: Look who's coming - your next customer

Deployment Date:

Format: HTML

Versions: One, Exhibitor Prospects

Purpose: This email will support interest and momentum in driving exhibit sales by providing an audience profile of Annual Meeting. Utilizing strong graphics will provide this profile by segmentation within the nonprofit aging services field, so that all prospective exhibitors see this event as a must-attend.

Deployment Date:

Format: HTML

Versions: Two, Exhibitor Prospects and Current Exhibitors

Purpose: This email will share the audience profile of a Annual Meeting attendee to encourage booth sales and advertising sales. Both advertising and exhibiting components will share the numbers that you're brand will have access to highlight the opportunities available to enhance your brand/company awareness. This will includes sponsorship and an ad in the Preview.

Exhibitor EM 4: Highlight top features/Call-out new features added

Deployment Date:

Format: HTML

Versions: Two, Past Exhibitors and Exhibitor Prospects

Purpose: This email will highlight the top events within the Annual Meeting for networking with attendees, focusing on the ability to drive new business relationships on and around the show floor. For the past exhibitors, there will be a callout of specifically what's new.

Exhibitor EM 5: Maximize your time- It's not too late to sign up!

Deployment Date:

Format: HTML

Versions: One

Purpose: This email will sell any final space that may be available. The email will stress the urgency of securing a space as sponsorships are expected to sell out.

Marketing Collateral

Sales Postcard

Oversized postcard that communicates the benefits of exhibiting at the LeadingAge Annual Meeting and drives prospects to the website to learn more

PPT Presentation