



## TOOLS FROM THE FIELD

# Conference Readiness Checklist

Before you commit the budget, book the booth, or send the team into another badge scan marathon, pressure-test the plan.

**USE THIS WHEN** a conference, trade show, SKO, CAB, or customer event is about to become real money.

- CHECK 1**  
**Why are we going?**  
Name the business reason in one sentence. Pipeline, launch momentum, customer engagement, partner influence, or executive access.
- CHECK 2**  
**Who matters most?**  
Define the audience before the agenda: target accounts, personas, customers, partners, executives, analysts, or internal teams.
- CHECK 3**  
**What does success look like?**  
Pick the few outcomes leadership will care about after the event. Avoid measuring everything and proving nothing.
- CHECK 4**  
**Is the investment level right?**  
Match spend to expected return. Be honest about booth size, sponsorships, travel, creative, meetings, and follow-up resources.
- CHECK 5**  
**What is the sales plan?**  
Clarify account lists, meeting goals, outreach owners, onsite roles, executive asks, and the handoff after the event.
- CHECK 6**  
**What will people remember?**  
Build one creative hook, customer moment, executive experience, or activation that makes the program more than a calendar hold.
- CHECK 7**  
**What happens before doors open?**  
Plan pre-event outreach, partner alignment, briefing materials, meeting prep, customer invites, and internal enablement.
- CHECK 8**  
**What happens within 48 hours?**  
Decide the follow-up path before the event starts: owners, messages, SLAs, sales notes, customer thank-yous, and next plays.
- CHECK 9**  
**What will we learn?**  
Run a fast debrief while the signal is fresh. Capture sales feedback, customer insights, content gaps, and what to improve next time.

## A useful gut check

If the plan is fuzzy before the show, it will be expensive after the show. Tighten the why, the who, and the follow-through.