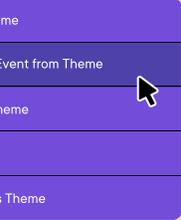


splash

Evaluation Guide for Event Platforms

Check off this criteria when adding event software to your martech stack.

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About

You already know that events — from in-person roadshows and summits to virtual VIP dinners and launch moments — are a favorite engagement and conversion channel for your organization. They're a chance to brand your company as a thought leader, generate demand for your offerings, increase product adoption, and strengthen customer retention and loyalty.

In a [Harvard Business Review](#) survey of more than 700 executives, 52 percent said events drive more business value than any other marketing channel.

But which event marketing technology is best for driving that value? Event marketing platforms extend beyond supporting just annual tentpole events or conferences — they should enable you to create and host in-person, virtual, and hybrid programs that maximize ROI. And they should be usable by everyone in your organization: democratizing who can derive value from event programs, centralizing the data that demonstrates that value, and enforcing brand standards with the right permissions.

For too long, it's been impossible to market, measure, and scale events in a single platform. Companies need a way to create beautiful, on-brand marketing assets for their events and ensure their effectiveness in driving registration, attendance, lead flow, and ultimately, results.

This guide is your roadmap to understanding the key roles involved in an event marketing platform evaluation, the lifecycle of event marketing, which features and functionality to look out for, and what best practices and pitfalls to be aware of in deploying your selection.

Who Should Evaluate

Ultimately, anyone in your organization responsible for vetting marketing technologies should be involved in selecting an event marketing platform. It's useful to include a marketer responsible for running and hosting events, who will be working in the tool on a day-to-day basis, as well.

The best way to evaluate the software for your organization is to ensure that all players who touch events at your organization have shared their requirements.

That said, every organization is different. In some, employees play multiple roles, while in others, there may be several program implementers and designers. What's important is not your organization's role count or exact alignment to our bulleted list, but that the event marketing solution — the latest specialized addition to the martech stack — facilitates your organization's goals.



Executives should be able to review event program outcomes tied to established goals and strategic priorities.



Program Owners should be able to assess event program ROI by reviewing high-level KPIs and get visibility into event status at any time.



Program Implementers should be able to create event marketing materials, perform planning and day-of event responsibilities, and coordinate requests across stakeholders.



Operations Managers should be able to integrate event marketing technology into the organization's existing martech stack.



Designers should be able to create, brand, and repurpose digital event marketing assets, like event pages, emails, and social share cards.

How to Evaluate

Form follows function. As you evaluate event marketing software, ask yourself whether you and your team are supported throughout each stage of the event marketing lifecycle. If you're investing in technology that satisfies only a portion of your organization's needs — one that does not address each stage through in-product functionality, [native integrations](#), or embedded technology — then you've wasted time in the evaluation and budget on a poor deployment.

The Event Marketing Lifecycle

We've identified eight primary stages of a successfully executed event: creating programs in any format (virtual, hybrid, and in-person), managing event approvals, managing a guest list, designing compelling event marketing materials, promoting your event, checking guests in easily, [analyzing impact](#), and optimizing your event programs.

The right solution for your organization will directly address, or integrate with technologies that address, activities in each stage.

- 1. Virtual, Hybrid, and In-Person Programming:** Setting up an event program in any format or environment.
- 2. Event Approvals:** Receiving an event request or signal, and approving or assigning that event for execution.
- 3. Guest List Management:** Creating, approving, reviewing, updating, and giving visibility into the guest list.

- 4. Event Marketing Assets:** Creating event pages, invitations, and confirmations that meet brand governance requirements and are responsive on any device.
- 5. Promote Your Event:** Email communication, social sharing, web marketing, and following up with invitees and attendees.
- 6. Check-In Management:** Checking guests in easily, taking on-site notes, and communicating with guests.
- 7. Event Analytics & ROI:** Proving the event was a success. Reconciling guest information, collecting feedback, and sending ROI or "wrap" reports.
- 8. Event Data Management:** Optimizing your programs using internal data about how your team sets up and runs events.

Once you find a platform that addresses each of these stages, ensure it can scale with your team, is secure, remains compliant, and has built-in education and community for your users. There's a section in this guide for that, too.

In this guide, we will walk through each step in this lifecycle to specifically name which features and functionalities an event marketing platform should offer to help your organization harness the power of marketing's highest ROI channel.

Evaluation Checklist

You know your organization and its needs best, but as you conduct your evaluation of event marketing options, there are some key platform attributes to keep in mind. A successful implementation will need to meet this criteria across the event marketing lifecycle.

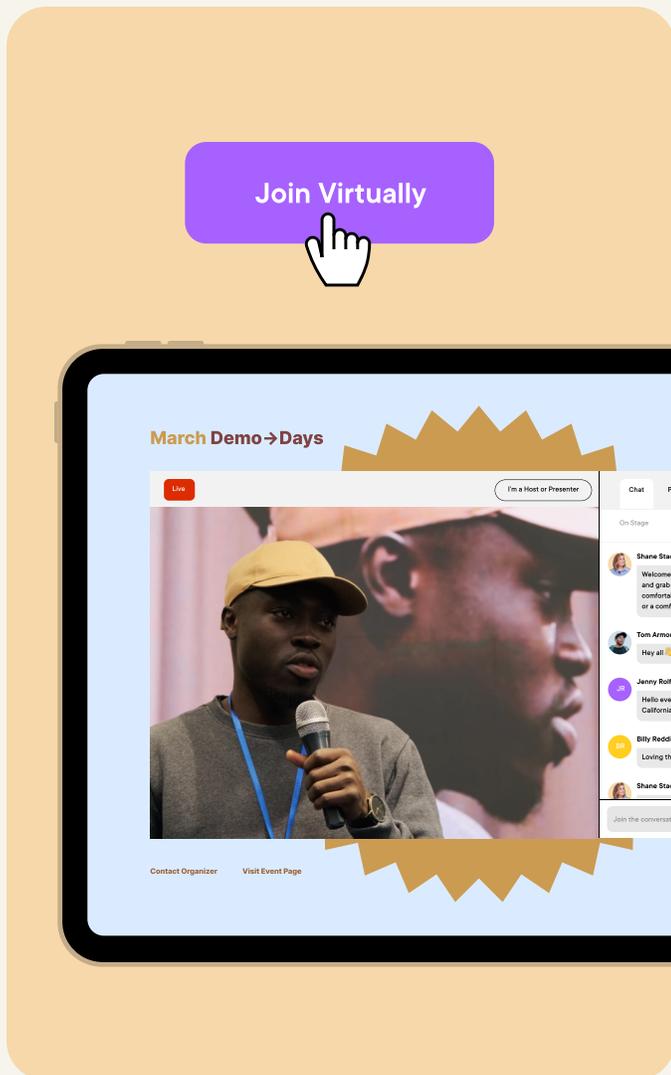
Virtual, Hybrid, and In-Person Programming

Impacted roles who should evaluate:

- Executives
- Program Owners ✓
- Program Implementers ✓
- Operation Managers ✓
- Designers

Increasingly, companies are realizing the value of virtual and hybrid programming. Your event solution should allow teams to create experiences in any format. That means it should enable marketers to promote and measure in-person events as well as host live streams with guest engagement.

Branding, data capture, and ability to scale programs are as critical requirements for “IRL” events as they are for virtual and hybrid ones. For programs that have online components, keep in mind that it should be easy to test live streams, communicate with multiple hosts or presenters, and engage guests with features like Q&A, polling, chat, on-demand playback, and networking. The value and memorability of a virtual or hybrid experience should rival that of an in-person event.



Checklist ✓

To support virtual, hybrid, and in-person events, an event marketing platform should allow your organization to:

- Build events that guests can attend in-person or in their browsers.
- Design beautiful guest registration forms and pages.
- Brand live streams to showcase your company in an online or hybrid format.
- Access sophisticated hosting tools with backstage and rehearsal options.
- Get frequent feature updates that keep guests engaged online, like Q&A, polling, and networking options.
- Schedule invites, reminders, and segmented follow-ups.
- Schedule guest list exports and enable Slack notifications for Revenue team visibility.
- Integrate with your CRM and MAP systems.

Event Approvals

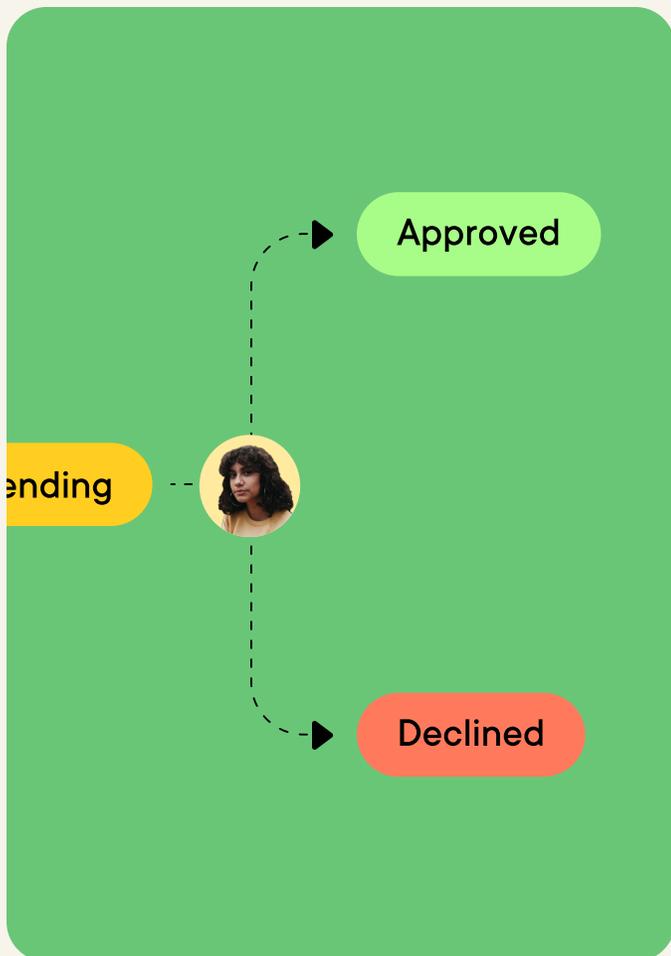
Impacted roles
who should evaluate:

- Executives ✓
- Program Owners ✓
- Program Implementers
- Operation Managers
- Designers

When it's time for your organization to host an event, who are the drivers, approvers, and contributors? It's common for leadership teams to create a consistent set of requirements before dedicating budget to an event program.

If your organization has an approval flow for events, your event marketing software should allow executives and program owners to review requests. Think of it this way: The easier you make it for your team to get up and running with their events, the more likely they are to generate impactful program ideas — and the faster the whole company will see results. In a nutshell, this is true event marketing at scale.

There's a reason Harvard Business Review says "strategically aligned enterprises have a much better chance of winning," and building in event management to your martech stack will help yours get there.



Checklist ✓

To support event approvals, an event marketing platform should allow your organization to:

<input type="checkbox"/>	Create and reuse internal event request forms.
<input type="checkbox"/>	Customize event request forms with specific questions and conditional logic (if this answer is "yes," then that question appears).
<input type="checkbox"/>	Manage — review, accept, and/or decline — event requests centrally.
<input type="checkbox"/>	Review all past and future events in one place.
<input type="checkbox"/>	Set user- and group-level permissions to designate an events review board.

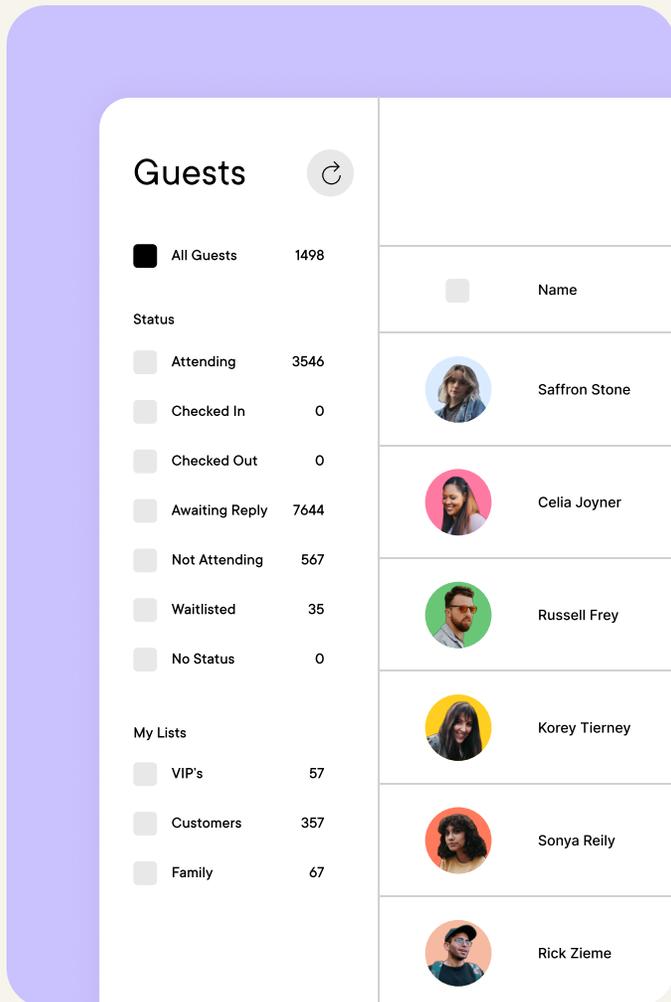
Guest List Management

Impacted roles who should evaluate:

- Executives
- Program Owners ✓
- Program Implementers ✓
- Operation Managers ✓
- Designers

Once approved, most teams build and maintain an event guest list. Your event marketing solution should let you import contact records and integrate with your existing customer relationship management (CRM) and marketing automation platforms (MAP) to keep your data accurate across systems. It's also important that teammates from various parts of the organization have visibility into guest list status: who's been contacted, registered, and ultimately attended.

Don't let simple contact managers fool you: If registration management isn't the backbone of your event marketing solution, you lose the advantage of leveraging guest data — from assessing interest by demographic to automating marketing emails by registration status. People who know events understand this: Guest registration ranks highest in [top features event marketers look for](#) in an event app.



Checklist ✓

To best manage guest lists and increase attendee alignment and awareness in your organization, look for an event marketing platform that allows you to:

- Import and export contact records.
- [Sync with CRM and MAP systems](#), like Salesforce and Marketo.
- Manage guests across events with contact-level tags, like press and personas.
- Create event-specific lists for certain types of guests, like VIP and dietary restrictions.
- Send emails to guest list segments, like those registered or who are part of a custom list.
- Add collaborators to your event who can view or make changes to the guest list.
- Set user- and group-level permissions to designate who is able to view and edit the guest list.

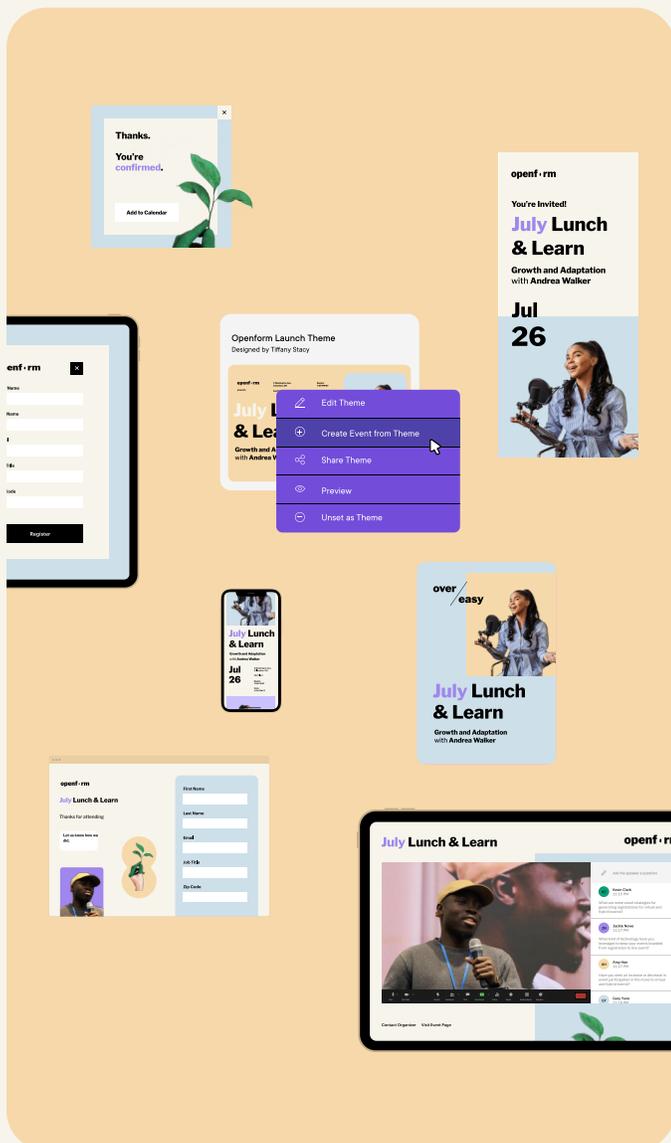
Event Marketing Assets

Impacted roles who should evaluate:

- Executives
- Program Owners
- Program Implementers ✓
- Operation Managers ✓
- Designers ✓

An on-brand, clean pre-event experience is perhaps the most critical part of marketing your event. You can raise — or crush — guest expectations with the right assets.

An event page that successfully markets your event and its agenda, optimally tailored social share materials, and personalized emails are mandatory in an event marketing platform — and everything needs to be consistent with your brand's design.



Checklist ✓

To create the right event marketing assets, your event marketing platform should allow your organization to:

- Create an event web page easily.
- Design your event page, including uploading your own fonts, colors, and logos, to match your brand.
- Have control over margins, padding, and other design elements of your digital marketing assets.
- Allow you to quickly duplicate parts of your event page, email, or social share card for reuse across multiple events.
- Design a bespoke social share card that previews your event page when promoting your event page URL.
- Create an event "hub," where you can build a webpage that allows guests to access registration for multiple events from one place.
- Add collaborators to your event who can give feedback or support the creation of your digital marketing materials.
- Set user- & group-level permissions so designers have access to marketing asset design, while implementers can update on-page copy.

Event Promotion

**Impacted roles
who should evaluate:**

- Executives
- Program Owners
- Program Implementers ✓
- Operation Managers ✓
- Designers ✓

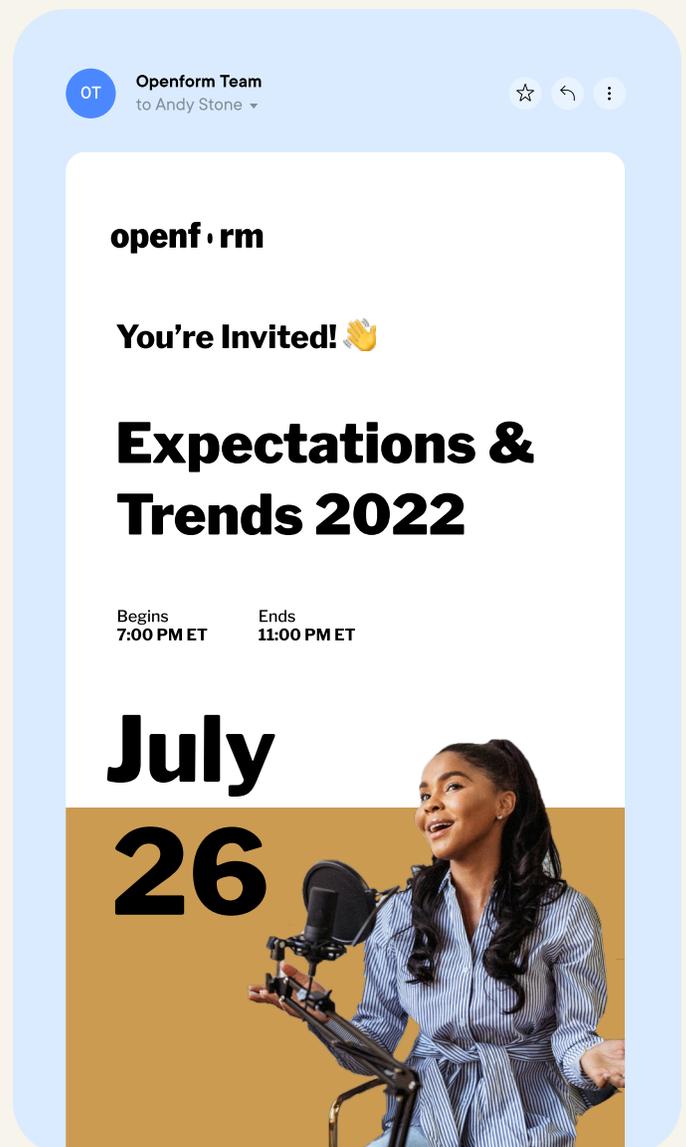
What good are beautiful marketing materials if they're never seen? Activate the right channels and you'll be looking at a full house; neglect communication and you can bank on low turnout. Remember: The ROI of your event is dependent on how many people you can get in the room. Don't let lead flow stall out before the show even begins.

Choose a platform that considers key promotional channels: email marketing, social sharing, and your website (consider an events calendar webpage). The smartest solutions give you the flexibility to customize and schedule these communications.

Checklist ✓

To promote your events effectively, your event marketing platform should allow your organization to:

- Send and schedule emails for automated guest communication.
- Customize email content based on information like registration status and guest type.
- Promote a bespoke social share card that previews your event page when its URL is shared.
- Build stages of your event page so that guests see an ideal version on the right timeline, e.g. a preview before the event, and a recap once it's over.
- Embed an event calendar on your organization's website for quick navigation and registration.
- Review email analytics like open rate, clicks, and deliverability without exporting your data.
- Designate which individuals in your organization can promote your event with the right level of access and permission set.



Check-In Management

Impacted roles who should evaluate:

- Executives
- Program Owners
- Program Implementers ✓
- Operation Managers ✓
- Designers

It all comes down to this: Who showed up? Your team should be confident that their event marketing tool gives them flexibility to support their guests' needs in real time and keep the line flowing so everyone's on-site experience is smooth.

You should be able to check guests in seamlessly at the door, print their badges, and take notes from one tool — and all this information should remain up-to-date in your CRM and MAP systems. If your program is online or hybrid, check-in should happen automatically, and your event platform should note how long attendees stayed on.



Checklist ✓

To effectively host events, your event marketing platform should allow your organization to:

- Check guests in using a web browser or app for any iOS or Android device.
- Enable guests to check themselves in via a self-service kiosk mode, or similar.
- Print guest badges upon check-in.
- Save on-site notes to guest contact records.
- Access guest information, like answers to registration form questions, from a mobile app.
- Keep CRM and MAP systems up-to-date with guest registration and attendance status
- Integrate with messaging applications, like Slack, to deliver real-time updates to your internal teams about who has checked in.
- Send emails to guests from a mobile app for real-time communication, like agenda revisions or event announcements.
- Give on-site staff access to check-in functionality with the right permissions.

Event Analytics & ROI

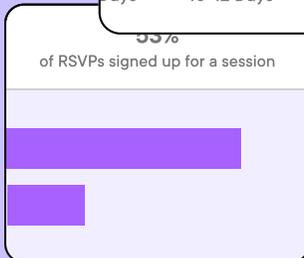
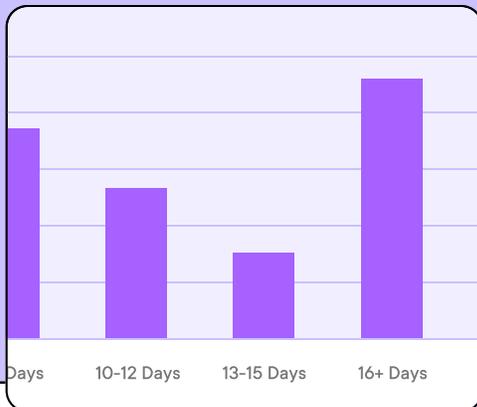
**Impacted roles
who should evaluate:**

- Executives ✓
- Program Owners ✓
- Program Implementers ✓
- Operation Managers ✓
- Designers

What good is running the perfect event if you can't prove its impact on your organization? Any technology worth investing in should provide you with a way to demonstrate success.

Choose a solution that collects data about each step in the event marketing lifecycle and exposes results in a visual way that is easy to explore and share.

<input type="checkbox"/>	Name	Email	Check-In Time
	Rick Zieme	rick.zieme@gmail.com	4:07 PM EST
	Allie Huang	ahuang@outlook.com	3:58 PM EST
	Alek Barrows	abarrows84@gmail.co	4:07 PM EST



Checklist ✓

To prove event marketing success, your event marketing platform should allow your organization to:

- Review a high-level overview of your entire events program ROI in one place.
- Visually interact with your event marketing data.
- Drill into details about your event guest list, email campaigns, ticket payouts, and event page engagement.
- Export data to a CSV and keep it in sync with CRM and MAP systems.
- Understand top-performing marketing efforts across campaigns.
- Track your event funnel from guest registration to check-in.
- Give your organization's analysts and operations teams full data access and control, while allowing view-only permissions to contributors and approvers.

Event Data Management

Impacted roles who should evaluate:

- Executives ✓
- Program Owners ✓
- Program Implementers
- Operation Managers
- Designers

You already know that executing events is only part of the puzzle. You also want to optimize programs by consistently collecting data about your events before and after they take place. By streamlining your team’s workflows, they have more time to generate new ideas and prove event program ROI.

Look for an event marketing platform that collects information while your team creates an event. By collecting data from your team over time, you’ll be able to predict and improve event specifications like budget, region, expected attendance, AV needs, and more. Remember: Lack of consistency leads to poor decision-making, so you should solve any data problems sooner rather than later.

The screenshot shows a form for creating an event. At the top, there are two tabs: 'RSVP Event' (selected with a purple checkmark) and 'Ticketed Event'. Below the tabs are several input fields: 'Title' with a placeholder 'Enter your event title', 'Domain' with a placeholder '.com', 'Event Type' with a dropdown menu 'Select an Event Type', and 'How will your guests attend?' with three radio button options: 'Virtually' (selected), 'In Person', and 'Virtually and In Person'. At the bottom, there is a 'Date & Time' section with three input boxes: '11/14/2022', '7:00 PM', and '11/15/20', with a 'to' separator between the last two.

Checklist ✓

To take advantage of internal event data, an event marketing platform should allow your organization to:

- Define an event creation flow that collects information like budget, expected attendance, or other factors.
- Automate internal data collection any time an event is created.
- Give your teams a quick wizard to automatically spin up a program based on pre-approved requirements.
- Send a post-event survey to collect retrospective information.
- Embed custom internal dashboards into the analytics section of your event marketing platform.
- Compare data from smaller events across the customer lifecycle.

The Right Deployment

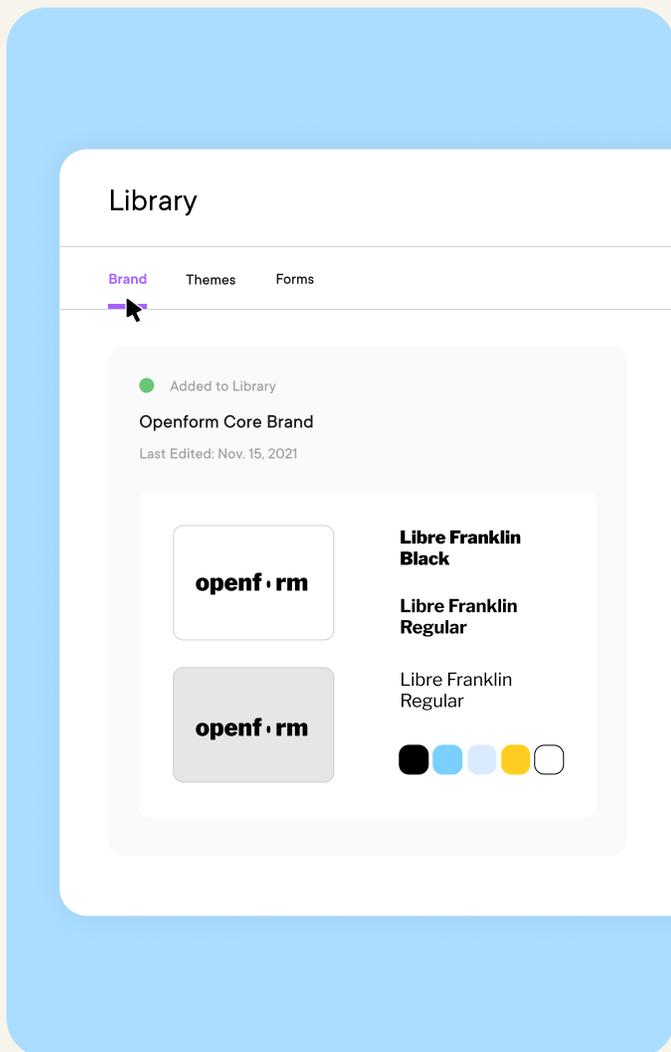
When lead flow is on the line, you need an event marketing platform that can be implemented in less than a few weeks — and one that can be administered without constant support calls. Platform integration, accessibility, ease of use, user enablement, and deployment flexibility should be top-of-mind considerations as you evaluate your options.

Scalability

Industry leaders are taking advantage of the time required to perfect an event. How? By guaranteeing that all of their event marketing efforts are scalable. Scale is the ability to grow your organization's revenue without requiring a corresponding increase in its resources, and it's a powerful thing:

- Improves the quality of leads in the room
- Increases the likelihood of those leads becoming opportunities
- Sets your revenue teams up to close more business

According to [SiriusDecisions](#), scaled event programs make up 32 percent of event budget for companies with at least \$100 million in revenue, and a staggering 55 percent for those with at least \$1 billion in revenue.



Checklist ✓

To scale your event marketing efforts, an event marketing platform should allow your organization to:

- Set up integrations once to connect your CRM and MAP systems every time you run an event.
- Create sophisticated registration forms using conditional logic and apply them to future events.
- Ensure brand consistency and governance by uploading your colors, fonts, and logos once, and applying to all your event marketing materials.
- Create and leverage email templates for registration confirmations, reminders, and any custom scenarios.
- Define KPIs once and rely on your platform to spin up visual analytics reports whenever your team runs an event.

Security & Compliance

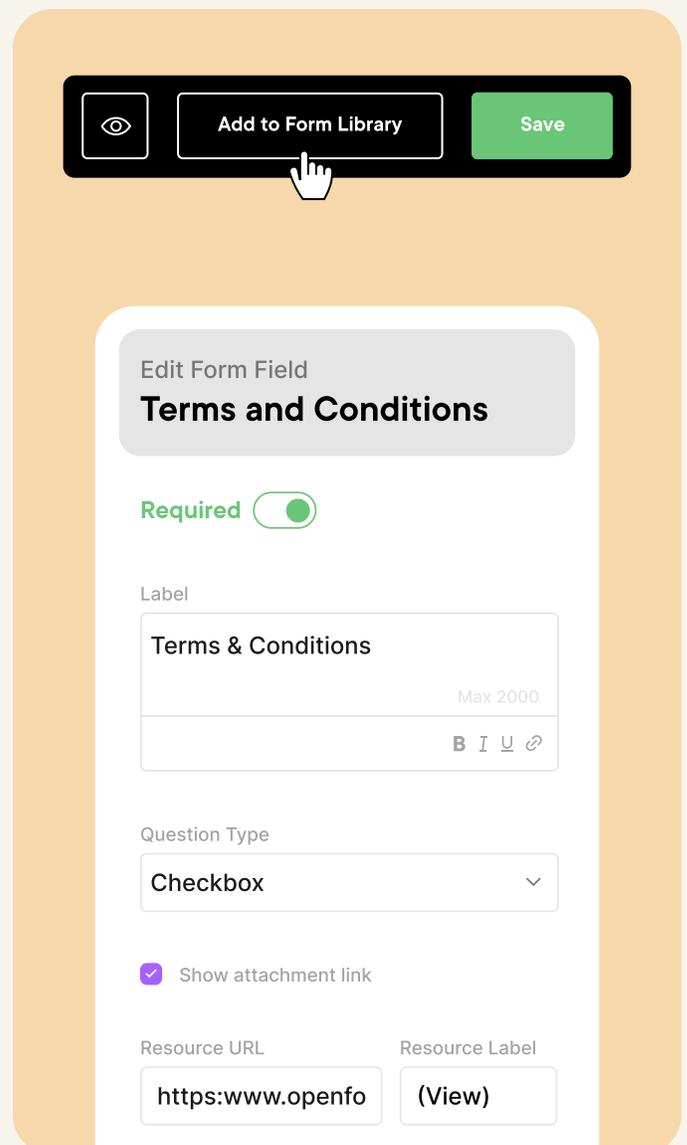
Scale doesn't stop paying off there. Data privacy laws, like [GDPR](#) and [CCPA](#), must be taken into account when marketing events. Get in front of your event data management processes by setting standards once — like adding a Terms & Conditions checkbox as part of a registration form — and reusing them whenever you create a new event.

While program implementers may want to customize every aspect of an event page, on-site hosts may only require access to a mobile app for checking guests in on-site. Choosing a platform that meets the needs of every event marketer is important, but one that meets that need gracefully (by offering multiple types of access) makes your team that much more efficient and effective.

Checklist ✓

To ensure your events are in compliance, an event marketing platform should allow your organization to:

<input type="checkbox"/>	Account for GDPR, CCPA, and other data regulations, like keeping unsubscribe data current using bidirectional integrations with your CRM and MAP software.
<input type="checkbox"/>	Capture and record opt-ins by attendee.
<input type="checkbox"/>	Share legal information based on attendee residence.
<input type="checkbox"/>	Set access levels, or permission sets, for different types of users.



Pricing & Packaging

Don't get fooled into bait-and-switch pricing. Choose a platform that is transparent with its licensing options and equipped to help you scale your programs successfully.

If your company has platform requirements that aren't specifically met, be sure to ask what customizations can be made available to you. Even better: What kind of visibility do you get, as a client, into the provider's product roadmap and feature releases?

You shouldn't get abandoned after purchase. Guarantee that implementation specialists will help set up your platform over a short time. Of course, if implementation or support teams have to hold your hand after the onboarding period, the cost and pain of your deployment rises. So, it's important that there are solid help topics and educational videos available for you and those in your organization to self-serve and answer questions in real time.

Checklist ✓

To ensure your events are in compliance, an event marketing platform should allow your organization to have:

<input type="checkbox"/>	No additional fees for integrations.
<input type="checkbox"/>	Multiple options for running virtual and hybrid events.
<input type="checkbox"/>	Free on-site check-in functionality.
<input type="checkbox"/>	Basic design control for everyone — and a deeper feature set for your team's designers.
<input type="checkbox"/>	User-friendly interface that doesn't require software expertise to get started.
<input type="checkbox"/>	Plenty of how-to resources and online documentation.
<input type="checkbox"/>	Implementation help and on-call support.
<input type="checkbox"/>	It should be clear what kind of ongoing customer support you receive. Best-in-class support organizations will offer help over the phone and by email throughout the week.

Free
For personal use and occasional small business events.

Basic
For individuals and small teams

Most Popular

Pro
For more design and access control

Enterprise
For solutions and workflows at scale

Compare plans at splashthat.com/pricing

Education & Community

Choose a platform that has a built-in community surrounding it. Your team will benefit from having access to product experts at no additional cost.

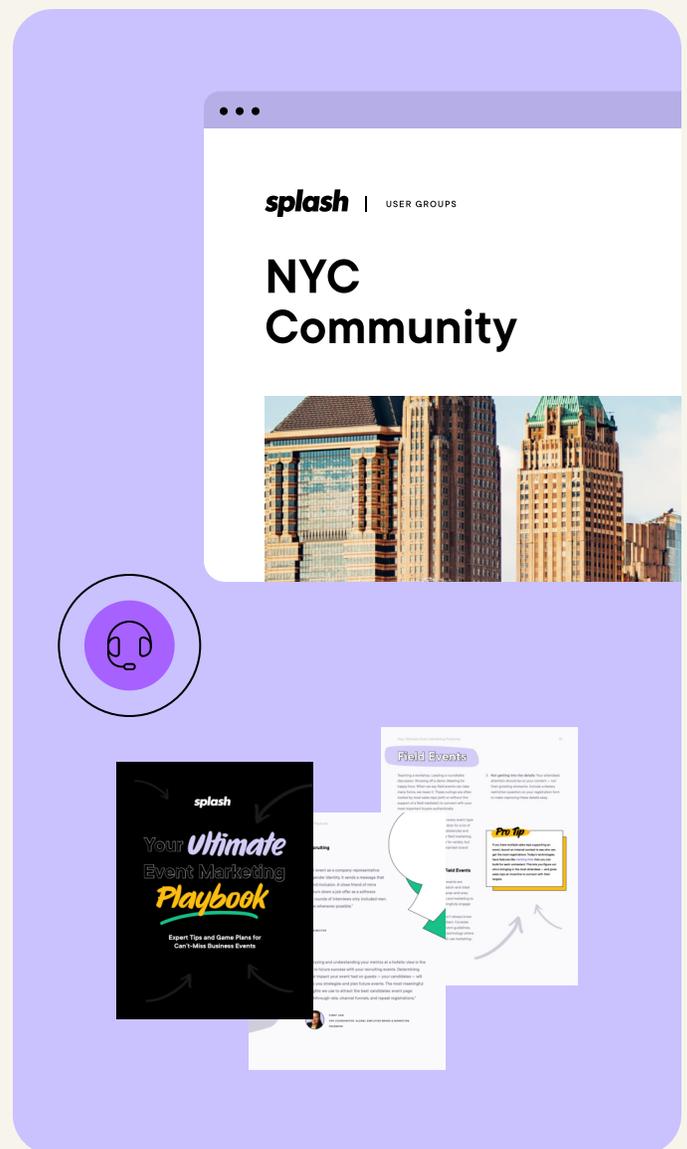
Today, software education goes beyond an online version of a printed manual. Your team should be able to answer their own questions in real time within the product, take their learning further with dynamic content online, and network with other users to increase their impact.

Adding to or changing your marketing tech stack shouldn't be painful. With the right community and learning resources, an event marketing deployment will increase the impact of your live and on-demand programs while giving your team a competitive advantage. Optimize the ROI of investing in the right software with a strong professional and educational network.

Checklist ✓

When you select an event marketing tool, choose a platform that extends beyond just its software:

- In-product onboarding and new feature announcements.
- Self-serve resources available as video and written content.
- Help Center that is regularly maintained and provides feature-level how-tos.
- User group programs that you can opt into to get pro tips and network.
- Slack channel for asking questions and sharing resources.
- In-person and virtual community gathering events for learning and education.
- Opportunities to hear from the software provider's leaders and developers.
- Customer newsletters that provide updates and assistance.

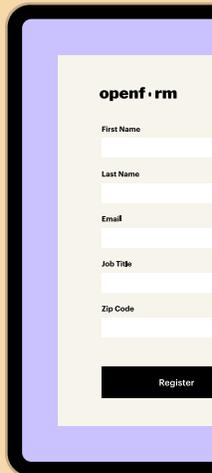


Meet Splash

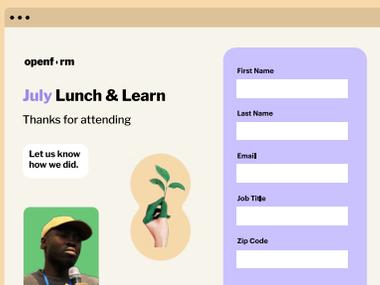
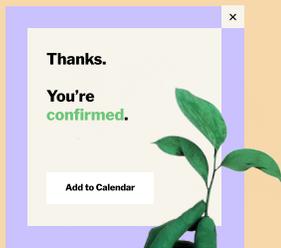
Splash is a platform championing the new era of event marketing by helping businesses market, measure, and scale their event marketing programs.

From beautiful event pages and customized registration forms, to email follow-up programs and easy integrations with other business systems, Splash empowers teams across the organization to design on-brand, measurable, and compliant event marketing programs that deliver exceptional experiences and inspire quick action on attendee data.

See why Fortune 500 companies work with Splash to scale in-person, virtual, and hybrid event programs by visiting <http://www.splashthat.com>.



Published



“Splash is the only product powerful and beautiful enough to unlock the full potential behind our experiences.”



Sam Olstein
Global Director of Innovation at GE



you there!