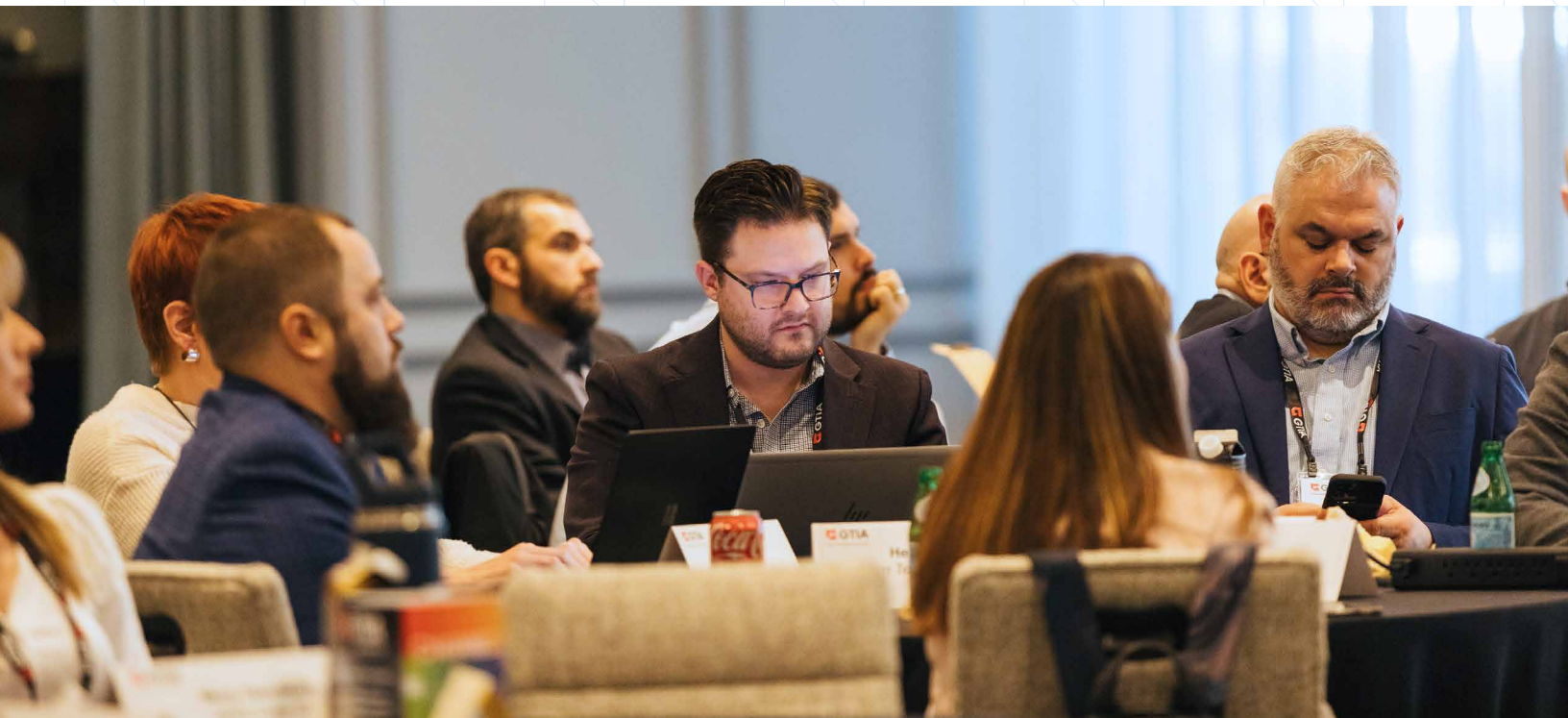


Sales & Marketing Checklist for IT Service Providers (ITSPs) Attending a Channel Event



Global Technology Industry Association



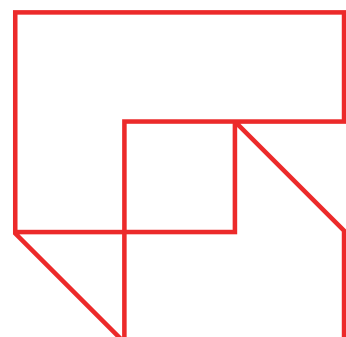
Brought to you by the
**GTIA Channel Development
Advisory Council**

Introduction

This checklist is tailored for smaller channel partners with limited resources to maximize their event experience. It focuses on networking, lead generation, and ROI while ensuring efficient planning.

Table of Contents

Which Conference to Attend	3
Travel Tips	4
At the Conference	4
Vendor Preparation	6
Mistakes to Avoid	6
Timeline for Conference Preparation	7



Conference Planning Guide

There are any number of channel and tech events—every week. No one can possibly attend every one and still manage their day job or business. So what's a prospective attendee to do? The GTIA Channel Development Advisory Council has compiled this list of tips, tricks and advice to help you choose and maximize the value from events you do attend.

Which Conference to Attend?

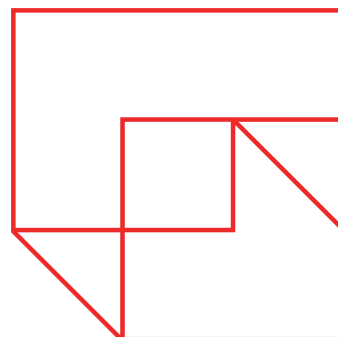
- **Channel/Tech Conference Lists – check at beginning of year and quarterly**
 - Dave Seibert's Industry Calendar
 - Channel Program
 - Tech Degenerates
 - The Tubblog
- **Budget**
 - Determine travel, hotel, meals, and conference fees
 - Regional vs national/international
 - Does your area offer grant opportunities for training?
Conference fees can be covered
 - Membership or trade association
 - Is the ticket reimbursable?
 - Hosted opportunities
 - Vendor sponsorships
 - Chart of accounts – how are you categorizing? Tax benefit?
 - Certifications offered?

- **Determine Business Goals for Conference**

- Balance between vendor pitches and educational content
- Agenda may not match your goals
- Does it match your needs/weaknesses?
- Find parity between your goals and event content. Consider stepping outside of channel events.
- Are there interesting pre-day or post event workshops?
- Identify gaps in tech or security stacks
- Identify products that may need replaced
- Do they offer different tracks? Technical, business, sales, marketing?

- **Networking**

- Who to know
- Hallway conversations
- Boardrooms
- Showing up
- Co-opetition not competition
- Mentoring/advice
- Professionalism/mutual respect



- **Business Impact**

- Loss of Productivity (negative)
- Can you be engaged or do you have to work? Are you present?
- Who should go?
- Business maturity/levelling up/ leadership
- Potential to Grow Revenue
- Gain Efficiency
- Reduce Risk
- ROI over time? (post event ripple)

- **Is it 'Fun'?**

- Is the event itself fun?
- Is there a charitable aspect involved
- Can you extend to have other 'fun' in the area?
- Where is it located?
- Family vacation extension



Travel Tips

- **Hotels**
 - Book EARLY – Room blocks fill up
 - Status Matters. Stay at the event hotel or nearby?
 - Near the Event – Some hotels are HUGE!
 - Near the Elevator
 - High Floor – Less noise
- **Cars**
 - Signup for their Loyalty program
 - Skip the Line
- **Flights**
 - Straight Flights
 - Exit Row
 - Premium
- **Points/Points and More Points**
- **Survival Kit**
 - Medication
 - Adhesive bandages
 - Hydration drinks/supplements
 - Antacids
 - Gum
 - Water bottle
 - Sewing kit
 - Snacks

At the Conference

- **Clear your Calendar**
 - Don't try to work from the event, you will miss out on great content
- **Check-in**
 - Colored lanyards
 - Name on both sides
 - Back-side agenda printed upside down
 - Grab a hotel map
 - Rooms often in alphabetical order
- **Breakfast Options**
 - Meals are a great way to meet new people
- **Keynotes**
 - Host Keynotes generally contain important announcements and roadmaps
 - Motivational Keynotes generally change your thinking in a positive way
- **Use the App**
 - Plan your calendar
 - Fill out the surveys! It's nice to know presenters did well, but constructive feedback is also welcome
 - Find People to setup in-person meetings with. Choose those you would not normally have an opportunity to meet with

- **Attending Sessions**

- Pick Sessions in advance
- Be early to get a spot
- Have a backup session in mind
- Front or back depends on Q&A intentions
- Bring cards to leave with presenters (with a space to write on them!)

- **Vendor Pavilion**

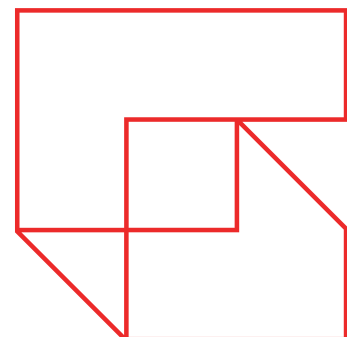
- Plan to spend at least a few minutes with each vendor to learn about new offerings
- Thank the vendors for being there, they cut the price of attendance by at least half
- Build relationships with the vendor reps
- Sometimes the best gold is in the back row
- Swag management
- Take the swag. Vendors generally do not want to ship it home.
- Getting it home
 - Too much weight? – Ship it!
 - Only have a carry-on – Ship it!
- What to do with it
 - Spouse picks
 - I pick
 - Kids pick
 - Take it to the office. Dump it on the table and ask questions about your offer, contract, etc., and right answers get first pick!
- Don't be creepy
- Bring business cards (with a space to write on them, for entering drawings with few entries, winning percentages are high)

- **Parties**

- Official parties
- Claim a space to sit/table early
- Food
- Booze management
 - Bar placement
 - Drink tickets (vendors)
 - Don't be 'that guy'
- After parties
- Do attend and work on those vendor relationships
- Business is done in the bar after hours
- Real issues are discussed and often solved

- **Post Event**

- Compose emails to collected business cards
- Schedule vendor follow-up with your team
- Shiny object syndrome



Vendor Preparation

- Identify products you're interested in
- Identify gaps in your tech or security stack
- Identify products that may need to be replaced or removed from your stack
- Identify vendors that may match those gaps
- Do your due diligence on the vendor ahead of time
- Connect with reps from vendor companies on LinkedIn you are interested in
- Message them on LinkedIn or the event app. Make an appointment to chat, even if briefly
- Come prepared with a few vetting questions for the vendors to determine if it's worth a demo

Mistakes to Avoid

- Came back with 20+ things to do (seagulling)
- Not preparing or using time well
- Bringing the wrong people to the event
- Not having goals for the event



Timeline for Conference Preparation

12 Weeks Out

Sales Tasks:

- Identify key vendors, distributors, and other partners you want to connect with.
- Research event agenda, sponsor booths, and networking opportunities.
- Define objectives: Are you looking for new vendors, tech solutions, business partnerships, or client acquisition?
- Register for the event early to secure discounts and special access.
- Determine budget for travel, lodging, and event expenses.

Marketing Tasks:

- Develop a plan to promote your presence (social media, email, blog, LinkedIn posts).
- Decide if you will host meetings, attend vendor dinners, or join networking sessions.
- Secure any required travel arrangements (flights, hotels, ground transportation).
- Set up event notifications and subscribe to updates from the event organizer.

8 Weeks Out

Sales Tasks:

- Reach out to vendors, potential partners, and key contacts to schedule 1:1 meetings.
- Finalize team members attending and assign roles (meeting scheduler, lead collector, etc.).
- Research vendors/exhibitors to identify must-visit booths.
- Create a list of questions for vendors regarding solutions and partnerships.

Marketing Tasks:

- Start promoting your attendance on LinkedIn and other social platforms.
- Engage with event hashtags, organizers, and speakers on social media.
- Prepare a one-page company overview (printed/digital) to share with vendors.
- Order business cards (or set up a digital card with a QR code to exchange contacts).

6 Weeks Out

Sales Tasks:

- Follow up on meeting requests; confirm key appointments.
- Research new trends and session topics to attend.
- Identify networking events, happy hours, and after-hours opportunities.

Marketing Tasks:

- Launch an email campaign to clients/prospects letting them know you'll be at the event.
- Finalize promotional assets (LinkedIn banners, email signatures, blog post).
- Plan post-event follow-up strategy (email templates, call scripts, CRM entries).

4 Weeks Out

Sales Tasks:

- Double-check scheduled meetings and fill any gaps with additional outreach.
- Start engaging with event-related social media discussions.
- Plan your elevator pitch to quickly explain your business to vendors.
- Ensure you have a clear "wish list" of solutions and partnerships you're seeking.

Marketing Tasks:

- Create social media posts teasing key meetings or sessions you'll attend.
- Prepare an event recap template to use post-event.
- Finalize and test lead capture methods (CRM, business card scanner, forms).
- Print promotional materials if needed (flyers, brochures).

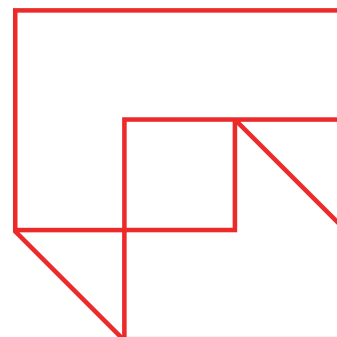
2 Weeks Out

Sales Tasks:

- Confirm all scheduled meetings and add final networking opportunities.
- Research competitor attendees and potential partnership opportunities.
- Rehearse key talking points for vendor discussions.
- Finalize logistics (transportation, lodging, itinerary).

Marketing Tasks:

- Push last-chance social media posts to boost engagement.
- Schedule automated LinkedIn posts to go live during the event.
- Confirm team roles for capturing notes and leads at the event.
- Pack everything needed for the event (chargers, business cards, promo materials).



1 Week Out

Sales Tasks:

- Send reminder emails to vendors and partners you're meeting with.
- Confirm team schedules and ensure all responsibilities are clear.
- Download the event app (if applicable) and review the latest schedule.
- Review last-minute meeting opportunities with vendors and distributors.

Marketing Tasks:

- Schedule social media posts for the event period.
- Test and ensure CRM or lead capture tools are working.
- Confirm and pack all materials needed for the event.

Day of Event

Sales Tasks:

- Arrive early and check in.
- Attend scheduled meetings and take detailed notes.
- Network with vendors and industry peers.
- Collect and organize business cards and contacts.
- Take photos with vendors and partners for post-event content.

Marketing Tasks:

- Engage in real-time social media posts (tag vendors, use event hashtags).
- Capture testimonials or insights from vendor conversations.
- Keep track of key takeaways from sessions for post-event content.
- Ensure team members rotate to maximize booth visits and networking.

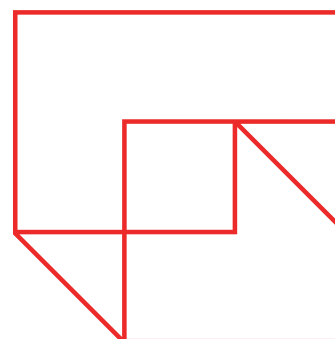
24 to 48 Hours Post-Event

Sales Tasks:

- Follow up with top-priority leads/vendors (thank-you emails, LinkedIn messages).
- Organize all collected business cards and input them into the CRM.
- Send personalized follow-ups with next steps to key contacts.
- Share key learnings with the team.

Marketing Tasks:

- Publish an event recap on social media or a blog post.
- Share photos and tag attendees/vendors in LinkedIn posts.
- Analyze social media engagement and track new followers/connections.
- Begin tracking any immediate ROI from the event.



1 Week Post-Event

Sales Tasks:

- Continue outreach and nurturing for leads that haven't responded.
- Schedule demo calls or deeper discussions with interested vendors.
- Ensure all event-related interactions are logged in the CRM.

Marketing Tasks:

- Evaluate event success: What worked? What didn't?
- Identify which vendors, technologies, or partnerships are worth pursuing.
- Draft an internal event report summarizing key learnings and outcomes.

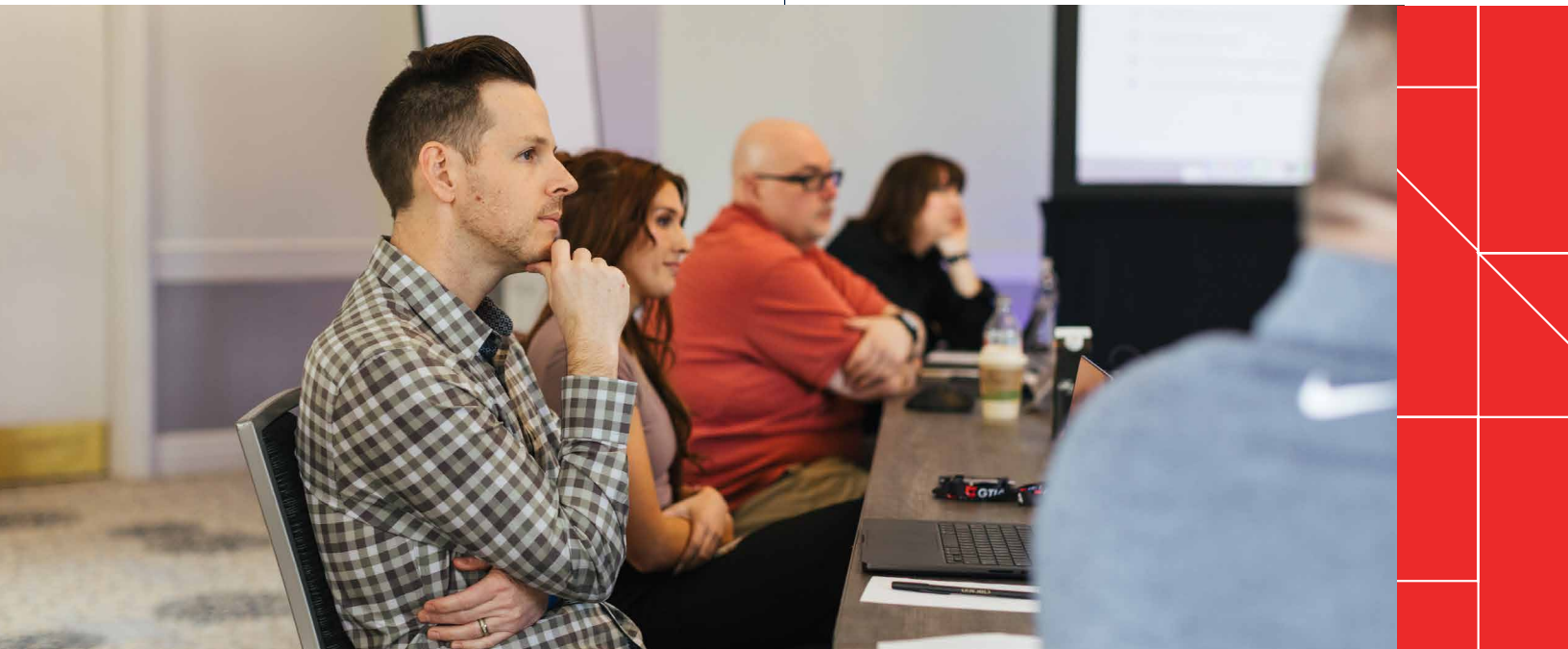
2 to 6 Weeks Post-Event

Sales Tasks:

- Track vendor relationships and partnership opportunities.
- Monitor deals or solutions that resulted from the event.
- Stay engaged with event contacts via LinkedIn.

Marketing Tasks:

- Assess final ROI and lead conversion rates from the event.
- Plan for the next industry event based on lessons learned.
- Share any event-related case studies or insights with customers.



About the Channel Development Advisory Council

The GTIA Channel Development Advisory Council, made up of executives from across the industry, shares its expertise and experience to develop programs, tools and other IT channel resources.

GTIA Advisory Council members are appointed and serve as advocates and educators to accelerate the adoption of technology solutions. Advisory councils shape how GTIA members embrace critical issues and opportunities in the channel and help us look to the future.



Global Technology Industry Association

gtia.org

Copyright © 2025 GTIA. All Rights Reserved.

The Global Technology Industry Association (GTIA) is the only vendor-neutral 501(c)(6) non-profit trade association connecting the worldwide community of companies in the IT channel. The association's mission is to help its members build secure, sustainable, profitable businesses in an ever-changing technology landscape by providing philanthropy, resources, networking opportunities and industry standards. Internationally, GTIA represents tens of thousands of professionals from more than 2,000 MSPs, solution providers, vendors, distributors, and other organizations serving the IT channel. For more information, visit gtia.org.