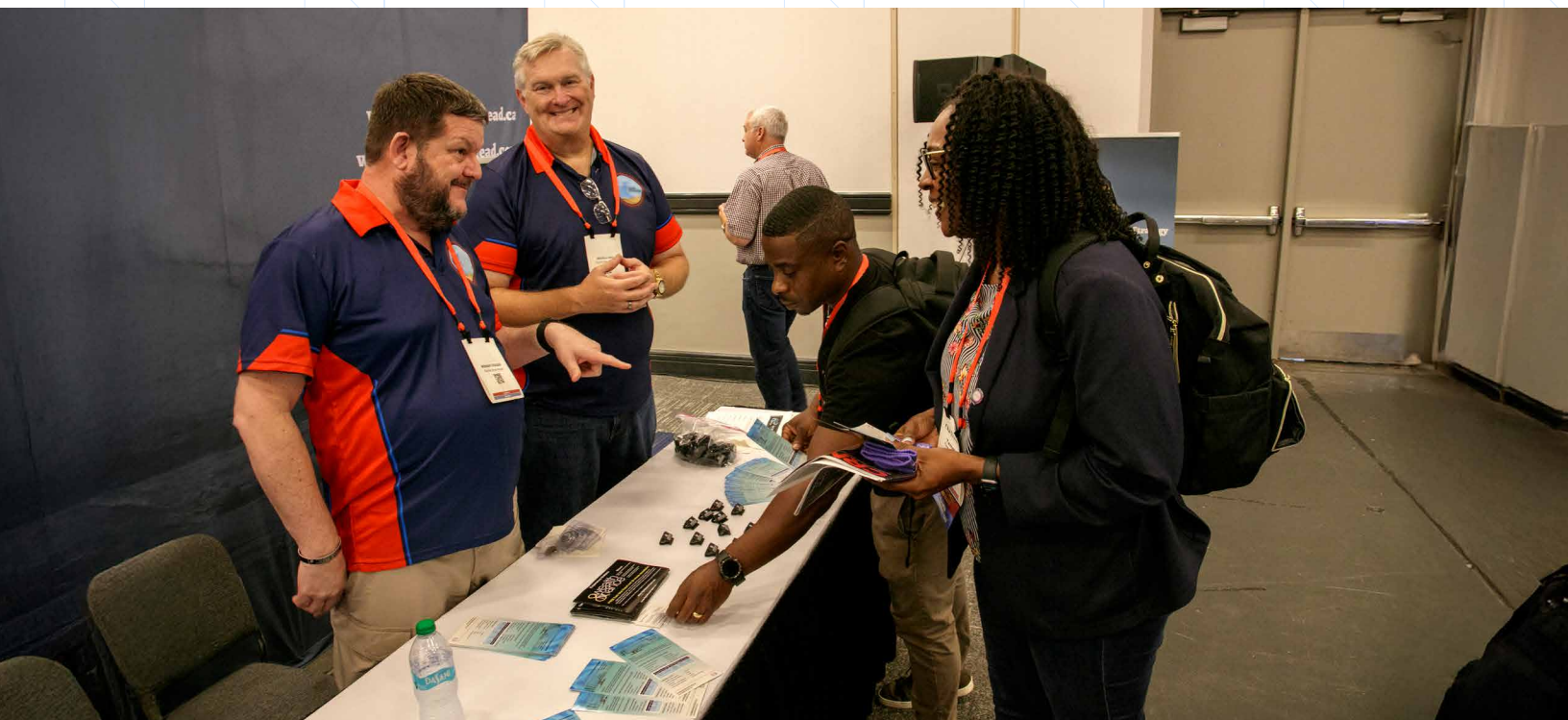


Sales & Marketing Checklist for Technology Vendors Attending a Channel Event



Global Technology Industry Association



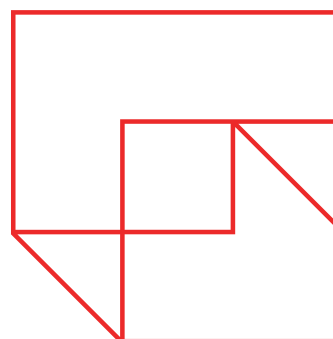
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**GTIA Channel Development
Advisory Council**

Introduction

This checklist is tailored for technology vendors to maximize their experience with IT service providers, MSPs and other partners at channel events. It focuses on sales and marketing tasks at various checkpoints before, during and after the event.

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Prior to the Event

12 Weeks Out

Sales Tasks:

- ☐ Help identify target audience and pain points.
- ☐ Create VIP invite list.
- ☐ Define ideal partner profile to qualify event engagements.

Marketing Tasks:

- ☐ Define event KPIs (leads generated, pipeline revenue, engagement rate).
- ☐ Create event campaign for tracking purposes in marketing automation software.
- ☐ Build messaging, promotional strategy, and event landing page (if applicable).
- ☐ Secure venue and confirm logistics (catering, AV, booth setup).
- ☐ Track goals and create a project plan.
- ☐ Define objectives and ROI parameters.

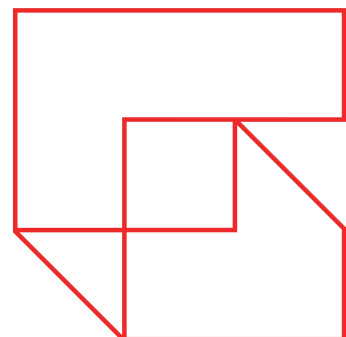
8 Weeks Out

Sales Tasks:

- ☐ Send out VIP invitations and start scheduling meetings/demos, any lunches or dinners, happy hours, etc.
- ☐ Collaborate with marketing on audience segmentation and outreach.
- ☐ Log all VIP touchpoints in the CRM.

Marketing Tasks:

- ☐ Finalize event branding and messaging.
- ☐ Launch the event landing page and begin collecting registrations (if applicable).
- ☐ Develop initial email campaigns, social media ads, and paid ads (if applicable).
- ☐ Begin coordination with logistics vendors (booth, materials, signage).
- ☐ Begin to create slide deck for any stage presentations or demos at the booth.
- ☐ Begin lead scanning tool integration into CRM.
- ☐ Order staff t-shirts for attendees.



6 Weeks Out

Sales Tasks:

- ☐ Follow up on VIP invites and continue nurturing relationships.
- ☐ Track all communications and meeting confirmations in the CRM.
- ☐ Target priority leads for outreach and scheduled meetings.

Marketing Tasks:

- ☐ Launch first wave of email campaigns and drip campaigns.
- ☐ Begin paid social ads targeting high-priority audience segments (if applicable).
- ☐ Start content marketing (blog posts, video promotions, social posts) (if applicable).
- ☐ Confirm logistics, including booth setup details, signage, lead-scanning tools, and shipping.

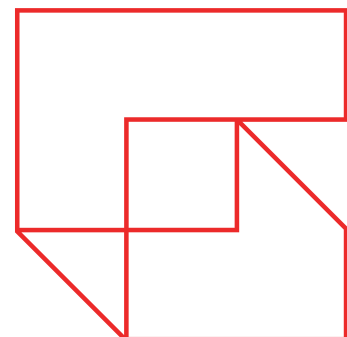
4 Weeks Out

Sales Tasks:

- ☐ Revisit unresponsive VIPs and send follow-ups.
- ☐ Ensure VIP invitations include scheduled activities (dinners, demos).
- ☐ Log scheduled meetings in CRM.
- ☐ Conduct warm-up calls for top prospects.

Marketing Tasks:

- ☐ Push reminder emails to those not registered yet.
- ☐ Ramp up social media campaigns (use countdowns, exclusives like giveaways).
- ☐ Finalize booth materials, giveaways, and lead-scanning plans.
- ☐ Finalize content creation for social and blog.
- ☐ Secure any final logistics like booth setup times.



2 Weeks Out

Sales Tasks:

- ☐ Re-confirm meetings with VIP prospects.
- ☐ Schedule final calls or personal outreach to unresponsive leads.
- ☐ Finalize post-event follow-up strategy.
- ☐ Document all final pre-event engagements in CRM.

Marketing Tasks:

- ☐ Launch final reminder emails for registration and push final social campaigns.
- ☐ Ensure all booth materials, signage, and scanning tools are ready.
- ☐ Confirm shipment of materials to the venue.
- ☐ Schedule booth setup team and create staff schedules.
- ☐ Finalize content for day-of-event updates (social, blog).

1 Week Out

Sales Tasks:

- ☐ Confirm all scheduled meetings with VIPs.
- ☐ Ensure follow-up meetings are set and logged in CRM.
- ☐ Start mapping out a detailed post-event strategy for hot leads.

Marketing Tasks:

- ☐ Send pre-event email campaign (reminders, schedule, VIP offers).
- ☐ Prepare for live social media coverage during the event.
- ☐ Ensure booth setup team is briefed and ready.
- ☐ Finalize and confirm shipping of all materials (signage, giveaways).
- ☐ Schedule booth staff and assign lead scanning roles.



During the Event

Sales Tasks:

- ☐ Engage with attendees at the booth and scan leads. (separate blog post)
- ☐ Conduct pre-scheduled meetings with VIPs and prospects.
- ☐ Ensure all leads are entered into CRM in real-time.
- ☐ Note and prioritize any hot leads for immediate follow-up.
- ☐ Prioritize networking events and activities and define roles and responsibilities for staff.

Marketing Tasks:

- ☐ Oversee booth setup and logistics.
- ☐ Capture live event content (photos, videos, social media updates).
- ☐ Promote event activities through live social posts and hashtags.
- ☐ Ensure lead scanners are functioning and integrated with CRM.
- ☐ Ensure booth staff is rotating and handling all attendee interactions effectively.



After the Event

24 to 48 Hours Post-Event

Sales Tasks:

- ☐ Follow up immediately with VIPs (within 24 hours).
- ☐ Prioritize hot leads for follow-up (within 48 hours).
- ☐ Start scheduling meetings with hot leads.
- ☐ Document all follow-ups and outcomes in CRM.
- ☐ Ensure all key VIP engagements are noted for continued nurturing.

Marketing Tasks:

- ☐ Send post-event follow-up emails with thank-yous, key takeaways, session recordings.
- ☐ Share event highlights and success stories on social media.
- ☐ Collect all attendee data and cross-check it with lead scanners and CRM.
- ☐ Reconcile event budget and track early metrics for ROI.

1 Week Post-Event

Sales Tasks:

- ☐ Continue following up with leads that weren't responded to within 48 hours.
- ☐ Begin lead nurturing for any cold leads.
- ☐ Schedule sales team reviews for all post-event lead progress.
- ☐ Continue logging activities in CRM.

Marketing Tasks:

- ☐ Review post-event engagement metrics (social, email responses, replays).
- ☐ Prepare case studies or blog posts to highlight key event success.
- ☐ Begin ROI analysis using registered attendees and tracked engagements.
- ☐ Hold internal post-mortem meetings to assess the event's overall success.

2 to 6 Weeks Post-Event

Sales Tasks:

- ☐ Monitor lead progression through the pipeline and track conversion rates.
- ☐ Report regularly on deal stages from event leads.
- ☐ Push unresponsive leads into nurturing workflows (emails, calls).
- ☐ Continue CRM documentation of every contact, lead score, and deal progression.
- ☐ Share closed deals with marketing and update pipeline tracking.

Marketing Tasks:

- ☐ Track performance metrics (leads converted into opportunities, opportunities to closed deals).
- ☐ Continue tracking the impact on revenue and lead scoring.
- ☐ Finalize post-event ROI reporting, using data from CRM and marketing automation tools.
- ☐ Hold post-mortem meetings to assess the event's overall success.



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