Event Planning Guide for Salesforce ISV Partners

Hosting events as a Salesforce Partner can increase engagement, nurture relationships, and close deals. Use this guide as your go-to resource for planning large ancillary gatherings, small customer roundtables, and everything in between.

- 78% of organizers identify in-person events as their organization's most impactful channel. (Bizzabo, 2025)
- 77% of consumers say their trust increased somewhat or a lot following their interaction with a brand at a live event. (Freeman, 2023)

In This Guide

Developing Your Event Strategy

Whether you're aiming to generate leads, deepen customer relationships, or launch a new product, a robust strategy will ensure your event aligns with your business objectives while successfully engaging your audience to create meaningful connections.

Establish Your Goals and Success Measurements

- What goal are you aiming for? Think about brand awareness, pipeline generation, acceleration, or closure. Which event format will help you achieve it?
- Is your sales team ready for audience acquisition and post-event follow-up where needed?
- What impression, content, or key takeaway do you want attendees to have? How will you shape that experience?
- What actions do you want attendees to take after the event?
- How will you measure short-term (e.g., attendance) and long-term (closed business, brand lift) success?

What's Your Goal?

Brand Awareness: You want to get your name out there and show Salesforce (or the event host) that you're deeply invested in the partnership.

PRO TIP
Update your marketing collateral and AppExchange and AgentExchange listing. Prospects, partners, and Salesforce employees you connect with are likely to look more closely at your company after the event.

Lead Generation: You want to attract prospects who align with your target market – right buyers, right industry, and right use cases.

PRO TIP
Identify key prospects or customer segments and reach out to them before conferences or large events to set up meetings. This will help you maximize your time and ensure you connect with the right people.

Relationship Building: You want to ensure you can meet with important prospects, customers, and partners in person and have multiple, meaningful conversations in a short period. Most large-event attendees have full agendas, so connecting in advance to confirm a date, time, and location to meet is key to building those relationships early.

PRO TIP
For conferences and large gatherings, develop a clear strategy for networking. Prepare a list of key contacts you want to meet and have a plan for engaging them. Consider hosting a small reception or ancillary event (see Hosting Ancillary or Stand-Alone Partner Events) to facilitate these connections.

Deal Acceleration: You have significant opportunities in your sales pipeline, and an event is a perfect time to advance these deals. Identify attendees who are part of the buying committee and schedule meetings to demonstrate your value. Work with your sales team to identify key opportunities where event attendance can make a difference. Enable the sales team with templates and necessary materials to reach out to these contacts to set up meetings or experiences.

PRO TIP
Work with your sales team to bring loyal, happy customers together with top late-stage opportunities while at a joint event. A curated evening experience is a great way to connect your strongest references with prospective buyers in a casual and fun setting.

Define Your Target Audience

- What attributes make up the ideal customer profile for this event? What industry are you trying to reach?
- What is the ideal buyer's journey? What messaging and content will align to each step?
- What criteria will you use to determine if a lead is hot? What are your service-level agreement (SLA) timelines and protocols for regular contacts and hot leads?

Define Your Audience Acquisition Strategy

- What's your event's unique value? Why should attendees take time out of their workday or an evening for this event?
- What's the right channel to reach your audience? Email and social media campaigns for larger events? Personalized email for a more intimate event or for strategic accounts?
- Have you mapped your list with the target audience you're trying to reach? Do you have the correct information and the right personas?
- Is your pre-event audience engaged? Do you have a follow-up strategy that includes reminders to avoid drop-off?
- Are you using existing Salesforce sales relationships to help you get more internal visibility?
- Are you working with your Salesforce Partner Account Manager to help drive internal awareness and map your opportunities?

Determine Your Resource Requirements

- Is your budget aligned with your goals and expectations?
- Do you have staff or people resources to plan and deliver on events?
- Have you included key staff travel expenses, including speakers, in your plan?

Do you have secure buy-in from appropriate leadership to ensure experts prioritize your event in their schedules?

Consider Your Content

Is your event content strong enough to warrant your target audience prioritizing your event over their long to-do list?

PRO TIP

Make the most of Partner Co-Marketing assets to support your event.

Ideas to Ensure Your Event Stands Out

Social Push or Press Release Tie-In [1]

New Product or Feature [2]

Industry Research Report [3]

[1] Use your event's buzz to amplify major social pushes or press releases. Share the latest news and updates during your event to spark engaging conversations and meaningful interactions with your company. This not only keeps attendees informed but also positions your brand as a leader in the industry, fostering a deeper connection with your audience.

[2] Showcase what's new and exciting. Demonstrate how your latest innovations can transform your audience's business.

[3] Unveil cutting-edge research that provides valuable insights and trends. Position yourself as an industry thought leader.

Working with Salesforce Speakers

Looking to add an expert voice to your event? Your Salesforce Partner Account Manager can help match the right Salesforce speaker to your event's topic, timing, and priorities. While we can't guarantee a speaker, we're committed to supporting you in making your event a success.

Step 1: Share Your Goal

Owner: Partner

Create an overview of what you're trying to accomplish to share with your Salesforce Partner Account Manager.

- Audience
  - Will media or analysts also be attending?
- Run of show
- Title and abstract
- Date, time, and location
- Ideal Salesforce speaker(s)
  - Is a speaker bio and headshot needed?
  - What message should the speaker deliver?
- Other session speaker(s): name, title, company
- Detailed timing and flow: air date, rehearsal, meet-and-greet to discuss topics
- Speaker day-of call time
- Total minutes for each speaking session
- Slide requirements (if any)
- Q&A (Y/N)
- Event link (if part of a larger conference)
- Hashtags (if promoted on social)
- Recording
  - Will a recording be publicly distributed?
  - Will Salesforce get a copy?
  - How are you planning to reuse the recording? (Think about ways to package the session as evergreen content.)

Step 2: Source the Speaker

Owner: Salesforce Partner Account Manager

- Contact and ask the Salesforce speaker to complete the **#external-speakingrequest Slack form**.
- Provide the speaker's headshot, bio, and availability to partner contact scheduling.

Step 3: Prepare the Speaker

Owner: Partner

- Create a pre-event content package for the speaker to review before the session.
  - Company overview
  - Partnership overview
  - Product videos, infographics, or briefs
- Share assets to promote the session on social.
- Schedule a meet-and-greet as soon as your speaker is confirmed.
  - Introduce all speakers
  - Introduce the session overview and intent
  - Review the proposed run-of-show guide and ask speakers if they have any modifications
- Practice or hold a tech rehearsal meeting at least one day before the event.

Step 4: Follow Up with the Speaker

Owner: Partner and Salesforce Partner Account Manager

- Thank the speaker for their contribution and ask for their feedback.

Sponsoring Events

Event sponsorships enhance your visibility, build brand awareness, and connect you with key Salesforce stakeholders. Whether you're sponsoring a Salesforce-hosted event or a third-party conference, these best practices will ensure your sponsorship delivers meaningful results.

For Dreamforce best practices, review our supplemental guide, Make the Most of Dreamforce for ISV Partners.

Booth

Your booth is your official home for the event and is the visual representation of your company and brand.

Before

- **Choose Your Staff:** Staff your booth with polished, professional, and friendly people who are passionate about your company, products, and services.
    - Demo leads: One or two solution engineers or product managers is ideal (depending on the size of the event).
    - Crowd-pullers: One or two marketing team members or sales development reps can help pull people in.
    - Non-booth attendees: Key sales reps, your sales leader, or your partner marketing lead can help fill booth spots but also should be free to join customer sessions and network.
    - Booth manager: This person keeps everyone on a schedule and the booth clear of clutter, communicates with reps and executives who have someone stop by the booth, sets up and troubleshoots Wi-Fi, charges your scanners at the end of the night, and locks up your cabinet.
- **Create a Schedule:** Create a booth schedule so everyone knows where to be and when. Ensure your team knows to get there early with plenty of time to check in, get through security, pick up any scanners, and set up your booth before the event floor opens to the general public.
- **Prepare Your Team:** Host one or more prep meetings with your entire event team before the event to get everyone up to speed on the goals, messaging, and expectations. Consider going over:
    - Event overview and prospectus information, including how many people, roles, industries, and personas you can expect
    - Preferred hotel and travel arrangements
    - Scan, brand awareness, meeting, and other event goals
    - Clothing or uniform for the event
    - Booth overview, including what the message is, what it looks like, where it's located, and what you're giving away and to whom
    - Messaging and demo talk track
    - Plan of attack for different visitors, such as what to do with an upset customers wanting support, a hot prospect looking for immediate help, or a customer looking for someone specific
    - Expectations, including arriving on time, being well rested, keeping the booth clean, and staying for the entire shift
    - WhatsApp or Slack group for the onsite team

Before (Continued)

- **Prepare and Design Your Booth:**
  - You have 10 seconds to grab attendees' attention, so create a bold, inviting, interactive experience. Avoid white-only backgrounds and colors that clash. Ensure your messaging is clear.
  - Understand the space you have to create your message in your booth. Space is limited, so have a design that makes it easy for someone to get what you do in a matter of seconds. If you don't have a strong in-house design team, hire professionals.

    PRO TIP
    Use Partner Co-Marketing promotions that include written content, such as co-branded customer stories.

  - Answer "what we do" clearly and simply. (Less text is better.)
  - Prioritize demos; nothing sells your solution like seeing it in action. The goal of anyone pulling someone into your booth should be to get that person interested enough to engage in a demo.
    - Come to the event with a polished one- to three-minute demo and demo script that is familiar and practiced.
    - Always have a backup demo plan uploaded.
    - When there's no live demo taking place, have the demo video or a marketing video running so there's never a blank screen.

      PRO TIP
      Use Partner Co-Marketing promotions that include video creation, such as a product demo or "60 Seconds with" video.

    - Prep your whole booth team on the demo flow and talk track.
  - With your customers' permission, incorporate their success into your materials. Include customer stories in your talk tracks, solutions sheets, video, and follow-up.
  - To avoid paper waste, have a QR code on your booth or available for prospects to scan. That QR code should take them to a landing page or something like Highspot where they can access demo videos, solution sheets, case studies, and contract information.

- **Promote Your Attendance:** If you've invested in a booth, use it to promote to your customers, prospects, and partners about your partnership and the opportunity to connect with them.
  - Send an email (or two) to customers and prospects announcing your sponsorship and attendance. Include where you'll be located (with your booth number) and what you plan to show or demonstrate. Ask if they're attending and offer personal demos or meetings. Even if the contact isn't attending the event, this opens an opportunity for them to set up a meeting outside the conference.
  - Create a social media plan for your onsite team, and have a team back home ready to post, share, and assist in promotion. Determine whether you want team members to share from their account, share photos with the corporate social lead, or another route.
  - Schedule one-on-one meetings with top prospects in advance.

- **Identify Your Follow-Up Plan:**
  - Choose how you will classify the contacts you receive at the event, for example, session attendees, booth visits, executive meetings, and hot or urgent leads.
  - Outline a follow-up plan that's appropriate for each contact type. Interlock with key stakeholders and set up appropriate nurture tracks to ensure you have the next steps to meet your desired attendee experience and outcome.

During

- **Set Up Your Booth:** Have a team or at least one main person in charge of setting up the booth before the doors open. This should include:
  - Picking up the scanner
  - Setting up a basket of goodies for the team (in a cabinet or tucked away)
  - Setting up swag or giveaways
  - Setting up the screen, connecting to the internet, and testing videos or demos
  - Setting up iPads if you have them and making sure they're charged
- **Capture Qualified Leads:** Have a lead-scanning strategy, and if you have the option, set up your questions or personalization inside your scanner. Capture clear notes detailing next steps for a colleague to follow up appropriately from this connection. Write key conversations down in a notebook if you don't have note abilities in your scanner.
- **Leverage the App:** Take advantage of the event app, like the Salesforce Events app, to discover relevant sessions, engage with attendees, and access all event information.
- **Include Call-to-Action Options:** If a prospect is interested but doesn't want a demo, have a second call to action. Can you schedule time with them on the spot with an iPad? Can they scan a QR code to access collateral and content after the show? Have experts available to meet with highly qualified prospects immediately.
- **Look Around:** Take time to walk the floor and see how competitors and others are positioning themselves.
- **Attend Customer or Prospect Sessions:** If you have customers, prospects, or partners speaking, have someone from your team sit in on the session, take notes, and stay after to meet and engage with the speaker. Share the notes, quotes, and highlights with the sales team member who owns the account so they can do a personal follow-up.
- **Walk the Walk:** Use your own products in the booth, if applicable.

After

Follow Up: Implement your follow-up strategy in a timely and accurate manner. Follow up with your entire team with all the information you collected at the event, sharing leads and key information.

- For a detailed post-event follow-up strategy, please review Following Up.

Speaking Sessions

Sessions featuring a diverse set of speakers are great ways to get exposure to a wider audience, helping you build credibility and position your product as a market leader.

Before

- **Choose Your Speakers Wisely:** Your session speakers should be energetic and passionate, be experts in the topic, and feel comfortable talking in front of a crowd.

- **Talk About What You Know:** Choose a topic where your speakers and your company are experts. How can your session benefit this audience?

- **Make It Professional:** If you're sharing slides, make them professional, beautiful, and easy to read. Use more images and fewer words.

- **Practice:** Make sure your speakers time themselves and practice in front of others. Ask for feedback; test out the stories and reactions. Leave enough time for Q&A. Build in time after the session to meet with engaged individuals.

- **Keep It Fun:** Use an engaging speaker. Keep it interactive. Pause for moments of audience engagement. Tell stories and make them relatable. Include demos where possible.

- **Build Excitement:** Promote your session ahead of time through marketing campaigns and in your booth. Do a roundup 20 minutes before your session starts, tease your session on social media, and make sure your sales team is telling prospects and customers who are attending the event about the session.

- **Make It Actionable:** Offer clear takeaways for the audience, and include a call to action at the end.

- **Collect Your Leads:** If the speaking session is part of your event package and you're entitled to scan your leads, ensure a staff member will be available to scan attendees. This is the only way to receive the attendees' contact information.

During

- **Use Social Media:** Promote your session on social media, including speaker and crowd pictures. Highlighting a product or Salesforce team in your session? Mention them on social. Speaking with a customer? Mention them on social media as well.

- **Include Your Team:** Attendees are interested in your topic, so have a few team members at the session to ask attendees what brought them there and encourage them to visit the booth to learn more.

- **Thank the Audience and Your Hosts:** Thank attendees for taking time out of their schedule, and have a way for them to follow up. Include your speaker's LinkedIn URL, X handle, or a QR code on a slide.

After

Get the Most Out of Your Content: Include your session deck in the content section of your AppExchange or AgentExchange listing, and share it as a follow-up touchpoint for leads.

Outside Connection

- **Book the Fun Stuff:** While your alliances team is setting up meetings and securing space to have those conversations, book and make reservations for other meals or ancillary events (happy hours, keynote viewings, etc.) you would like to host for customers during the event timeline.

Hosting an informal gathering, happy hour, or executive dinner? Play Partner Co-Marketing co-branded content or any other videos you've created for the event on a large screen to create a customized feel.

- **Book Meeting Space Early:** Meeting room space is limited. Work with your alliances team to make sure you're familiar with how to book meetings during the event or set up your own process. Don't forget to make restaurant reservations ahead of time, too. If your organization has local office space, take advantage of it.

- **Review Public Relations:** If you're planning any PR activity, review the Partner PR guidelines. Lead with customer stories or product announcements.

Hosting Ancillary or Stand-Alone Partner Events

Ancillary and stand-alone partner events are powerful ways to deepen your customer and prospect relationships while showcasing your Salesforce expertise. Ancillary events are functions held before or after larger conferences or Salesforce events. For Salesforce events, partners must be event sponsors to host an ancillary event. Stand-alone partner events, such as roundtables, executive dinners, or product presentations, are separate from larger events. This timeline will guide you through the event hosting process and help you create effective, engaging experiences.

About 9 Weeks Before

Confirm Venue and Dates

Book a venue near the Salesforce event or arrange transportation.

PRO TIP
Use an event planning template like this one that keeps everything in one place and all key stakeholders aligned.

Lock in Host and Speakers

- Identify executive hosts and agree on the hosting process to prep them for prospect and customer meetings.
- If necessary, make sure onsite hosts and speakers have confirmed travel arrangements.
- In the event of a speaker emergency, have a backup plan.
- If you're interested in having a Salesforce speaker, discuss with your Salesforce Partner Account Manager at least three months in advance and review Working with Salesforce Speakers.

About 8 Weeks Before

Finalize Your Invitation List

Work with your sales team and sales executives to identify target accounts and attendees.

Create Your Registration Page

Review Salesforce branding guidelines.

Create Customized Invite Templates

Have your sales team send personalized email invitations for maximum effectiveness.

About 6 Weeks Before

Send the First Round of Invitations

- Use your marketing automation tool, but personalized emails from your sales team are most effective.
- Promote your event online, depending on its size and goals.

Determine Creative Needs

- Create customized banners and directional signs to help attendees find the venue.
- Order branded gifts for attendees, especially for ancillary events.

Arrange Catering

Agree on your menu early, and consider attendees' dietary restrictions.

PRO TIP

Ask your venue for its preferred caterer. Often these caterers know the venue well and are experienced in using its facilities.

About 3–4 Weeks Before

Send Follow-Up Emails

Send emails to remind attendees of the event.

About 2 Weeks Before

Create Briefing Document (Executive Events/Roundtables)

- Have your account teams complete briefing documents for your executive hosts.
- Organize a call with executive hosts to review the briefing document.
- Hold a final walk-through call with the venue to confirm final numbers as well as food allergies and intolerances.

About 1 Week Before

Send a Know-Before-You-Go Internal Email

- Determine and communicate roles and responsibilities.
- For executive events, organize a table assignment call with stakeholders and the event team.
- Create follow-up template emails for post-event use.

Send a Follow-Up Attend Email

- Send reminder emails to confirmed attendees and final invitations to not-registered target accounts.
- Confirm that swag and signage have arrived at the venue.

1 Day Before

Send a Final Reminder Email

- Send a “see you tomorrow” email to all confirmed attendees.
- Send a final reminder to the team involved.

PRO TIP

Text your team members! This provides them an onsite contact number on their phone in case they get lost or need assistance.

Event Day!

Go Over Onsite Reminders

- Go over the plan and roles with the onsite team.
- Organize name badges by table and alphabetically.
- Mark executives as they arrive.
- Check on hosts or executives two to three times during the event without interrupting conversations.
- If hosting at a Salesforce office, work with your Salesforce Partner Account Manager to organize badges and attendee escorting.

Bring Items Onsite

- Have a computer or laptop for check-in and table assignments.
- Bring a label maker for last-minute name badges.
- Place welcome signage.
- Consider including iPhone and Android chargers, mints, or other items executives may request.

1 Day After

Send Follow-Up Emails

- Send an internal email with the event summary, final attendees, and suggested next steps.
- Send thank-you emails with suggested next steps. Include relevant event materials, as well as post-event surveys, if applicable.
- Have your sales team send personalized follow-ups for better engagement.

Following Up

Effective follow-up solidifies connections, nurtures leads, and makes the most of your marketing investment. By following these best practices, you can turn attendees into loyal customers and advocates.

Before and During

- **Salesforce Event Campaign:** Create the event campaign in Salesforce to track success.
- **Ops Team:** Have your ops team on standby, ready to upload scanned leads into Salesforce.
- **Social Media Plan** (only if it was part of your initial strategy):
  - Ask your whole company to share your early social posts promoting your attendance.
  - Create a social media plan for your onsite shares. Should people post from personal accounts and tag the company, or do you want to provide photos directly to the social media contacts to share from the corporate site?
  - Make sure you have a team on deck for these posts and space in your social media calendar for day-of activities.
- **Home Tiger Team:**
  - Have your sales team on standby for immediate follow-up with hot leads. You can send pictures of badges, notes, and more to your sales reps on key prospects or customers.
  - Start a Slack channel to ask for backup, share details (including photos), and share all onsite information to the home team.
- **Ancillary Event Attendees:** Create general follow-up email templates for attendees and no-shows.
- **Booth Scans:**
  - Create general follow-up email templates for different audiences, including those scanned at the booth and those you had meetings with.
  - Create entire nurture campaign that drips over one to two months.

After

- **General Strategy:**
  - Have a solid follow-up plan to make the most of brand awareness and leads captured at the event.
  - Follow up shortly after the event but not so soon after that people are still traveling and catching up. Aim for the next week.

- **Pre-Event Strategy:** Review your pre-event follow-up strategy. Does the general email still work, or do you want to adjust based on something that happened at the event?

- **Lead Management:** Upload leads to your systems, and apply appropriate follow-up strategies based on their interactions with you. Some may need to go into an event follow-up nurture track, while others may benefit from a personalized connection from a sales development rep or other appropriate sales team member.

- **Sessions and Booths:**
  - If anyone attended customer or prospect sessions, send the speaker a personal note on what you learned and loved about their session.
  - Write a blog post with the event highlights, including callouts for customer or prospect speakers.
  - Create an event wrap-up email to share with internal stakeholders. Include:
    - Number of booth visitors versus goal
    - Hot leads you met with or marquee accounts who stopped by
    - Marketing follow-up plan
    - Templates for your sales team to send personalized follow-ups
  - Send thank-you emails to booth or session visitors.
  - Send "sorry we missed you – we'd still love to show you what's new" emails to expected booth visitors who didn't stop by, and ask them for a new time.

- **Partner or Ancillary Events:**
  - Create an event wrap-up email to share with internal stakeholders. Include:
    - Number of attendees versus goal, specifying prospects versus existing customers
    - Total pipeline influenced, goal versus actual
    - Feedback received, including any quotes
    - Pictures
    - Marketing follow-up plan and email templates that will be used
    - Templates for your sales team to send personalized follow-ups, including relevant or new content
  - Send thank-you emails to attendees.
  - Send "sorry we missed you – we'd love to see you next time" emails to any no-shows, and offer them a personalized meeting or alternative information (for example, e-book, webinar, demo video).

- **Success Measurements:**
  - Compare the initial plan with what really happened. What were your goals, and what measures did you establish to articulate what success looks like?
  - Schedule a post-event metrics debrief.
  - Summarize lessons learned and the most effective activities to inform your strategy for future events.

Additional Resources

Guides and Additional Assets

Maximizing Marketing Return with Events

Make the Most of Dreamforce for ISV Partners