



Make the Most of Dreamforce for ISV Partners

Dreamforce is a vibrant hub for connecting with key prospects, customers, and partners. To make the most of this incredible opportunity, it takes more than just financial investment to sponsor; it demands a strategic commitment. By investing the time and resources before, during, and after the event, you can capture the attention and generate the leads that will drive your business forward.



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Setting Goals for Maximum Impact

Clear, documented, and communicated marketing goals around Dreamforce are essential for proving return on investment and avoiding disappointment. Since success can mean different things to different departments, it's crucial to capture what success looks like across your entire organization, not just your marketing team. Here are some key areas to focus on as you set your goals for Dreamforce.

Brand Awareness

Dreamforce is Salesforce's biggest event of the year, and sponsoring it provides a prime opportunity to co-market and align with the leading names in technology. Show your customers, prospects, partners, and Salesforce itself that you're deeply invested in your shared use cases.

Possible KPIs:

- Increased web traffic
- Social media metrics
- Earned media coverage
- After-hours sponsorship attendees

Relationship Building

Dreamforce brings key decision makers together in one place, making it easier to have multiple face-to-face conversations with important prospects, customers, or partners. Identify who you want to build relationships with and plan time with them in advance. Host them for meals or ancillary activities that will allow you time to connect. Most people have their agendas very full, so connect early to confirm a date, time, and location.

Possible KPIs:

- New opportunities
- Open opportunities accelerated at Dreamforce
- Net-new logos

Lead Generation

Your investment in a booth at Dreamforce should yield high-quality prospects that align with your target market and ideal customer profile. By engaging in meaningful conversations, you can significantly boost your sales pipeline, with the potential to close deals. This is a key outcome for sponsoring and a crucial opportunity to drive growth and expand your customer base.

Possible KPIs:

- Booth scans
- New or reengaged opportunities
- Lead conversion rate
- Time for leads to close

New Partnership Opportunities

Connect with the extended Salesforce ecosystem at Dreamforce. From innovative startups to established industry leaders, this network can offer you potential collaborations to help you expand your reach, enhance your offerings, and drive mutual growth. Engage with these companies at Dreamforce to explore co-marketing opportunities, joint ventures, and other initiatives that can benefit both parties.

Possible KPIs:

- Number of new partner leads post-Dreamforce
- Number of new partnerships created
- Partnership pipeline value
- Partner enablement opportunities post-Dreamforce
- Co-marketing opportunities post-Dreamforce

PRO TIP:

Use the [Salesforce Events app](#) to connect with attendees and review all the sessions. The Dreamforce portion will go live about a month before the event, so take advantage of this powerful tool.

Deal Acceleration

If you have contacts in your sales pipeline who are attending Dreamforce, take advantage of this prime opportunity to get your team in front of the buying committee, demonstrate your value, and speed up the time to close. Since Dreamforce takes place in the fall, it's a unique chance to push for end-of-year deals.

Possible KPIs:

- Open opportunities accelerated at Dreamforce
- Win-back opportunities
- Reinvigorated stalled deals

Thought Leader Status

Purchase a speaking session at Dreamforce. Presenting on stage, highlighting a customer, and sharing your unique value proposition can be very compelling and leave attendees with a lasting impression. Additionally, once you're established as a thought leader, attendees may want to visit your booth or connect to explore opportunities together.

Possible KPIs:

- Theater session scans
- New Salesforce organization introductions (new use cases, new teams)
- Booth scans
- Social media engagement
- Content engagement metrics
- New subscribers
- Search engine optimization (SEO) metrics

Goal Alignment Across Departments

Since a wide range of people from your organization will attend Dreamforce, their goals may differ. Each department may have a different set of priorities and views on what success looks like.

PRO TIP:

Create a pre-Dreamforce survey for each department head or host an early prep meeting to capture what is most important to alliances, executives, marketing, and sales. This will ensure everyone is on the same page and working toward a common goal.

Investing in Your Sponsorship Booth

Many partners have a significant investment in an onsite booth, either in the Campground or at another Dreamforce campus location. Your booth will draw attendees in, tell your value proposition to prospects and customers, and be where most of your conversations take place.

Before

Many ISVs use Dreamforce to launch new branding, solutions, mascots, or messaging. We've provided a timeline of due dates for your booth graphics (see [Counting Down to Dreamforce](#)), but your planning can start now.

Use the Exhibitor Resource Center (ERC):

The ERC is the main sponsorship management site where you'll find resources, deadlines, and deliverables. Once you're signed up and confirmed as a sponsor, our sponsorship team will reach out and give you access to the ERC. Check this portal on a regular basis.

Solidify Your Key Message:

- Are you launching a new product or a key new feature?
- Do you have a new Agentforce agent you want to promote?
- Is there a competitor you want to differentiate from?
- Did you recently go through an acquisition or update your branding?

Identify Your Theme:

Many companies show up with a theme at Dreamforce to stand out. Everything from their booth to their team's outfits align to this theme.

Create Attention-Grabbing Visuals:

Mock up how you want your booth to look based on its size and your theme. Make sure your design stands out in a sea of apps and booths while your message remains clear.

Build an Onsite Super Team:

- Bring friendly people who can speak to your value proposition.
- Know which executives will attend and their willingness to "work" the booth.

Before (Continued)

Choose Your Booth Location:

- The floorplan will be shared when it's time for booth selection, which starts a few months before Dreamforce. Once booth selection begins, our sponsorship team will reach out directly to you. Booth selection order is based on the contract time stamp. The first to sign up is the first one to select.
- You'll have about three days to review the floorplan and rank your top three to five choices based on availability.
 - Choose your booth location based on the available information and your use cases. For example, if you sell to Service Cloud customers, pick a location near the Service Cloud exhibit in the expo hall. The map you'll receive as part of this process may change but will show you where the Salesforce booths are tentatively located. If you have an industry focus, think about choosing a spot near the industry vertical portion of the expo hall.
 - Have more than one booth preference in case your ideal spot is already taken.
- The sponsorship team will confirm your choice, based on your booth queue position.

Design Your Booth for Maximum Engagement:

When designing your booth, consider:

- **Standing Areas:** Ensure there are clear, comfortable spots for visitors to gather and engage.
- **Screen Placement:** Position your display screens where they're easily visible to passersby.
- **Readable Space:** Make sure there's enough readable content that can be seen from a distance, capturing the attention of people walking by.

PRO TIP:

Confirm your sponsorship as soon as possible to secure your spot for booth selection. This ensures you have the best opportunity to choose a prime location that maximizes your visibility and engagement at Dreamforce.



Before (Continued)

Identify Your Meeting Space: Your booth can become a bustling hub of activity – excellent for lead generation and brand awareness but not ideal for strategic, one-on-one sales meetings. Many sponsors rent meeting rooms onsite as part of their sponsorship package or host offsite meetings at their office or an additional venue outside of Moscone.

If your sales and executive teams need dedicated meeting space, factor this into your budget, planning schedule, and staffing. Whether hosting meetings in an expo floor room or offsite, extend your branding and planning to these spaces to maintain a consistent and professional presence.

- Consider distance. A mile away from Moscone might not sound far; however, in the hustle and bustle of San Francisco and Dreamforce, it could deter someone from visiting your meeting space.
- Outside venues book quickly, so decide as soon as possible if you want additional space so you can snag your spot fast.
- Brand your meeting space to mirror your booth message.
- Create meeting space goals, for example, the number of meetings, types of meetings, opportunities opened, and deals closed.
- Have specific content or collateral available, including videos to run if digital displays are available.
- Bring all demo equipment, including HDMI cords, chargers, power cords, and monitors. Notebooks and pens are a nice touch.
- Include room-specific swag or different executive-level swag.
- Identify specific calls to action, and assign who'll follow up after these meetings take place.
- Include snacks, drinks, extra chargers, and more for those you're meeting with.
- Create a specific meeting schedule and stick to it so you avoid meeting space overlap.
- Assign a meeting room "owner" who can unlock it in the morning, keep it clean, and lock it up at night.

PRO TIP:

Dreamforce is a busy week, so ask your sales team to include expected attendees' cellphone numbers in the scheduler so you can reach out if they're late. Also send a meeting invite and reminder the Monday before Dreamforce and the morning of the meeting.

Before (Continued)

Choose Your Staff: Staff your booth with polished, professional, and friendly people who are passionate about your company, products, and services.

- **Demo leads:** A solution engineer or product manager is great here. This role needs to be able to show a value-based demo on the fly to any prospect or partner. Because Dreamforce can be demanding, we suggest having two people per demo to allow for breaks or multiple demo conversations at once.
- **Crowd-gatherers or brand ambassadors:** These individuals stand at the front of your booth and pull people in. They're your most friendly and approachable people who have the value proposition nailed down. Marketing team members and sales development reps are usually great in this role. The number of people you want in this role will depend on the size of your booth. Create a schedule, including lunch and other breaks.
- **Non-booth attendees:** Key sales reps for an industry, your sales leader, or your partner marketing or alliance lead can help fill booth spots to give breaks but also should be free to join customer or prospect sessions, attend set meetings, and network.
- **Booth manager:** This person keeps everyone on a schedule and keeps the booth clear of clutter, communicates with reps and executives who have someone stop by the booth, set up and troubleshoot Wi-Fi, charge your scanners at the end of the night, and lock up your cabinet.

If you have both meeting space and a booth, you'll need to get creative with schedules and bring more people to help staff. Also, avoid overcrowding one area. Too many people in a crowded booth may be unwelcoming.

Create a Schedule: Avoid scheduling anyone for the full day and factor in breaks. Ensure your team gets there early, with plenty of time for San Francisco and Dreamforce traffic, check-in, security, and scanner pickup. Sponsors have access to the show floor before the general public, so take advantage of this time to meet as a team, set up final touches, and have a cup of coffee. Booth staff must be at the booth during all open show floor times.

If you have a meeting room on the expo floor or offsite, dedicate a schedule and staffing to that area too.

PRO TIP:

Check and share the Moscone bag policy. Limit the number of large bags brought to your space, because there may not be enough room for every staff member to bring a backpack. Space should be prioritized for those carrying equipment or swag.



Before (Continued)

Prepare Your Team: Host at least one prep meeting with your entire event team before Dreamforce to get everyone up to speed on the goals, messaging, and expectations. Go over:

- Dreamforce prospectus information, including how many people, roles, industries, and personas you can expect
- Preferred hotel and travel arrangements
 - Keep in mind international travelers and possible delays.
 - Identify who arrives when and what needs to be set up or organized onsite. If you have offsite branding, you'll need people on hand to help.
 - Plan for your marketing team to arrive one to two days before. You'll have access to the expo hall early and should take advantage of that time to find packages, finalize your booth, and buy last-minute needs.
 - Make sure team members collect their Dreamforce badges personally with their own ID the day before the event.

PRO TIP:

Local airports are San Francisco International Airport (SFO, near South San Francisco) and Oakland International Airport (OAK, just across the bridge). OAK is smaller, often less hectic, and an easier commute into the city than flying into SFO.



- Scan brand awareness, meetings, and other Dreamforce goals
- Clothing or uniform for the event
 - Black pants and branded shirts are always easy.
 - Team members should bring a mask and have it handy to match your visitors' comfort levels.
- Booth overview, including what the message is, what the booth looks like, where you're located, and what you're giving away and to whom
- Elevator pitch, overall messaging, and relevant talk tracks (for example, a customer success story)
- Plan of attack for different visitors, such as what to do with an upset customer wanting support, a hot prospect looking for immediate help, a customer or prospect looking for someone specific, or a key partner contact visit
- Expectations, including arriving on time, being well rested, keeping the booth clean, and staying until a specified time
- Emergency plan in case of an emergency
- WhatsApp or Slack group for the team to easily communicate things like travel, schedules, issues, or key visitors to the booth

PRO TIP:

Hold a prep session that solely role-plays the different personas you anticipate seeing at the booth.

Before (Continued)

Prepare and Design Your Booth:

- You have 10 seconds to grab visitors' attention, so create a bold, inviting, interactive experience. Avoid white-only backgrounds and clashing colors. Ensure your messaging is clear.

PRO TIP:

Avoid graphics with too many dark undertones, as they may not stand out.

- Understand the space you have to create your message on your booth. Space is limited, so have a design that's easy to read and grasp what you do even as they walk by. If you don't have a strong in-house design team, hire professionals.
- Prioritize demos; nothing sells your solution like seeing it in action. The goal for 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. The demo should be specific to your solution plus Salesforce. If there's time, provide a use case or industry-specific demo to a prospect, but always have a stock demo ready that applies to the widest audience possible.
 - Always have a backup demo plan. Create a video of your demo (doesn't need sound) and upload it to the demo laptop. Wi-Fi onsite can be tricky, so this allows you to show something even if the live demo isn't available.
 - When no live demo is taking place, have the demo video or polished marketing video running so there's never a blank screen. (This is a great place to use [Partner Co-Marketing](#) content, if you have it.)
 - Prepare your whole booth team for the demo flow and talk track. If your demo team has a packed house around its laptop, another booth staff member can talk prospects through what's being demoed.
- Answer "What do we do?" in the Salesforce context clearly and simply. Position your most important messages above people's heads to be easily read and understood as attendees walk past your booth in a crowd.
- Use fewer words, larger print, and visuals that align with your message.
- With your customers' permission, incorporate their success into your materials. Include talk tracks, solution sheets, or case studies available on an iPad at the booth or in your video and follow-up.

PRO TIP:

Work with the demo team to incorporate a customer story into each demo use case.

- 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 contact information.
 - Leave a note in your scanner or a notepad on what a particular customer was interested in. For example, if they wanted to learn more about our FinServ customer use cases, include a customer success story in a follow-up email.
 - Offer swag or a nice takeaway such as attending a demo or having a meeting with a subject matter expert.

Before (Continued)

Promote Your Attendance: If you've invested in a booth at Dreamforce, promote it to your customers, prospects, and partners. This is about more than your financial investment; it showcases your co-marketing investment and deep partnership with Salesforce.

- Send an email (or two) to all customers and prospects announcing your Dreamforce sponsorship and attendance. Ask if they're attending and offer personal demos or meetings.
 - Start your email (and social) promotion about two months before Dreamforce to remind your prospects and customers about your application, integration, or partnership. Even if the contact isn't attending Dreamforce, this opens an opportunity to set up a meeting wherever they are – especially if they're part of the large tech scene in the Bay Area and can meet with your team while it's in town.
 - Determine interest before Dreamforce so you can plan accordingly. Does one sales rep have more customers going than others? Send them as part of your event team.
 - Include where your booth will be (booth number), what you plan to show or demonstrate, and what giveaways or incentives you'll have for visiting the booth.
- Create a social media plan for your onsite team, and have a team back home ready to post, share, and assist in promotion.



During

Show up early and plan on staying late. Factor in extra time for everything. Eat when you can, drink lots of water, and don't break in those fancy new shoes on the show floor. Stay energized and ready to make the most of every moment at Dreamforce.

PRO TIP:

It's a long week, so make sure your team members cover for one another. Everyone should have the chance to eat, stay hydrated, and take a small break.

Set Up Your Booth: Have at least one main person who's in charge of setting up the booth before the doors open. Setup should include:

- Picking up scanner(s)
- Setting up a basket of mints, hand sanitizer, granola bars, bandages, ibuprofen, or other goodies for the team (in a cabinet or tucked away)
- Setting up swag and other takeaways
- Setting up screens, connecting to Wi-Fi, and testing video and 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 notes for next steps that are detailed and clear enough for a colleague to follow up appropriately from this connection. Use a notebook to write down key conversations if you don't have note abilities in your scanner.

PRO TIP:

Define and share with your booth team your definitions of hot, warm, and cold leads to speed up the follow-up.

Offer Call-to-Action Options: If a prospect is interested but doesn't want a demo in the booth, have a second call to action. Can you schedule time with them on the spot with an iPad? Can you have them scan a QR code so they can access collateral and content after the show? If all else fails, take a picture of their badge and send it to the rep who owns that account.

Look Around:

- Take time to walk the floor and see how competitors and others are positioning themselves.
- 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. Bonus points if someone can take pictures and notes, then tag the speaker, the company, and Salesforce on their social media. Share the notes, quotes, and highlights with the sales team member who owns the account so they can do a personal follow-up. Stay after to introduce yourself and tell the speaker what you loved about the session. Also introduce yourself to the Salesforce account executive, partner, or other individuals with the speaker.

After

Set Yourself Up for Success:

- Create a general follow-up email template for your different audiences, including those scanned at the booth and those you had meetings with. Better yet, create an entire nurture campaign that drips over one to two months.
- Create a Dreamforce campaign in Salesforce so you can track success.
- Have your ops team on standby, ready to upload scanned leads into Salesforce.
- Identify who'll follow up with partners (probably alliance team), customers (sales team), prospects (sales development rep or business development rep team), and Salesforce employees (alliances) met with.

Create a Home Tiger Team:

- Engage your sales and customer success/ account management teams early to help promote your attendance.
- Engage your marketing and social team.
- Ask your 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 send photos to the social media contact to share from the corporate site? Have a team on deck for these posts and space in your social media calendar for day-of activities.
- Have your account executives on standby for immediate follow-up with hot leads. Send pictures of badges, notes, and more to your sales reps on key prospects and customers of theirs who stop by. Start a Slack channel to ask for backup, share details (including photos), and have one place to share onsite information.

After (Continued)

Follow Up:

- Start shortly after Dreamforce but not so soon after that people are still traveling and catching up. Aim for a week after.
- Review your pre-event work. Does the general email still work, or do you want to adjust based on something that happened at the event?
- Upload leads and start assigning them to the right people (sales development rep, account executive, or partner).
- Send your general email or start of the nurture campaign from your marketing automation solution.
- Share the templates you created before you left for Dreamforce with the sales, alliance, and business development rep teams. Provide guidelines on follow-up expectations.
- If you attended a customer or prospect session, send that speaker a personal note on what you learned or loved about the session.
- Create an event wrap-up email to share with all internal teams involved in helping Dreamforce be a success. Include:
 - Number of booth visitors versus goal
 - Hot leads or marquee accounts you met with
 - Total pipeline reached
 - Templates for account executives to customize for a more personal touch
- Send an email to meeting no-shows asking for a new time.
- 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, an e-book, webinar, or demo video).
- Write a blog post with the event highlights, including callouts for customer and prospect speakers.



Speaking at Dreamforce

Speaking at Dreamforce gives your organization a lot of brand awareness. Here are a couple of ways to gain a speaking spot:

Sponsorship: Some sponsorship levels include a theater or breakout speaking spot.

Call for Speakers: Anyone can apply through Salesforce's open call for speakers; however, customer success stories and topics aligned with Salesforce's current messaging have a higher chance of being selected. Be specific and detailed in your submission to stand out.

PRO TIP:

Use Salesforce+ to reach the virtual audience.

PRO TIP:

If you purchase a speaking session, ensure a staff member is available to scan attendees. This is the only way to receive the attendees' contact information.

Before

Choose Your Speaker Wisely: Your session speakers should be experts in their field, feel comfortable presenting to a large audience, have compelling stories to share, and be passionate about the topic. High energy and engagement are crucial, as your audience will be listening to presentations all day. If possible, bring a customer to join your session. Real-world stories and firsthand experiences resonate deeply with attendees and provide the most effective insights.

Talk About What You Know: Choose a topic where your speaker and your company are experts. How can your session benefit this audience? How does your solution enhance a Salesforce solution?

Make It Professional: If you're sharing slides, take the time to make them professional. Enlist your marketing team or an agency to create something beautiful and easy to read. Use more images and fewer words.

Practice: Time yourself and practice more than you think you need to, including audiovisual testing. Practice in front of others, ask for feedback, and test out the stories and reactions. And leave enough time for Q&A. Build in time after your session to meet with engaged individuals.

Before (Continued)

Create Engagement: Keep it interactive. Pause for moments of audience engagement. Tell stories and make them relatable. Include fun and memorable demos, where appropriate.

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.

During

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

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

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.

Make It Actionable: Make sure your session title is accurate and relevant to the topic; provide clear takeaways for the audience; and include a call to action at the end, such as visiting your booth or accessing more information through a QR code on a slide.

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.

PRO TIP:

Write a blog on the topic or host a post-Dreamforce webinar for those who didn't attend but would find the content interesting.

Connecting with Prospects and Customers

Alliance Teams (and Marketing's Role in Assisting)

Before

Nail Down Your Prospect List: Agree on a go-to-market plan for Dreamforce with your key stakeholders, mapping each account with a sales team member, inviting those individuals to activities you're running, promoting these efforts to broader relevant sales teams, and not forgetting to track opportunity influence along the way.

Don't Forget About Salesforce

System Integrator Partners: If you're an alliance lead, you'll want to meet with customers, prospects, Salesforce employees, and partners. Know which Salesforce system integrator partners are attending and where they're speaking, and set up time with your top partners and any new ones you'd like to partner with.

Brief Your Executives: If you're inviting executives to meetings, pair the invite with a briefing doc. Make sure they know who they're meeting with, as well as the meeting's key initiatives and goals. Include titles, relevant history, and goals you'd like to accomplish at the meeting.

Have Experts on Hand: Include someone with a technical background for high-potential meetings. Reach out early if you'd like a technical evangelist to join meetings in person or virtually.

Book Meeting Space Early: Meeting room space is limited. 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, that's also a good option to take advantage of. You may be able to rent meeting space through the Salesforce sponsorship team. Refer to the most current Dreamforce Sponsorship Prospectus.

Get Your Marketing Materials Ready: Sales, alliances, and marketing should work together to grow interest before each part of your Dreamforce engagement. This could include sales scripts and follow-up materials as well as the takeaway collateral onsite. Update relevant one-pagers and landing pages, and provide QR codes for both. If you've invested in **Partner Co-Marketing** material during the year, bring those assets along.

Before (Continued)

Maximize In-Person Time: Use qualifying questions when setting meetings. Keep meetings to 30 minutes, with a 15-minute buffer. Moscone and the surrounding Dreamforce events area are huge, so you and your prospects may need time to make it to another meeting.

During

Invite Salesforce to Help: Make sure your sales and alliance teams are hard at work inviting the right people to your booth and meetings. From a marketing perspective, offer to help draft social tiles, landing pages, emails, and slides. You can also ask your alliances team to share invitations with Salesforce account executives and Salesforce solution engineers to help host prospects and customers.

After

Follow Up: Make sure your follow-up messaging clearly ties to the experience attendees had with you. Plan a personalized message that includes any promised follow-up items like demo videos, content, or introductions.

Decompress Together: Get your team together on the last day to review leads in a casual environment. And remember to celebrate your success.

Study Up: See what key customers and technology partners are doing at Dreamforce. Know if they're speaking or hosting events. Set aside time to attend the sessions and engage with speakers after. Watch their social media and promotions around Dreamforce to get an idea of their topic or theme.

Share That VIP Feeling: Invite customers and prospects to attend a keynote, inspirational speaking session, or live music event to build relationships around cornerstone, planned event activities. Finding time is hard and areas around the event are often crowded, so don't count on being able to sit down to coffee, make a plan, and designate a space to connect.

Track Your Success: Take time for a team review of Dreamforce. Take notes on what worked, where you can improve, and what actions you can take to prepare for the next event. Ensure all leads are in a campaign you can track and that you measure your goals versus the reality of the event.



Marketing

Before

Define Goals and Set Metrics: Capture what would make the investment in Dreamforce a success. Include goals and initiatives from across your organization, not just marketing. Start a spreadsheet and capture those specific goals to make it easier to show progress leading up to Dreamforce (meetings booked) and final results (meetings completed and opportunities opened). Documenting before and after will make it easier to not only show what worked but also make the case for more investment next year. For more information on goals, refer to [Setting Goals for Maximum Impact](#).

Make a Plan: Promoting your investment drives awareness and action. Brainstorm with your team the ways you can talk about Dreamforce before (build attendance), during (drive activities), and after (continue the momentum). A few ideas:

- **Before:** Social posts and a blog on what you plan to highlight, announce, or show
- **During:** Social posts with customers, sessions, and after-hour events
- **After:** A blog, email, and social post on what you learned at Dreamforce and the highlights you can pass on to customers and prospects

Define the Customer Journey: Pre-work on campaigns, customer journey, and follow-up plans makes the follow-up work more streamlined. Create Salesforce campaigns and lead routing rules ahead of time. Consider a main Salesforce campaign and subcampaigns for meetings and after-hour events versus booth scans. Identify where you'll assign lead types (customers, prospects, Salesforce implementation partners, Salesforce). Assign scanned leads into a nurture journey that aligns with the respective event experience. Make webinars, account-based marketing, and deal acceleration events part of your post-event strategy.

Craft Your Message: Create a clear theme, design, and message for each stage and audience. Messaging should be differentiated, align to your value to a Salesforce customer, and clearly state what you do and for whom.

Book the Fun Stuff: While your alliances and sales teams are setting meetings and securing space to have those conversations, book and make reservations for happy hours, keynote viewing, and other meals or ancillary events you'd like to host for customers during the event. San Francisco books up quickly around Dreamforce, so plan early.

Before (Continued)

Spruce Up Your Listing: Your AppExchange or AgentExchange traffic will increase before and after Dreamforce as teams research who they want to meet or met with. Before Dreamforce is the time to update your messaging and resources.

- Are your latest features and functions highlighted in your listing?
- Are you differentiated or are there new competitors or competitive Salesforce features you should message differently around?
- How are you talking about AI and/or Agentforce?
- Do your slides show your updated branding?
- Are your latest and greatest customer stories highlighted?

Invest If You Have Gaps: If your team isn't strong on booth design, hire outside help. Need help with a communication plan or content? Hire professionals.

Stay Up to Date: Announcements will come quickly leading up to Dreamforce. Make sure you're following Salesforce on LinkedIn and you're subscribed to all Salesforce emails. Start tracking what your key partners, prospects, and customers are saying around their Dreamforce plans. Be aware of what your competitors are saying, and adjust messaging if necessary. Make sure you're in compliance with [Salesforce partner brand guidelines](#).

Review Public Relations Tips: As you think about return on the Dreamforce investment, the more press, the better. But comply with all Salesforce rules. If you're planning any PR activities, review the [Partner PR guidelines](#). Always lead with customer stories or product announcements, which capture more attention than a general "we'll be there, too" story.

Keep People Engaged: Run paid media or paid search campaigns before, during, and after to stay engaged with visitors to your website or individuals who search for your company. Also nurture leads from content syndication for events.

Bring Dreamforce to Your Audience: Whether you have a large target market far from the city or want to include more people, virtual watch parties are fantastic ways to engage your audience and share the excitement of Dreamforce. Watch party guides will be published a few weeks before the event.



During

Staff Up Your Social Media Team: For customers who aren't attending, have a staffing plan for engaging on social media. Your team can help drive booth traffic or schedule virtual meetings for interested prospects not onsite. They can also help monitor what your customers, prospects, and partners are saying and doing during Dreamforce. Host virtual promotions for in-person experiences.

Brand Every Event: Hosting a kickback, happy hour, or executive dinner? Use any screens in the space to play **Partner Co-Marketing** content or other videos you've created for the event on a large screen to create a customized feel. Create signs and clear directions for getting to your event. Have postcards at your booth that can also invite people to your event or show them a map of offsite meeting spaces.

After

Share Recaps: Shout from the rooftops Dreamforce accomplishments and expected next steps. Summarize your Dreamforce news in social recaps or a blog post to send to your email lists. Always include fun pictures or sizzle reels.

Create a recap email for your internal team and executives. Include key conversations, new opportunities, and important next steps.

Schedule a Debrief: Put a post-event metrics debrief on the calendar before you leave for Dreamforce. Pull people together quickly to capture what worked, what didn't work, suggestions for next year, everyone's personal highlight of the week, and individual follow-up plans.

Make Daily Updates: Keep a running tab of notes each day. Highlight prospects that are further qualified, deals that are signed, and progress that is made toward other key business metrics. Call out key partners who stopped by, memorable conversations, and any customer concerns that need immediate attention.

Don't forget to take lots of pictures to add to executive review decks and recap communications to bring the excitement and energy of Dreamforce to life. By the end of the week, conversations can start to blend together, so create a dashboard to track your results and highlights. Stay engaged, and make the most of every interaction.

Measure Success: Revisit the initial goals section: What were your goals and what measures did you establish to clearly articulate what success looks like? Compare your initial plan with what really happened.

For example:

- Goal: Fifty new scanned contacts a day. Did you overachieve or miss by a bit? Which factors contributed to success and which hindered it?
- Goal: Each executive has five meetings a day with prospects. Did you over- or underachieve?
- Goal: \$3 million in new pipeline generated from the event. Did you hit your number? What contributed to success?

Collect Learnings: Summarize lessons learned and the most effective activities to inform your strategy for future events like World Tours as well as Dreamforce. Capture these before the feedback from Dreamforce becomes the success of deals.

Counting Down to Dreamforce

90+ Days Before

- Book meeting space. Do you want it on the expo floor or outside of Moscone? Book early.
- Determine if you have larger, offsite activities like happy hours or sporting events.
- Identify co-sponsors and goals.
- Place reservations or holds for prospect or customer dinners.
- Identify theme and design details for your Dreamforce booth.
- Order swag and team uniforms and identify their arrival time.
- Create an initial staffing plan.
- Capture goals and success metrics by department.
- Identify speaking opportunities, speakers, and topics. Reach out to customers to see if they'll be involved.
- Understand any new product enhancements, features, or agents you should mention in upcoming marketing material.
- Provide guidance to your team attending Dreamforce on the preferred hotel, travel dates, and your travel and expense policy.

60 Days Before

- Draft messaging guidelines. What are your key messages for Dreamforce?
- Finalize your elevator pitch.
- Finalize booth messaging and design.
- Create booth staff readiness training decks.
- Confirm the demo flow and messaging, and include it in the readiness deck.
- Solidify your marketing plan to promote Dreamforce and how that plan aligns with the departmental goals.
- Finalize offsite plans.
- Review your one-pagers, website, AppExchange or AgentExchange, and other collateral and content for needed updates.
- Start your marketing promotion on social media and in email to secure meetings.

60 Days Before

(Continued)

- Have a registration plan in place. Will marketing register for everyone or everyone register on their own? What's the preferred hotel?
- Set up prep meetings for 15 to 30 days before.
- Create a landing page or other means for prospects, customers, and partners to set up or request meetings.

30 Days Before

- Finalize on-floor and follow-up content, including AppExchange or AgentExchange updates, one-pagers, decks, and case studies.
- Identify what you'll print and have available onsite for booth and meeting spaces.
- Create booth and meeting space schedules.
- Identify booth and meeting room captains.
- Comb the agenda builder for customers and prospects who are speaking, create a schedule, and inform your team of time and location.
- Draft an emergency plan.
- Create a Slack channel or WhatsApp text group for those on the ground.
- Reach out to Salesforce contacts to identify who from your network will be there.
- Have your sales and alliance teams reach out to customers, prospects, and partners to set up meetings.
- Start social media promotions. Include reasons people should set up time and your meeting link. Promote your booth, your meeting space, and any outside events, as well as your speaking session. These can all be different communications.
- Send one to three official "we'll be at Dreamforce" emails from your corporate account. Include everywhere someone can find you and include a call to action to set up time or register.
- Record the final demo track as a backup.
- Finalize a deck or video to play in the background in your booth (when not demoing) and in meeting spaces.
- Create a shopping list for snacks, bandages, hand sanitizer, gum, HDMI cords, power strips, and other items needed onsite.

30 Days Before

(Continued)

- Set up a pre-Dreamforce onsite meeting (dinner, hotel meetup) for when everyone is in San Francisco. This is your time to give final instructions, answer questions, and get the team pumped up.
- Ensure all shipments are sent to either Moscone or your hotel. Stay close to the sponsor deadlines Salesforce provided.
- Monitor social media and email for events outside of Moscone where your customers and prospects will be. Are they hosting a happy hour? Do they have a meeting space? Share that information with your sales and alliance teams so they can plan to register and attend.
- Download the Dreamforce events app.
- Identify print shops nearby in case you need to print any last-minute banners or signs.

2 Weeks Before

- Have prep calls with your team.
- Ensure shipments have arrived.

1-2 Days Before

(Onsite in San Francisco)

- Encourage all team members to get their badges the day before Dreamforce starts.
- Access the expo floor, find your booth, review your branding, count your boxes, get your scanners, and check for any extras you paid for like padding or extra chairs.
- Meet as an onsite team one last time.
- Finalize print needs and purchase last-minute items.
- Set up your meeting space.

Rules to Remember and Share with Your Team

- Don't share badges. Some badges may be included with different levels of sponsorship.
- If you receive a discount code as part of your sponsorship, share it with your customers.
- Staff your booth at all times while the expo hall is open. Your entire team doesn't need to be there, but someone must always be at the booth.
- Only scan badges at your booth. Sponsors can't wander the floor or take scanners to theater sessions.

Additional Resources

Salesforce Blog: How To Plan an Event That Drives Business Value

Partner Learning Camp: Build Your Sales Kit

Trailhead: Demo Storytelling

Trailhead: How to Create a Product Demo

Branding Guidelines for Salesforce Partners

Partner PR guidelines

Stay up to date with our upcoming [Salesforce events](#), and check out the [sponsorship website](#) to learn about available opportunities across global events.

