EVENT OR CONFERENCE WORKFLOW [A green sign with white text

Description automatically generated](https://www.smartsheet.com/try-it?trp=11825&utm_source=integrated-content&utm_campaign=/content/conference-planning-templates&utm_medium=Conference+Workflow+doc+11825&lpa=Conference+Workflow+doc+11825)

EVENT NAME EVENT DATE

PROJECT MANAGER EVENT LOCATION



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| **CATEGORY AND TASKS** | **PERSON RESPONSIBLE** | **DEADLINE** | **APPROVAL** |
| Identify event or conference |  |  |  |
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| Create pre-event web page and plan blog content |  |  |  |
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| Create email campaign |  |  |  |
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| Create social media campaign |  |  |  |
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| **CATEGORY AND TASKS** | **PERSON RESPONSIBLE** | **DEADLINE** | **APPROVAL** |
| Create paid promotion campaign |  |  |  |
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| Conduct partner, influencer outreach |  |  |  |
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| Write press release and blog announcing the event or participation in the conference |  |  |  |
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| Book hotels, flights and conference registration |  |  |  |
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| **CATEGORY AND TASKS** | **PERSON RESPONSIBLE** | **DEADLINE** | **APPROVAL** |
| Create booth design and event collateral |  |  |  |
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| Order booth materials & swag |  |  |  |
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| Identify talking points for the booth |  |  |  |
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| Identify how you’ll capture leads |  |  |  |
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| **CATEGORY AND TASKS** | **PERSON RESPONSIBLE** | **DEADLINE** | **APPROVAL** |
| Write and design presentation |  |  |  |
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| Write post-event blog, press release |  |  |  |
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| Follow-up with leads |  |  |  |
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| Report on conference metrics |  |  |  |
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