

# EVENT < > CRM INTEGRATION CHECKLIST

Use this checklist to guide your event strategy from the early planning stages to post-show follow-up. These simple steps will help you capture attendee data, align your teams, and turn every conversation into pipeline-building opportunities long after the event ends.

<p><b>BEFORE THE EVENT</b> <i>Lay the groundwork for success before guests arrive.</i></p>	<p><b>DURING THE EVENT</b> <i>Capture insights in real time so nothing slips through the cracks.</i></p>
<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Integrate your CRM with registration and engagement tools</b> Sync data capture from the start so no lead slips through</li> <li><input type="checkbox"/> <b>Define lead handoff rules between marketing and sales</b> Agree on who gets what, when, so follow-up is seamless</li> <li><input type="checkbox"/> <b>Review and segment pre-event attendee data</b> Know who's coming and tailor conversations to their interests</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Capture onsite interactions directly into CRM</b> Log conversations, demos, and engagement points on the spot</li> <li><input type="checkbox"/> <b>Tag hot leads for immediate follow-up</b> Flag your warmest opportunities while they're still fresh</li> <li><input type="checkbox"/> <b>Document attendee interests, notes, and key conversations</b> Record key takeaways to personalize future outreach</li> </ul>
<p><b>IMMEDIATELY AFTER THE EVENT</b> <i>Follow up fast, fuel your pipeline, and measure what matters most.</i></p>	<p><b>90 DAYS POST-EVENT</b> <i>Evaluate the lasting impact of your event.</i></p>
<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Send personalized follow-up within 24–48 hours</b> Strike while the event energy is still high</li> <li><input type="checkbox"/> <b>Upload and/or sync all new contacts and insights into CRM</b> Centralize all event data so it drives action</li> <li><input type="checkbox"/> <b>Analyze engagement data for new opportunities</b> Look for patterns and next steps to keep momentum going</li> <li><input type="checkbox"/> <b>Share post-event content (photos, videos, insights)</b> Extend the experience with recap content that adds value</li> <li><input type="checkbox"/> <b>Collect and review attendee feedback</b> Listen, learn, and refine based on attendee insights</li> <li><input type="checkbox"/> <b>Apply lessons learned to strengthen your next event</b> Turn feedback into action for even bigger impact next time</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Review attribution and pipeline influence reporting</b> Track sourced and influenced deals back to event engagement</li> <li><input type="checkbox"/> <b>Assess campaign and sales team alignment</b> Check in on how post-event insights supported marketing + sales touchpoints</li> <li><input type="checkbox"/> <b>Reconnect with top leads and re-engage quiet ones</b> Personalize the next touch to match where they are in the funnel</li> <li><input type="checkbox"/> <b>Repurpose event content for year round marketing</b> Turn breakout sessions, panels, or keynotes into evergreen assets</li> </ul>