Your 2027 Event Playbook: Turn Events Into Measurable ROI

A step-by-step playbook for planning, promoting, capturing, and measuring every event on your 2027 calendar.

THE OPPORTUNITY

Proving the Value of a Channel You Already Invest In

We all know events work. In Cvent's 2025 research, 79% of marketers said events matter more than any other channel, yet nearly two-thirds can't attribute ROI to them. But every event has moments where value slips through: the weeks before, the rush on the floor, the days after. When budget season comes, events can show up with a great story and nothing to prove it. This guide will help you plan, set up, capture, and follow up so every event on your 2027 calendar comes back with a number you can defend.

How to use this playbook

This is the same process HiHello's marketing and sales teams run before, during, and after every show. Use it with the two companion pieces: the 2027 Event Calendar & Promotion Planner (a sheet you copy and fill in) and the one-page event checklist at the end of this playbook.



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KEY TERMS

Key Terms to Help You as You Go

Every team uses event words differently, so here's what they mean in the HiHello platform:

Event card

A digital business card built for one event: booth number, promo video, booking link, and floor map. Assign it to the event, and your attending team's cards use it automatically while the event runs.

Company Event

An event you schedule in HiHello ahead of time. It turns on by itself when the event starts and tags every contact your attending team makes.

Individual event

An event one person creates for themselves, with the same automatic tagging.

Event tag

The label on every contact captured during the event window, booth hours or not. It travels with the contact into your CRM.

Lead Capture Form

The two or three qualifying questions your team asks every contact, plus consent fields when the event or industry needs them. Assign one to an event and it applies to that event's cards only while the event is running.

Event recap

HiHello's summary of one event: companies met, contacts captured, and card engagement.

Let's get started 🎉

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STEP 1

Plan Your Year

We map the whole year before Q1, and every show has to answer one question first: will our buyers actually be in the room?

We used to pick events out of habit. Now a show earns its spot on the calendar, and its promotion plan exists months before the booth does.

Pro tip: leave the Prove It columns blank

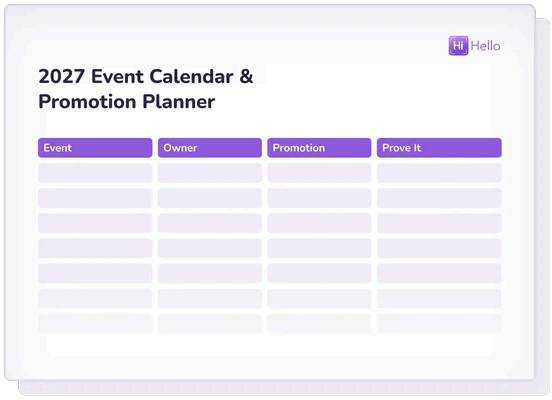
Leave the Prove It columns on the calendar blank for now. You'll fill them in after each event (Step 5), and by Q4 they become next year's shortlist.

- Build your shortlist. Use HiHello's free Event Finder to find events where your ideal buyers will be.
- Pressure-test every show. For each one, write down who's going, why your buyers will be there, and what it costs in total (booth, sponsorship, travel, swag).
- Add every show you keep to the Event Calendar tab of the Planner, with its owner and attending team.
- Fill in the promotion dates when you add the show. Not later. That one habit is the difference between a promotion plan and a few posts the week before.

The 2027 Event Calendar & Promotion Planner

Make a copy of the 2027 Event Calendar & Promotion Planner to map your whole year in one place, with a promotion plan for every show.

Calendar & Promotion Planner



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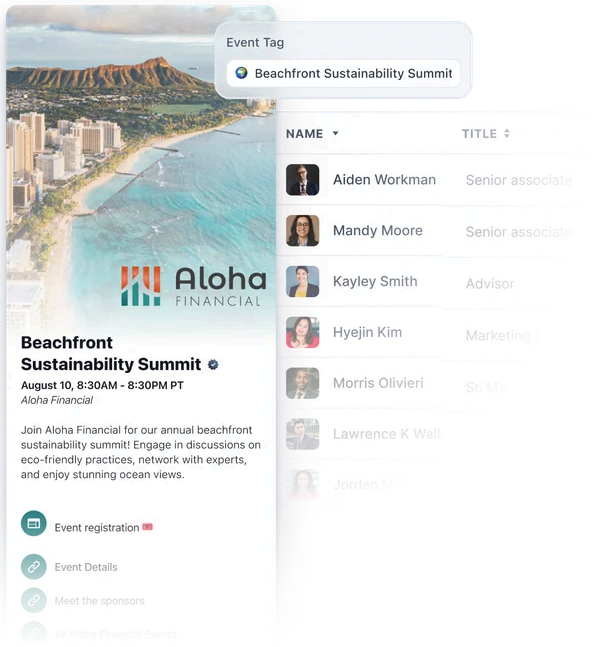
STEP 2

Set Up Before You Land

Set up the event once, and your whole team is ready before anyone lands. Setup has two parts: what people see, and what runs behind the scenes.

What people see

- Make an event card. Include your booth number or location, a short promo video, a booking link to the right person, and a floor map if the venue is big.
- Assign the card to the event. Every attendee gets their card with their booking link front and center. Buyers worth meeting plan their show weeks ahead, so give them a way to put you on their calendar before the doors open.



What runs behind the scenes

- Schedule the Company Event. Setup is easy: add the name, dates, location, description, links, notes, and booth number, then add your attending team. It turns on by itself when the event starts and tags every contact your team makes, including the happy hour and the dinner. Working a show solo? Create an individual event instead.
- Connect your CRM from the event page, or check what's already connected, so every contact syncs with the event tag attached.
- Assign a custom Lead Capture Form to the event. Two or three questions, not twenty: only what you need to qualify a lead on the spot. It applies only to the cards assigned to the event, and only while the event is running. When the event ends, those cards go back to their usual form automatically.
- Add consent fields when the event or industry calls for a higher bar. Consent is captured in the moment and travels with the contact into your CRM.

Need more help? Help Center: set up a Company Event · Help Center: Lead Capture Forms · Help Center: CRM Integrations

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STEP 3

Promote With Your Whole Company

A set number of employees work the booth, but your whole company can promote your event. Pre-event promotion deserves the same planning as the booth itself, and the easiest channel to add is the one your team already uses every day: email.

EMAILS CARRYING YOUR BOOTH NUMBER

60,000

The math. Take a 100-person company where each person sends about 40 emails a day. Run an event banner for the 15 business days before a show, and that's 60,000 emails carrying your booth number. Add an event virtual background, and every video call in that window promotes the show too.

(Our estimate: 100 employees × 40 emails a day × 15 business days. Swap in your own headcount.)

Plan your banner rotation in the Promotion Planner tab. We run three:

ABOUT 3 WEEKS OUT	1 WEEK OUT	AFTER THE EVENT
Event banner live	Banner swapped to "see you next week"	Post-event banner live

- Swap the banner as the show gets closer instead of running one for three weeks. Engagement drops after about a week.
- Add an event virtual background for the same window, with a QR code to the event card.
- Put the booking link in every outreach email your reps send before the show.
- Give every banner its own UTM link so you can see which ones drove meetings (Step 5).
- Brief your designer with the Creative Brief Template. Banner specs: 600 × 150 px, exported at 2x.

What we've seen: email signature banners were one of the top drivers of registrations for our last two webinars. It's why banners are part of every event plan we run.

Want the full banner strategy? Watch the recording of our August webinar, How We Captured Millions of Impressions With Zero Ad Spend.

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STEP 4

Capture Every Conversation

The goal on the floor is simple: no missed connections. Every good conversation gets recorded, tagged, and qualified before the next person walks up.

Pro tip: test before you travel

Test the app with your whole team before you travel, not at the booth on day one.

Capture every contact the same way

However it comes in. A badge, a business card, someone else's digital card, a QR code, or just a name typed in. It all lands in HiHello with the event tag.

Qualify on the spot

Ask your Lead Capture Form questions and add a quick note to the contact while the conversation is fresh. By the time you leave the floor, you already know who's a real opportunity.

Capture off the floor too

The event tag covers the whole event window, so the happy hour, the dinner, and the coffee line all count.

Remember that event card?

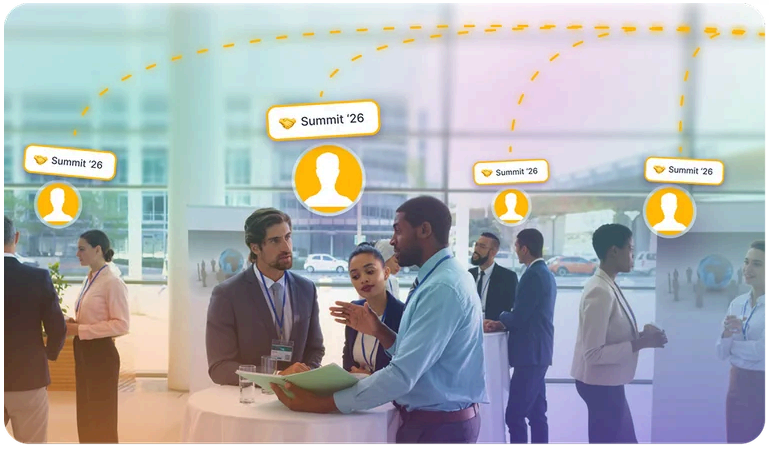
Your team already has it on their cards for the whole event. No action needed on their part.

Share from your lock screen

On iOS, your card sits on your lock screen during the event, so you can share it without unlocking your phone.

Keep capturing offline

No signal on the show floor? HiHello switches to offline mode, so your team keeps sharing and capturing, then syncs everything once you're back online.



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STEP 5

Prove the Attribution

This is the step that answers the question every event budget eventually faces: what was it worth? It starts with what your sales team does next: follow up, book the meeting, then prove the result.

Follow-Up

- Stop waiting two weeks for the lead list. Contacts sync to your CRM as they're captured, already tagged to the event, with form answers, notes, and consent attached.
- Have a nurture flow ready in your CRM that picks up event-tagged contacts automatically.
- Let HiHello nudge your team. It sends prompts before and after events, so a lead never goes cold because someone forgot to check the dashboard.
- Give your hottest leads a personal follow-up email the same day, using the notes your team took on the floor. Your post-event banner rides along in every signature.

Meetings Booked

- Make booking easy. Every follow-up email and every card share carries the booking link, so interest turns into a meeting on the calendar.
- Keep the event virtual background on for those first calls, so the meeting picks up right where the booth conversation left off.
- Log meetings booked against the event tag in your CRM, so every one counts toward the event.

Heads up on nurture: HiHello gets the lead into your CRM; your CRM or marketing automation sends the nurture.



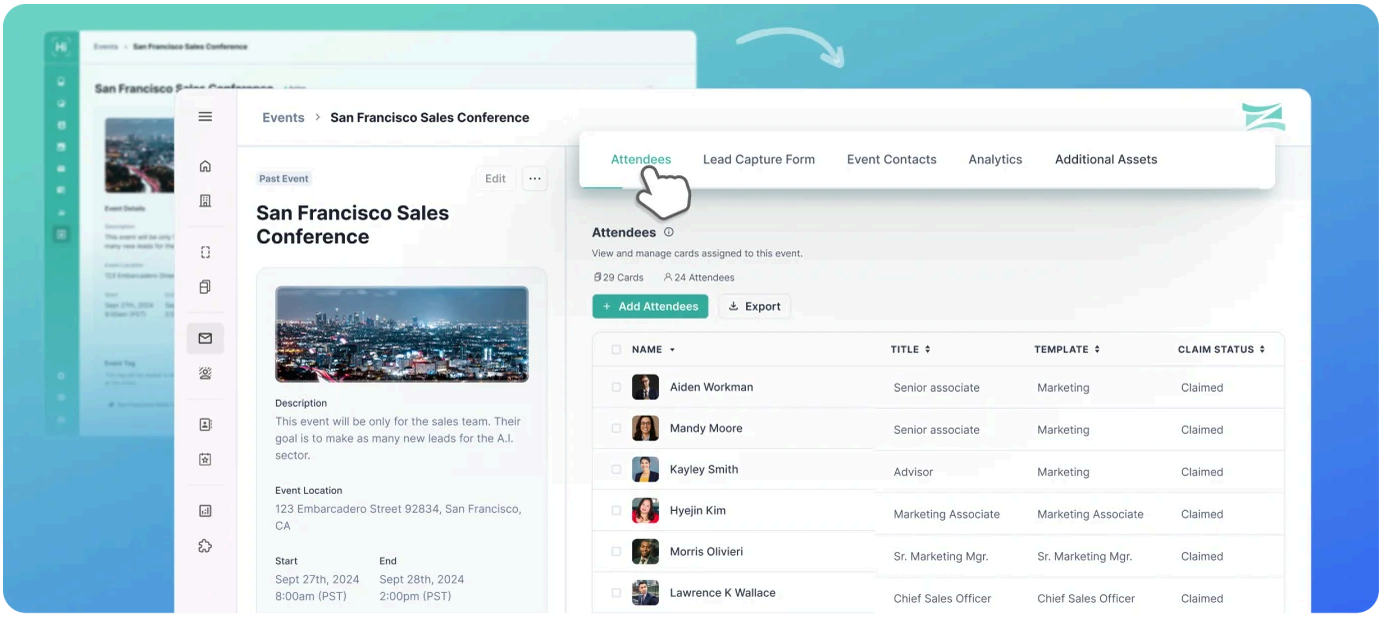
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Prove It

- Pull two reports: the HiHello event recap and your CRM's report for the event tag. If you're on an Enterprise plan and use AI, HiHello's MCP can help automate your reporting.
- Check the event leaderboard to see your top performers, right from the event page.
- Fill in the Prove It columns on your Event Calendar.
- Decide keep, change, or cut for every show, using cost per opportunity side by side across your calendar.

Contacts	Contacts captured and tagged to the event.
Opportunities	Opportunities in your CRM that carry the event tag.
Pipeline	Pipeline tied to those opportunities.
Cost per opportunity	Total event cost divided by opportunities.

Because the event tag never falls off, a deal that closes six months later still traces back to the booth. Your CRM stops undercounting your events, and next year's calendar gets built on data instead of habit.



Need more help? [Help Center: CRM Integrations]

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THE ONE-PAGE EVENT CHECKLIST

Your Event Checklist

Print one per show, or copy it into your project tool.

Event: _____ Dates: _____ Owner: _____

8+ WEEKS OUT

- [ ] Buyers in the room confirmed
- [ ] Show added to the Event Calendar with cost, owner, and team
- [ ] Promotion dates set

4 TO 6 WEEKS OUT

- [ ] Event card built (booth number, video, booking link, map)
- [ ] Event card assigned to the event and attending team
- [ ] Company Event scheduled with dates, booth number, and attendees
- [ ] CRM connected from the event page, event tag and nurture flow confirmed
- [ ] Event QR code downloaded for marketing materials and swag

3 WEEKS OUT

- [ ] Event banner live, with its own UTM link
- [ ] Event virtual background live
- [ ] Booking link in all pre-show outreach

1 WEEK OUT

- [ ] Banner swapped to "see you next week"
- [ ] Whole team has tested the app

RIGHT BEFORE THE EVENT

- [ ] Custom Lead Capture Form assigned to the event
- [ ] Consent fields added, if the event or industry needs them

DURING

- [ ] Every contact captured in the moment
- [ ] Notes added before the next conversation
- [ ] Off-floor conversations captured too

SAME DAY

- [ ] Leads in the CRM and tagged
- [ ] Nurture triggered

AFTER THE EVENT

- [ ] Event cards automatically revert to their usual lead capture form
- [ ] Post-event banner live

30 AND 90 DAYS AFTER

- [ ] Event recap and CRM report pulled
- [ ] Event scorecard completed
- [ ] Keep, change, or cut decided

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NEXT STEPS

Pick one event on your 2027 calendar, run it this way, and compare the results to the same show last year.

Already a HiHello customer? Event Lead Capture is part of the Lead Capture add-on. See the Help Center to set up your first Company Event.

Running events across a larger team? Talk to us about Lead Capture for your company.

Get the Planner (make a copy)

Watch HiHello's 2027 Event Strategy, on demand through the link in QR code below.



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