

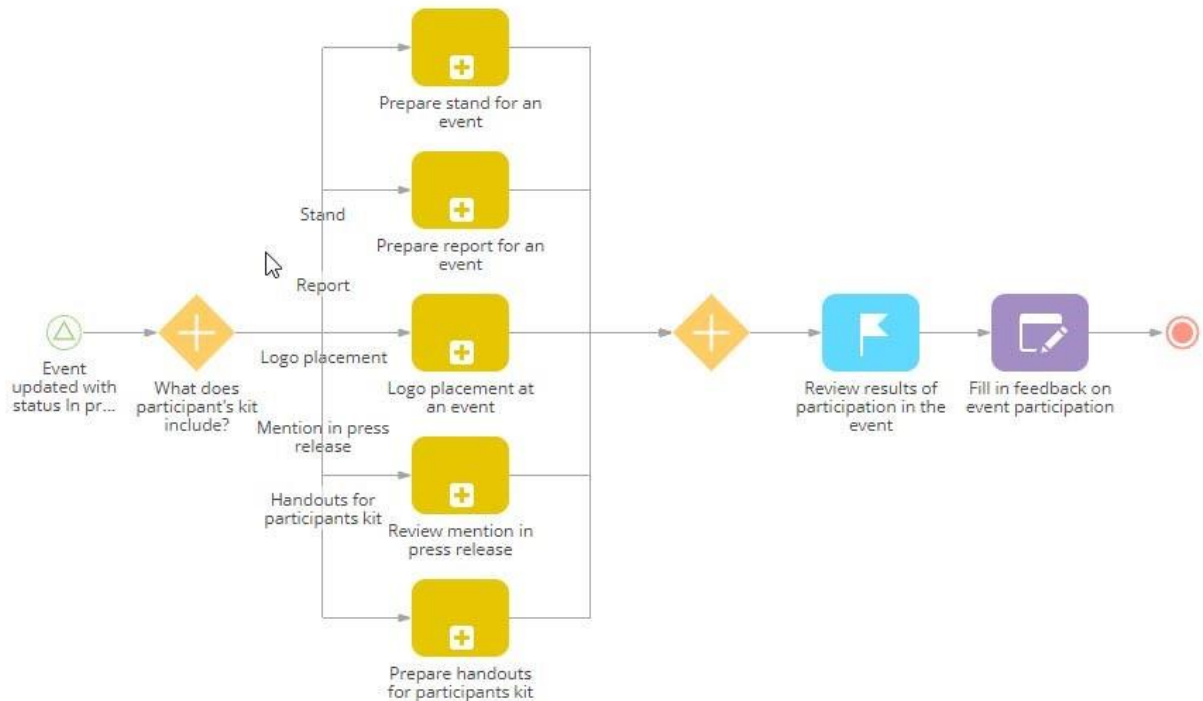
## Event participation planning

Characteristic	Definition
Assignment	<p>Schedule company participation in a marketing event</p> <p>Manage communications with event organizers, prepare marketing materials for the event</p> <p>Single storage for all event-related information</p> <p>Retrospective review of the participation in an event</p>
Field of use	Marketing
Creatio compatibility	Marketing Creatio 7.10+
List of system objects in use	<p>Basic sections:</p> <ul style="list-style-type: none"> <li>• Events</li> <li>• Contacts</li> <li>• Activities</li> </ul> <p>System section:</p> <ul style="list-style-type: none"> <li>• Users</li> </ul>

## List of process users roles

Role	Description
Event manager	<p>Manages activities to create and deliver marketing materials</p> <p>Manages requirements to be collected on time from event organizers, coordinates the the team participating in event from the organization</p> <p>Checks marketing materials placement at the event location</p> <p>Creates memo notes for participants/speakers who take part in an event from the organization</p>

## Process description



Process step	Assignee	Step description
Event updated with status "In progress"	Event manager	Event manager specifies marketing activities / materials that should be prepared for an event at the Event page > Participation details tab, and changes Event status to "In progress".
Prepare stand for an event	Event manager	To prepare demo stand for an event, event manager: <ul style="list-style-type: none"> <li>• defines the list of employees, who will work with participants at the stand;</li> <li>• provides the details required to create/prepare a stand, controls required materials production and delivery;</li> <li>• manages preparation for special events (exhibitions, demos, etc.), if they take place within an event.</li> </ul>
Prepare report for an event	Event manager	Event manager approves internally the speaker and the topic for a presentation at the event, controls how presentation is being prepared.
Logo placement at an event	Event manager	Event manager checks that logo is provided in a proper format and resolution, forwards required materials and files to the event organizers, and supervises correct logo placement at the event venue.
Review mention in press release	Event manager	Event manager checks that company name is mentioned in the event press release and validates its text; submits required changes to the press release, if any.
Prepare handouts for participants kit	Event manager	Event manager specifies estimated number of event participants, list of marketing materials for participant's toolkit. Event manager takes then control over production and delivery of marketing materials to the event venue.

Review results of participation in the event	Event manager	After event, Event manager schedules and organizes a meeting with all team members, who participated in the event, to discuss the event results and follow-ups.
Fill in feedback on event participation	Event manager	Event manager fills in all the details on the Event page to reuse in the future events.

## Implementation guidelines

1. Install the package using the [Installed applications] functionality in [System designer].
2. Add your marketing department employees (including event managers) as Creatio users.
3. Configure user's mailboxes in Creatio to send emails as part of the business process workflow.
4. To start the business process, create new Event, provide any of participation details at the Participation details tab, and set Event status to "In progress".