

Event Process

Objective

This process aims to document all the steps to organize, exhibit or participate in an event.

Application Domain

This process applies to any marketing event.

Terms & Definitions

Responsibilities

The Salesperson is responsible for attending the event and filling in or getting the Leads list.

The Marketing Team member is responsible for all the other steps.

Procedure

Planning

- From the Marketing Schedule, create a PM task for the event in the corresponding project (OSI <Region> Events)

Publishing

1. Create the event in Calendar and invite the OSI team members
2. Create and announce the event on:
 - a. <https://meetup.com>
 - b. <https://instagram.com>
 - c. <https://linkedin.com>
 - d. <https://facebook.com>
3. Send the event information to:
 - a. Our Odoo Account Manager (maybe they can do something)
 - b. Rebecca Gellatly from the OCA to get the event added to <https://odoo-community.org/events>
 - c. Valeria Vega to get a flyer for social networks and WhatsApp

4. Share the flier on:
 - a. Facebook on the OSI page
 - b. LinkedIn on the OSI page
 - c. Twitter (X)

LATAM

1. Send the event information to:
 - a. Ilona Taburet from the French Chamber of Commerce in Mexico
 - b. Maria José Dominguez from the Canadian Chamber of Commerce in Mexico
 - c. Sandra Oria Garcia from the Spanish Chamber of Commerce
 - d. Yolanda Ortiz from the German Chamber of Commerce
 - e. Cecilia Guerrero from Colliers (Torre Capita)
2. Share the flier on:
 - a. Facebook Group on the Odoo Querétaro page
 - b. WhatsApp in the following groups:
 - i. OSI LATAM
 - ii. AMOdoo
 - iii. Cluster TD Queretaro
 - iv. Canadian Chamber of Commerce
 - v. Spanish Chamber of Commerce
3. Share the links via Microsoft Teams Chat (LATAM) and request that all team members repost them on their personal LinkedIn profiles.

Before the event

1. Send reminders/Repost publications:
 - a. 2 weeks before the event
 - b. 3 days before the event
 - c. The same day of the event

During the event

1. Collect participants information
2. Take pictures of the participants

After the event

CRM

1. Fill in the Leads List and upload it into HubSpot
2. Contact the participants who did not come and investigate why

3. Add the participants that were invited to HubSpot and enroll in nurture campaign.
4. Send Thank You to those that attended with an OSI logo item, handwritten note.
5. After the meetup, send a customer satisfaction survey to all participants and non-participants. Also, distribute the event's PDF infographic to all invitees.

Content

1. Upload the pictures to the [event folder in One Drive](#)
2. Publish and share the content (pictures, slides)

Post-mortem

1. Meet internally to discuss what worked and what didn't
2. Update this process if there are lessons learned that we want to apply on the next event