Event Lead Capture Checklist

What to set up before, during and after your event, so every lead reaches your CRM.

01

Before the Event

- [ ] Define what counts as a qualified lead
- [ ] Pick what guests get right away, such as their event photos
- [ ] Choose your fields: phone, email and one qualifying question
- [ ] Add marketing opt-in as its own unticked checkbox, with wording your legal team approved
- [ ] Set up the signup path: QR code, short link and staff or brand ambassador signup
- [ ] Map your fields to your CRM and test an import
- [ ] Write your follow-up messages

02

During the Event

- [ ] Put the QR code where guests stop: backdrop, table, screens and printed materials
- [ ] Tag every lead before they leave: hot, warm or cold, plus product interest and next step
- [ ] On multi-day shows, send one useful update per day to guests who signed up
- [ ] Use the same signup at dinners, parties and side events

03

After the Event

- [ ] Export the guest list as a CSV file
- [ ] Remove guests who opted out, and keep only guests who opted in for marketing
- [ ] Add the event name, so your CRM knows which event each guest came to
- [ ] Import with the guide for HubSpot, Salesforce, Dynamics 365 or Braze
- [ ] Follow up within 48 hours, with the guest's photos and one next step

04

Measure the Results

- [ ] Signups, and signups per hour
- [ ] Opt-in answers and opt-outs
- [ ] Qualified lead rate and reply rate
- [ ] Meetings booked within 2 weeks
- [ ] Pipeline created, to compare one event with the next