FOR REVENUE-MINDED EVENT TEAMS

The Event Signal Playbook

Seven plays that turn events into pipeline.
Run these plays today with the data you already collect.
AI does the work.

INSIDE · SEVEN PLAYS

Start with the data you already have

Most AI advice for events points at some future state where the agents run the funnel and the data is finally clean. Waiting for that day costs you. It pushes off the plays you could run this quarter.

Events are the place to start. The data is first-party, it's behavioral, and it comes from people who chose to show up, which is the kind of input an AI system can act on. You're already producing it. AI is the engine here, but the signal is the advantage. Below are seven plays, each with the one metric I'd hold it to.

> "If you can't measure a play, you can't defend it in the next budget review.

Find your rung, then level up

Most teams sit at Logistics or Capture. Find where you are, then run the play that moves you up one rung. The stages map to the three pillars of event signal: **capture, deliver, orchestrate.**

STAGE	WHAT IT LOOKS LIKE	YOUR NEXT MOVE
Logistics BASELINE	Badge scans, a post-event CSV, follow-up that reaches sales days later.	**Capture role and account at registration.**
Capture PILLAR 1	Structured signals: registration roles, declared intent at check-in.	**Route those signals in real time.**
Deliver PILLAR 2	Signals hit the CRM and Slack in seconds; reps act while buyers are on site.	**Score and prioritize with AI.**
Orchestrate PILLAR 3	Portfolio analytics, closed-loop ROI, AI triage across every event.	**Reallocate budget to what produces pipeline.**

01 CAPTURE

Read registration as a buying committee signal

The play. Cluster registrations by account and role as they arrive, and hand sales an account-level brief before the doors open instead of a list of names.

Why it works. When three people from one account register, they've already talked about it internally. Add different job functions and you're usually looking at a live evaluation.

STARTER · USE THIS TODAY

ACCOUNT	REGISTRANTS	FUNCTIONS	FLAG
Northwind Logistics	3	VP Ops, IT Dir, Finance	Buying committee
Acme Health	2	Demand Gen, RevOps	Watch
Globex	1	Analyst	Monitor

MEASURE

The number of accounts you flagged with 2+ registrants, and what share of them you had a planned conversation with on site.

02 CAPTURE

Turn check-in into a real-time sensor

The play. Route VIP and target-account arrivals to the account owner's phone in seconds, and detect when colleagues from one account arrive within minutes of each other.

Why it works. Check-in is the most concentrated buying signal you get from a person all year. In most stacks it becomes a tally and a badge.

STARTER · USE THIS TODAY

field-alerts   now

Event alerts 9:02 AM

VIP ARRIVAL **Dana Cole, CFO, Northwind Logistics**

Checked in 9:02am · 2 colleagues on site · open opp **$180k**

Owner @j.rivera · say hi before the 10:00am keynote

MEASURE

Time from arrival to rep notification, in seconds, and same-day or next-day meetings booked from on-site alerts.

03 | CAPTURE

Ask declared intent questions at badge pick-up

The play. Add four or five questions at check-in and pipe the answers straight to the CRM as structured fields, not notes someone transcribes later.

Why it works. Behavioral data tells you what someone did. Declared answers tell you what they came to solve, from a verified buyer at peak attention.

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BADGE CHECK-IN

1 **Where are you in evaluating a solution like this?**

Just exploring | Actively comparing | Ready to decide

2 **What is your role in that decision?**

Researching | Recommending | Approving budget

3 **Which 2026 initiative brought you here?**

Short answer

4 **What do you use for this today?**

Short answer

5 **Want 15 minutes with our team before you leave?**

Yes | No

MEASURE
Share of attendees who complete the questions, and the share of records carrying a declared evaluation stage.

04 | DELIVER

Deliver signals in hours, not days

The play. Wire event signals to flow into any app, including Salesforce, Marketo, Eloqua, HubSpot, and Slack automatically, with enough context that your team knows why it matters now.

Why it works. MarketingProfs found **74%** of B2B teams take four or more days to follow up, and only **2%** reach the prospect the same day.

STARTER · USE THIS TODAY

```
WHEN  check-in.account is in target_account_list
AND   attendee.title contains (VP, Chief, Director)

THEN create Salesforce task + post to #field-alerts
       within 60 seconds, assigned to the account owner

ELSE enrich and add to nurture (no live alert)
```

MEASURE
Median time-to-first-touch, in hours, and the percentage of high-intent signals actioned within 72 hours.

05 | ORCHESTRATE

Use AI recommendations to deepen engagement

The play. Turn on AI session and networking recommendations for your next event, and let what attendees accept feed your intent picture.

Why it works. A richer attendee day means more signal and more reason to come back. The sessions someone accepts are themselves a signal.

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Rank each attendee's sessions by:

profile match (role, industry)	**40%**
goals stated at registration	**35%**
in-event behavior (taps, dwell)	**25%**

Serve top 3 via app + email. Log accept / decline as intent.

MEASURE

Recommendation acceptance rate, and sessions attended per attendee versus a prior event.

06 | ORCHESTRATE

Let AI prioritize and draft the follow-up

The play. Score post-event signals by intent, surface the top accounts first, and pre-draft outreach that references the session attended or the answer declared at check-in.

Why it works. A rep comes home with hundreds of contacts and no obvious order to work them. AI handles the triage, so the rep edits and sends instead of starting from a blank screen.

STARTER · USE THIS TODAY

- **A** declared 'ready to decide' OR booked a meeting
- **B** 2+ sessions on one topic OR committee cluster
- **C** single scan, no declared intent

AI DRAFT · TIER A

"You asked about [topic] at [session]. Here's the short answer, plus how three teams your size rolled it out. 15 minutes Thursday?"

MEASURE

High-intent signals contacted within 24 to 72 hours, and reply rate on signal-based outreach versus the standard sequence.

07 | ORCHESTRATE

Run portfolio analysis to justify the budget

The play. Consolidate event data into one analytics layer and compare cost-per-qualified-opportunity across formats, regions, and sessions each quarter.

Why it works. The KPI conversation has moved from lead volume to meetings and pipeline. Finance doesn't count badges, it counts qualified opportunities. The Spring 2026 CMO Survey (Deloitte, Duke, AMA) found **marketing gets cut 45% of the time profits fall short**, so a number finance recognizes is what protects the line.

STARTER · USE THIS TODAY

$$\textbf{Cost per qualified opportunity (CPQO)} = \frac{\text{total event investment}}{\text{qualified opps sourced or influenced}}$$

$$\textbf{Cost per ICP meeting} = \frac{\text{total event investment}}{\text{ICP-fit meetings booked}}$$

Stop dividing by badge scans. Divide by what the board counts.

MEASURE

Cost-per-qualified-opportunity by format, and the budget you reallocate as a result.

HOW IT FITS TOGETHER

The Event Signal Stack

How the seven plays connect: capture signals, deliver them in seconds, act on them wherever your teams work and conversion to revenue accelerates.

1 CAPTURE SIGNALS

Check-in app

Check-in & badge intelligence. Who arrived, when, with whom.

Easy event builder

Fast registration pages. Role & account at sign-up.

Mobile app

In-event engagement. Sessions, polls, booth taps.

AI event guide

AI recommendations. Sessions, exhibitors, matches.

2 DELIVER

Real-time signal routing

Cleans, maps, and routes every signal in real time. No batch exports, no lag. Self-healing retry queue.

in seconds

3 ORCHESTRATE

Where your team already works

- Salesforce
- Marketo
- Eloqua
- HubSpot
- Slack

→ Rep alerted while the buyer is still in the room.

Portfolio analytics

Portfolio analytics across every event. Cost-per-qualified-opportunity, closed-loop ROI.

Pipeline you can prove

Event-sourced pipeline tied to closed-won, defensible in the next budget review.

START HERE

Start with one

You don't need all seven running this week. Pick the one play that fixes your most expensive gap. If follow-up is slow, start with routing. If the board keeps questioning event ROI, the portfolio analysis is the place to begin. Teams whose reps walk in blind should start by clustering registration data.

Run one play, measure it honestly, and let the result fund the next one.

Run your first play this quarter →

COMING NEXT · PART 2

Part 1 showed you the plays.
Part 2 shows you how to run them without stitching together five tools.