

The background features a white central area with rounded corners, surrounded by abstract, overlapping shapes in shades of orange, red, and teal. The shapes are positioned at the corners and edges, creating a modern, geometric aesthetic.

Beyond the Booth:

B2B Sales Strategies for Field Events

Nick Sal | Sept. 5th 2025



Hi there! I'm
Nick "Sal"vatoriello

Lead Event Facilitator, Next Level Inbound

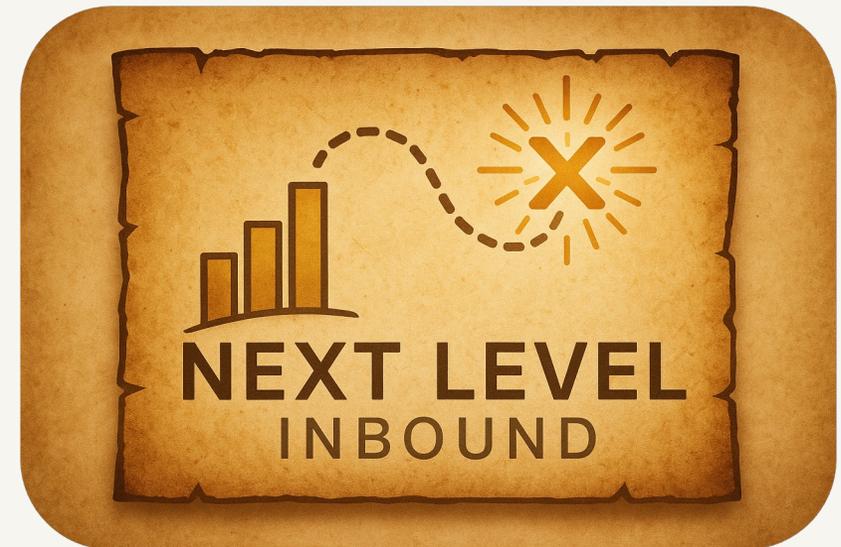
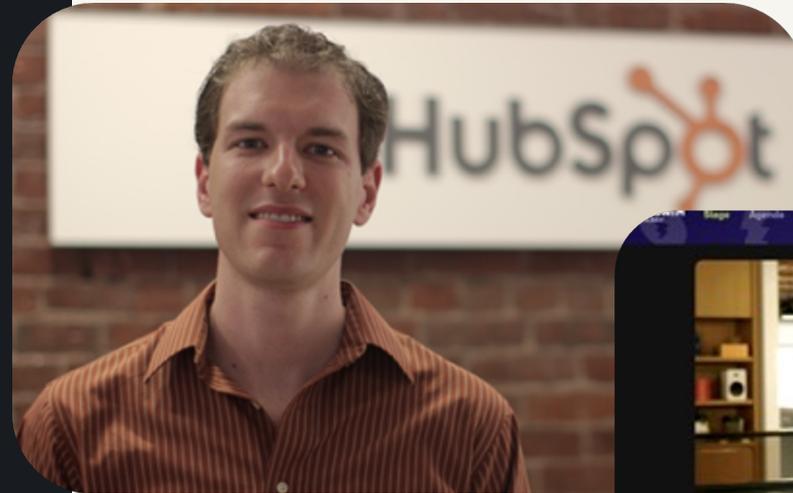
NEXT LEVEL
INBOUND

Nice to meet you

My background:

- ▶ Worked at HubSpot for 5 years, through their IPO
- ▶ Worked at 4 leading HubSpot Solutions Partners
- ▶ 4th time hosting a break-out session at INBOUND
- ▶ 1st time as founder and CEO of my own business!
- ▶ Have been paid to help host over 250 events

Thank you for joining me today



Aren't Field Events GREAT?!

01

Whether it a tradeshow, dinner, roadshow, workshop, virtual event/webinar, they're great at driving direct connections and experiences

02

Sales can use these to connect with a large number of targets more easily and efficiently – all in one space/time

03

Marketing can more effectively generate leads/pipeline

04

When done consistently, they can build a lasting community and spark a movement.... just look at INBOUND!

So...what's the challenge for us Field Event Pros?

Do these sound familiar?

01

Sales/Marketing Misalignment

02

Poorly organized events don't engage

03

Follow-up is broken, and field events are underleveraged

“

They asked for this event,
said it was crucial for sales.
But then nobody showed up. ”

- Said at least once by every B2B field marketer

What Sets Sales-Driving Field Events Apart?

They go the best when there's someone owning each of the following:



Aligning leadership
and securing buy-in.



Strong project management:
Planning every detail
with templates and
checklists.



Executing seamlessly
with entertaining as
well as educational
content.



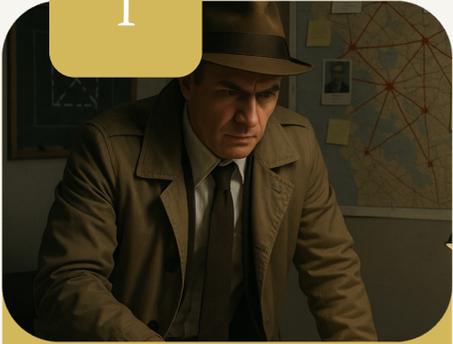
Following up smartly
to capitalize on
event momentum.

Want to get there with
your next field event?



The High-Performance Field Event Formula

1



**Identify Key
Targets**

2



**Warm Them
Up with
Content**

3



**Engage &
Qualify at
the Event**

4



**Follow Up with
Sales Love**

5



**Report ROI
& Refine**

Part 1

Identify Key Targets



“

Don't just invite everyone.
Invite the right people—and know
why they matter to your team
before the event even begins.”

– Nick Salvatoriello

Identify Key Targets

Goals



- ▶ Align with sales pre-event
- ▶ Use intent + fit + relationship data to prioritize contacts
- ▶ Build segmented invite lists

Key Tools



1. Event Brief Template
2. Event Goals & Budget Calculator
3. Targeting & Segmentation Worksheet (w/SLA)

Segment Lists in HubSpot



Executive invites



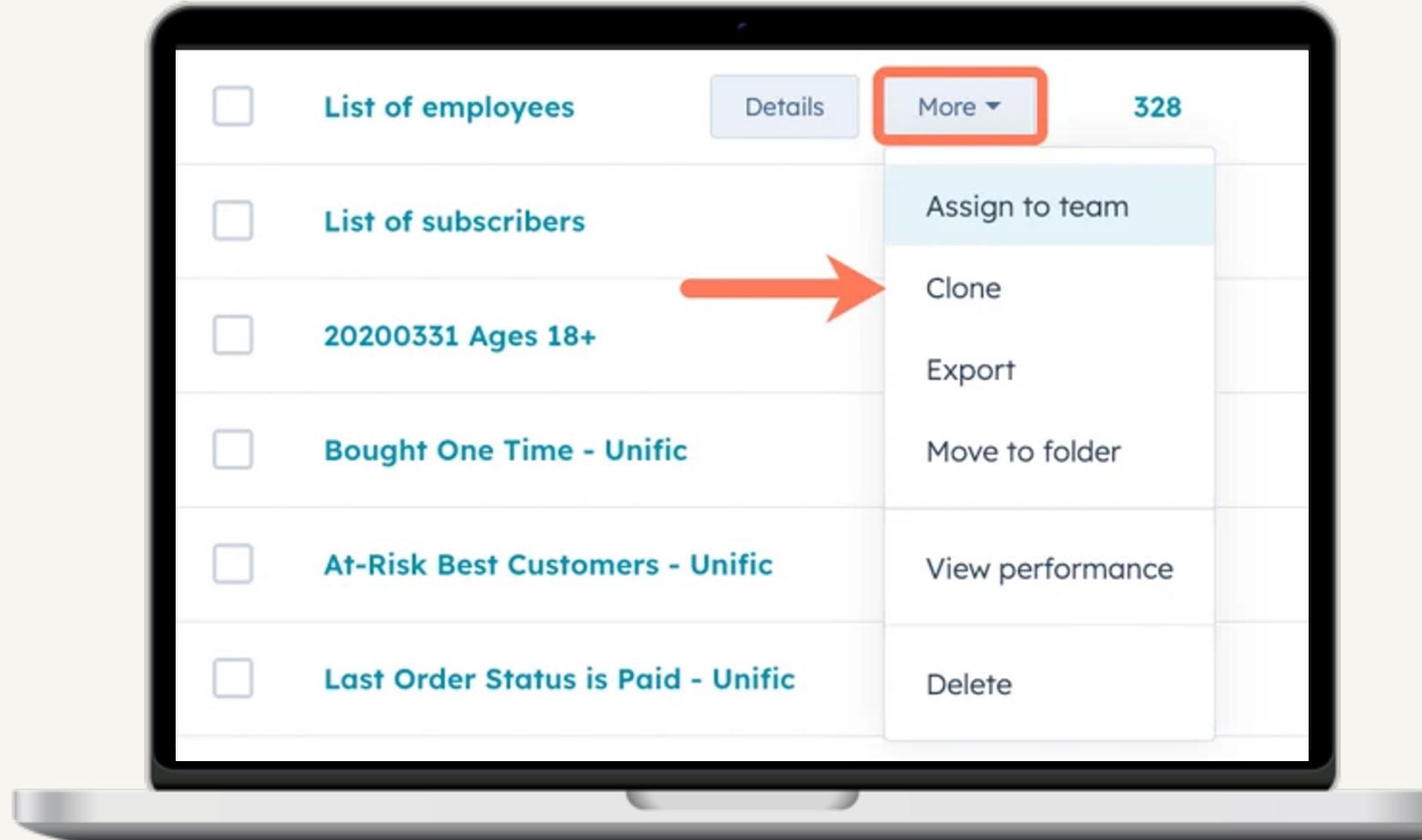
Personalized sales invites



General marketing invites



Social/ad invites



Quick “pair-share”

What’s a challenge your target prospects care about that you could build an event around?



Part 2

Warm Them Up With Content



“

The event experience
starts the moment your
guests learn that it exists ”

– Priya Parker, The Art of Gathering

Warm Them Up With Content

Goals



- ▶ Personalized invites
- ▶ Thought leadership blogs/podcasts
- ▶ Event teasers on social
- ▶ Email sequences

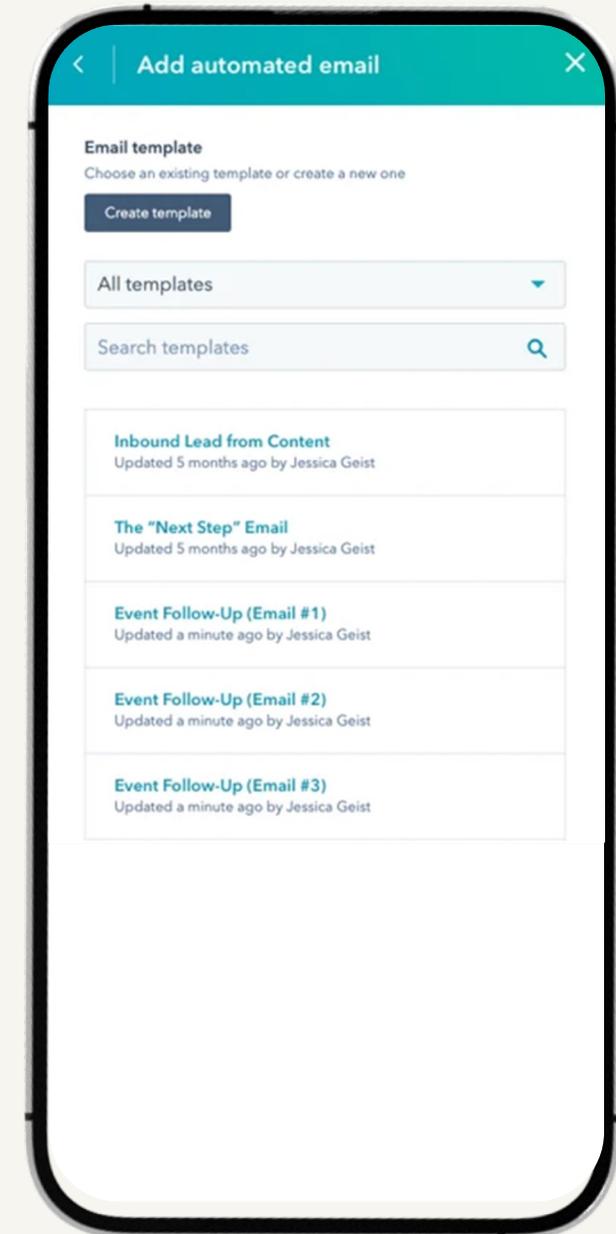
Key Tools



1. Social event teaser template
2. Email sequence outline
3. Thought leadership post template

Setting Up Pre-Event Email Sequences in HubSpot

Driving Engagement Before the Show



Making It Easy For Sales To Support

Enable sales for success with their contacts who RSVP

After RSVP

~2-3 days out

Task Title:

"Review Contact & Personalize Pre-Event Outreach"

Task Description:

Check CRM record for this contact.
Review key info.

Send a short, personal message (email or LinkedIn DM) welcoming them and referencing what they might enjoy or benefit from at the event. Use context tied to their role or recent activity.

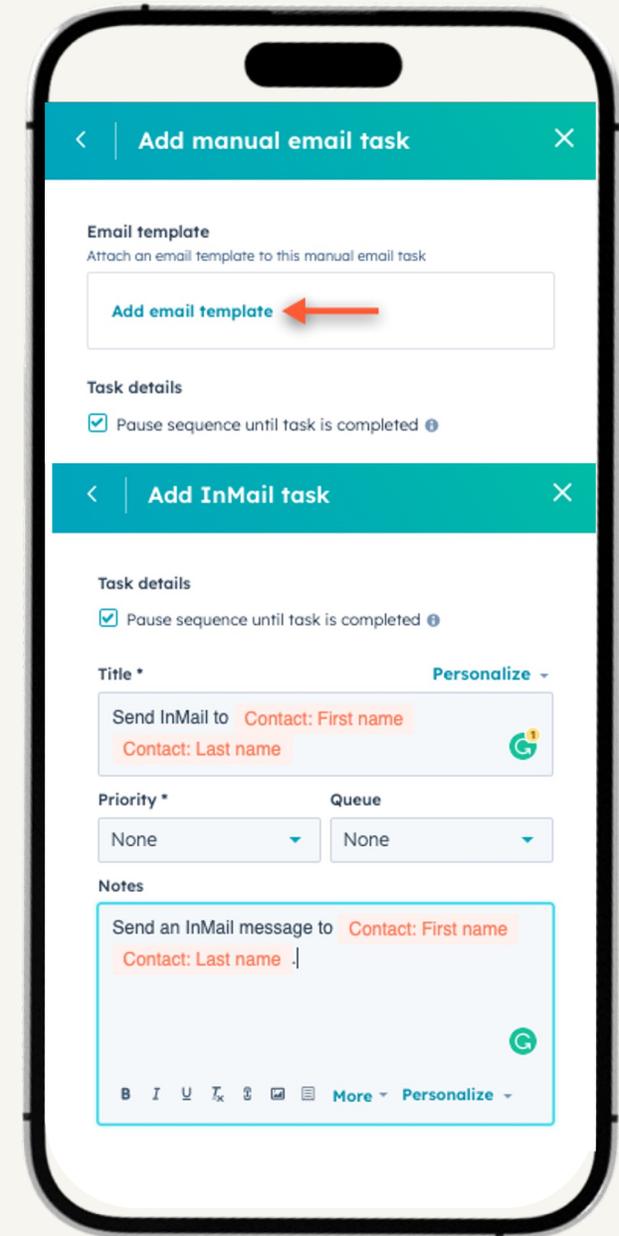
Task Title:

"Confirm Attendance & Prep Talking Points"

Task Description:

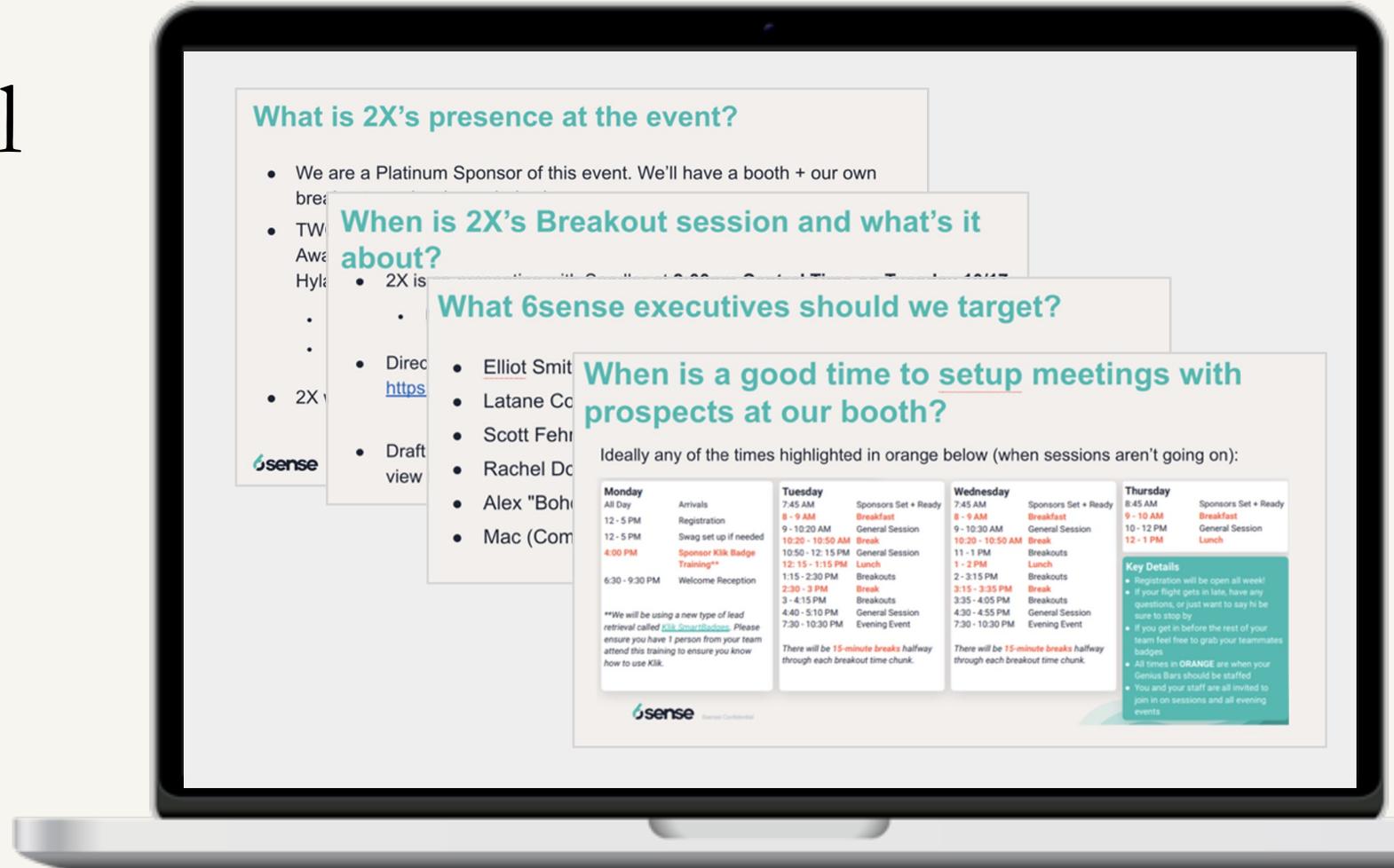
Let them know you're looking forward to connecting.

Prep 1–2 personalized talking points based on their goals or pain points. Review event theme so you're ready to engage in context.



Don't forget to warm up your sales team as well

Create a customized "know before we go" deck and go over with the team



Part 3

Engage & Qualify At The Event



Engage & Qualify at the Event

Goals



- ▶ Plan/design interactive elements
- ▶ Assign roles: greeter, demo-er, scheduler
- ▶ Use tablets, QR codes, lead scoring forms
- ▶ Tag lifecycle stage, trigger auto-notes/tasks

Key Tools



1. Run of Show template
2. Event Roles and Staffing schedule example



- Emcee Nick Sal

“
If you want high-
performance, you better
put on a performance.”

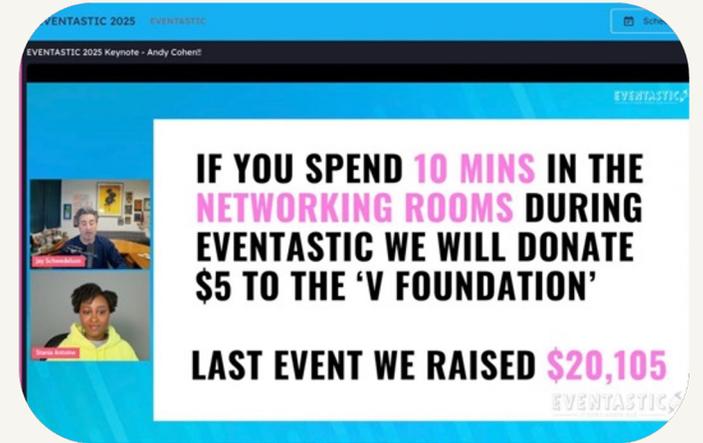
Engaging

Use compelling, entertaining cues to capture attention and get your audience leaning in

Treat it like a show



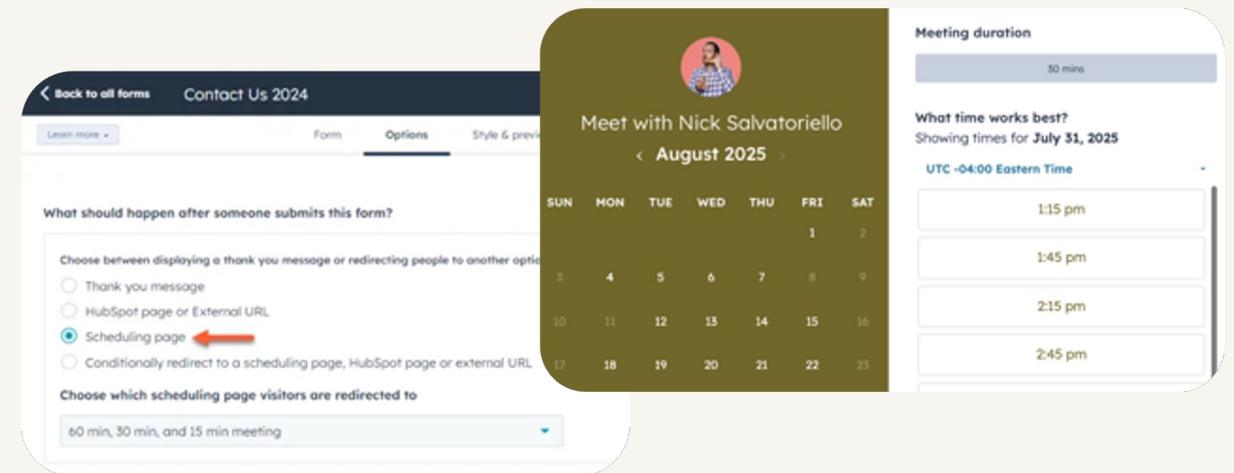
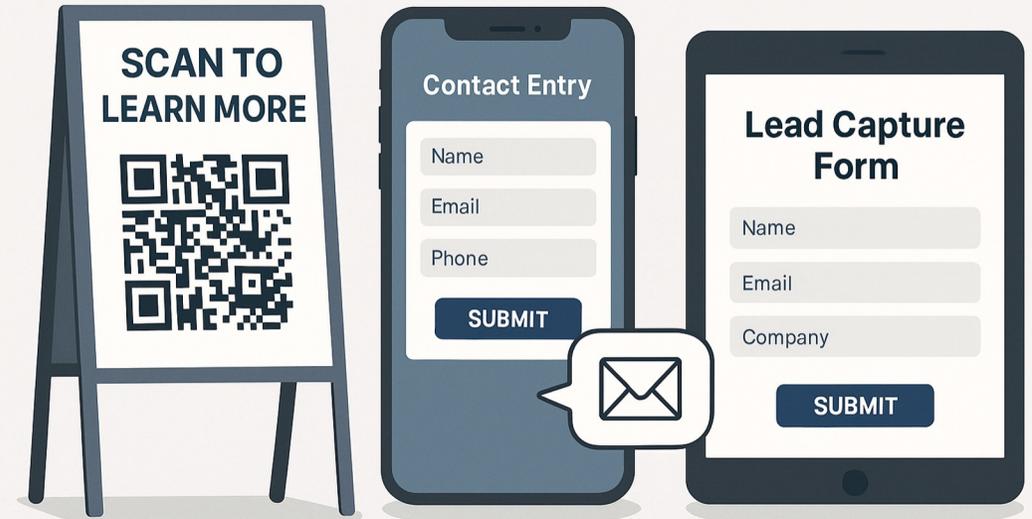
- ▶ Event Branding
- ▶ High-energy host/emcee
- ▶ Music/movies
- ▶ Tight transitions
- ▶ Interactive elements
- ▶ Challenges/Giveaways
- ▶ The unexpected



Qualifying

Use tablets, QR codes, lead scoring forms, and your talented team

- ▶ QR signage
- ▶ Mobile contact entry
- ▶ Automated text/email
- ▶ Automated follow up tasks for reps
- ▶ Automated meeting booking
- ▶ Automated tracking for report



What about Virtual Field Events?

Tons more data points
to qualify with:



- ▶ Signup forms
- ▶ Live poll responses
- ▶ Session choices
(speakers, breakouts, downloads)
- ▶ Chat transcripts
- ▶ Survey submission answers
- ▶ On-demand viewing/sharing activity
- ▶ Post-event community engagement

Quick poll

Who's currently assigning specific roles for reps at their field events?



TRIVIA

How much higher are engagement rates in webinars that incorporate interactive elements (like polls and Q&A) compared to those that don't?

- A 20% higher
- B 30% higher
- C 50% higher
- D 70% higher

Answer:

- C HubSpot reports that webinars using interactive tools like polls and Q&A have a 50% higher engagement rate.

Storytime....

Here's how we entertained in order to gain attention for education.



Then here's how we engaged and qualified them.

SmartBug.
Digital Event 04/2
1 PM EST

Agentic AI in Sales
Part 2 of A SmartBug Event Series for Actionable AI

With insights from

 **Will Hughes**
Senior Product Manager
HubSpot

 **Sam Mallikarjunan**
Growth Lead
agent.ai

 **Mathieu Grandmaitre**
AI Solutions Architect
SmartBug.

 **Nick Sal**
Your Host and HubSpot Academy Alum

Part 4

Follow Up With Sales Love





- Emcee Nick Sal

“

Most field event follow-up emails sound like this:
‘Thanks for stopping by.’
Let’s do better.

”

Follow up with automation and sales love

Goals



- ▶ Post-event sequence
- ▶ Auto-tasks for reps
- ▶ Use engagement + qualification data to personalize messages

Key Tools



1. HubSpot sequences, smart content
2. Rep f/u task template
3. Attendee take-away email template

Post-Event – Automate With Personality



Sequences for reps: follow-up at scale, personalized



Smart content: adjust emails by interest, session, etc.



Workflows to create tasks or move to deals



Syncing with sales pipeline in real time

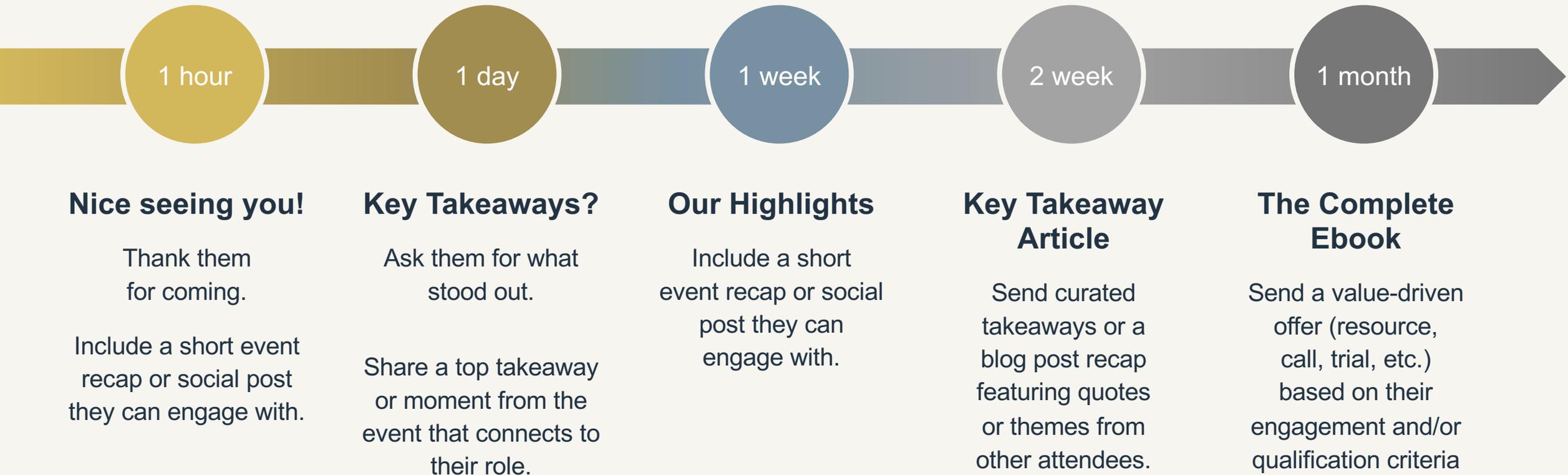


Build **follow-up KPI's** for your sales team



Drive ROI with **Event-Specific Offers**
(ex/ Trade Show Bargain: Save 45%)

Post-Event Sales Sequence Example in HubSpot



Quick poll

Who's ever created a post event article/ebook featuring attendee quotes and takeaways?



Part 5

Report & Refine





- Emcee Nick Sal

“

Don't just count leads—
tell the story. That's how
you earn the sequel. ”

Report, Refine, Align

Goals



- ▶ Visualize contact journeys
- ▶ Share stories, not just stats
- ▶ Use data to improve next event

Key Tools



1. Event KPI tracker
2. Post-Event Sales Enablement Deck
3. Event Debrief + Next Step Meeting Outline

Report the ROI to build alignment and momentum

When you report the outcomes, be sure pull together the data and make a profile/tell a story about your contacts who registered/engaged with you at your event.

The Journey for Our Audience



Free	Free	\$	\$\$	\$\$\$
> Millions of People	~50,000 people	~5,000 people	~1,000 people	~75 clients

Access to our audience: \$\$\$

The Stories - How did they become prospects?

Monica Smith

- Monica, who landed on a blog article before anything else, started immediately reading other articles.
- From there, she read about Trim-Life, and then the Six-Day program.
- Finally, after viewing around 60 pages, she decided to convert on *The Ultimate Guide to Clinical Hypnotherapy Techniques*.
- She also subscribed to the blog at this point.

Kathie Freeburg

- Kathie, who landed on the Six-Day Program page before anything else, started reading other content related to the Six-Day program.
- Within just a few moments, she had already downloaded the Six-Day Program course guide.
- During this process, she *also* subscribed to the blog.

Track and Segment Event Engagement in HubSpot

Marketing events Actions

Second test

Completed

Marketing event information

Description

Organizer

Type

Start date
04/03/2024 8:00 AM EDT

End date
07/01/2024 8:00 AM EDT

URL
--

[View all properties](#) [View property history](#)

Overview

REGISTRATIONS: 7 CANCELLATIONS: - ATTENDEES: 3

Associated campaign

NAME
test

Lists

Lists added through filters

NAME	TYPE
Attendees	Active

Imports

04/03/2024 10:29 - attended second test Complete

Lead Scoring

Manual Lead Scoring Predictive Lead Scoring

Positive Attributes + Add new set

Score: 5 ✎ Actions

The contact property **Last Registered Event** is known. ✎

AND

Activities

Search activities

Filter by: Filter activity (35/35) All users All teams

March 2025

- List membership: Laura H was added to Test marketing event updated.csv Mar 14, 2025 at 4:36 PM GMT
- Invoice activity: Invoice INV-1004 was sent by a subscription. Mar 13, 2025 at 10:21 AM GMT
- Invoice activity: Invoice INV-1004 was finalized. Mar 13, 2025 at 10:21 AM GMT

February 2025

- Note by Laura Outlook test user: <https://app.hubspot.com/contacts/20708412/record/0-1/1/> Feb 12, 2025 at 9:44 AM GMT
- Note by Laura Outlook test user: Feb 12, 2025 at 9:39 AM GMT

Marketing events (1)

In person members event

Type: In person event

Registration status: Registered

Registration date: 15/01/2025 00:00:00

Participation status: Attended

Participation date: 30/01/2025 00:00:00

Event start date: 30/01/2025 08:00:00

Event end date: 30/01/2025 18:00:00

NEXT LEVEL!

Spark a Community



Spark a Community

Goals



- ▶ Capitalize on event momentum
- ▶ Gain buy in for future participation
- ▶ Get your participants involved in planning/promoting

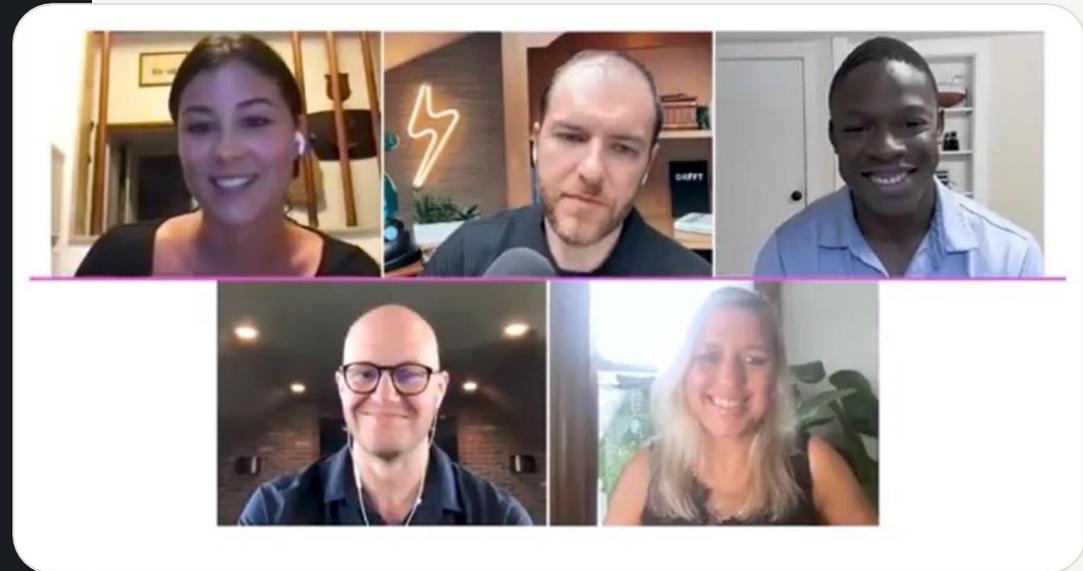
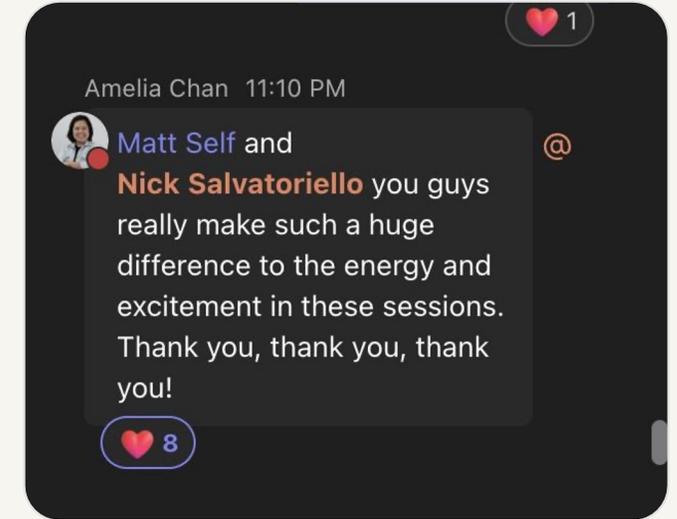
Key Tools



1. A hub for your community
2. Dedicated community manager
3. Dedicated event budget

A Facilitator for Your Community Helps With:

- ▶ Gaining buy-in and alignment from execs
- ▶ Providing ongoing planning + project management
- ▶ Expertise at the Event Emcee role
- ▶ Confidence in finding and approaching creators, sponsors and partners
- ▶ User-focused workshops to get things done / create value
- ▶ Co-creating episodic experiences with your biggest fans



Let's Recap



If you want to bake
this sales cake

These are
some key
ingredients

01

Having a “Lead Facilitator” for the event is key to align with sales and other stakeholders

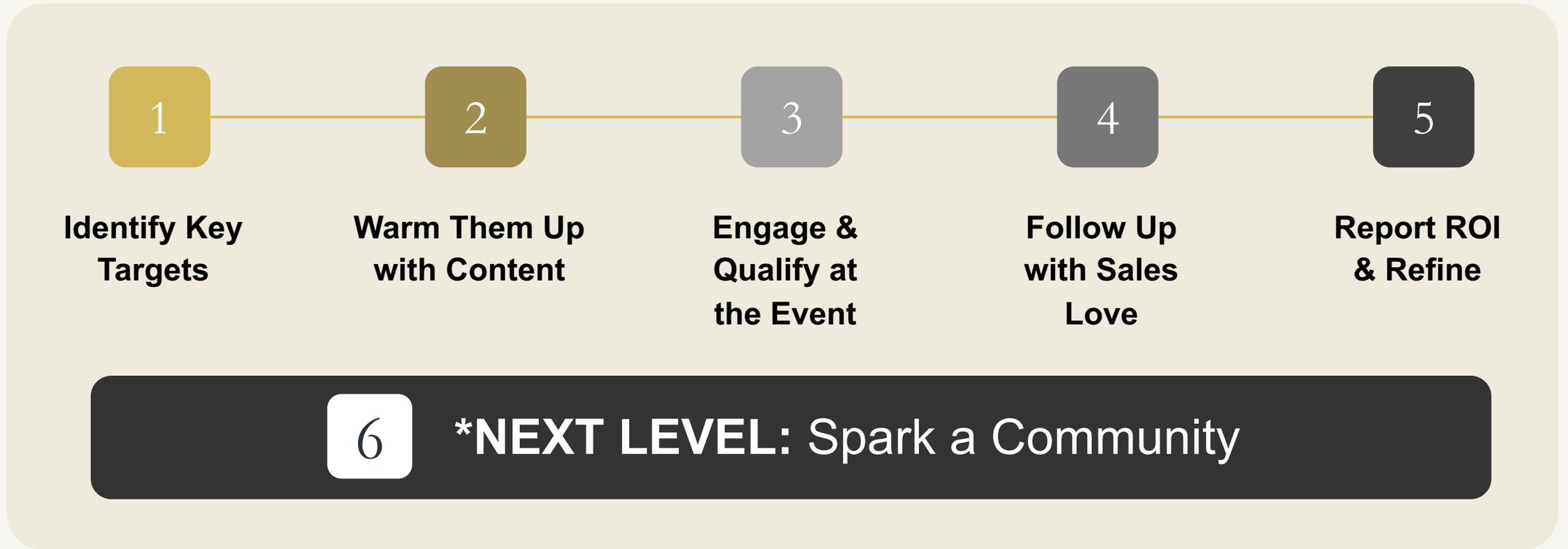
02

Having a “high performance” culture is key to create attractive and engaging experiences for your participants

03

Leveraging tools like marketing automation, CRM and Project Management frameworks are key to ensure consistent, trackable execution (pre/during/post)

The High-Performance Event Formula



Free Resources +
Meetup To Help Your
Next Field Event



FREE Templates

Here are the core tools I use to streamline field event planning:

- ▶ **Event Brief Template:** A single source of truth for event goals, logistics.
- ▶ **Run of Show (ROS):** A minute-by-minute plan for seamless execution.
- ▶ **Logistics Checklist:** Prevent surprises by ensuring every element is tracked.
- ▶ **Promotion Plan:** Align your audience, messaging, and budget.
- ▶ **KPI Dashboard:** Measure success and optimize future events.



Join me on a free follow-up event

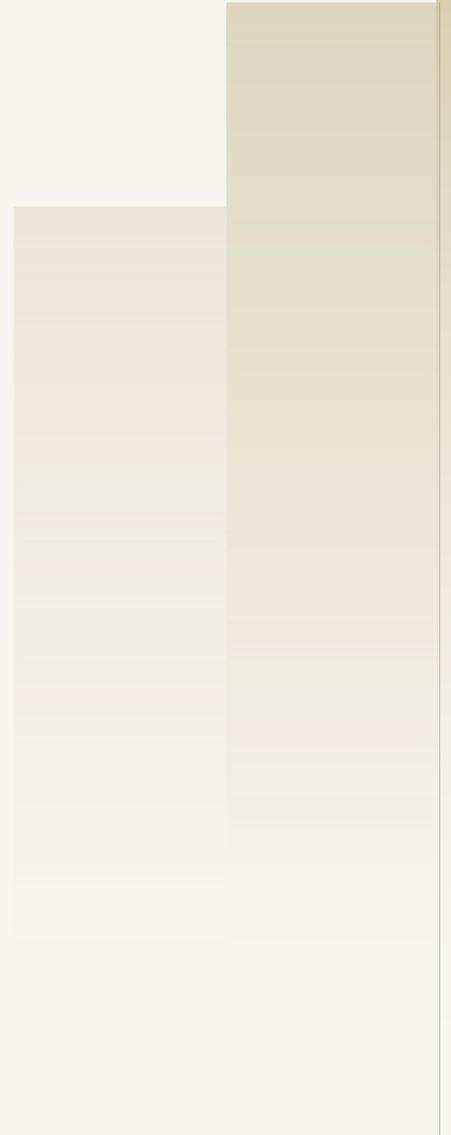
Scan this QR code or head to

nextlevelinbound.com/btb



NEXT LEVEL
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Thank You!



NEXT LEVEL
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