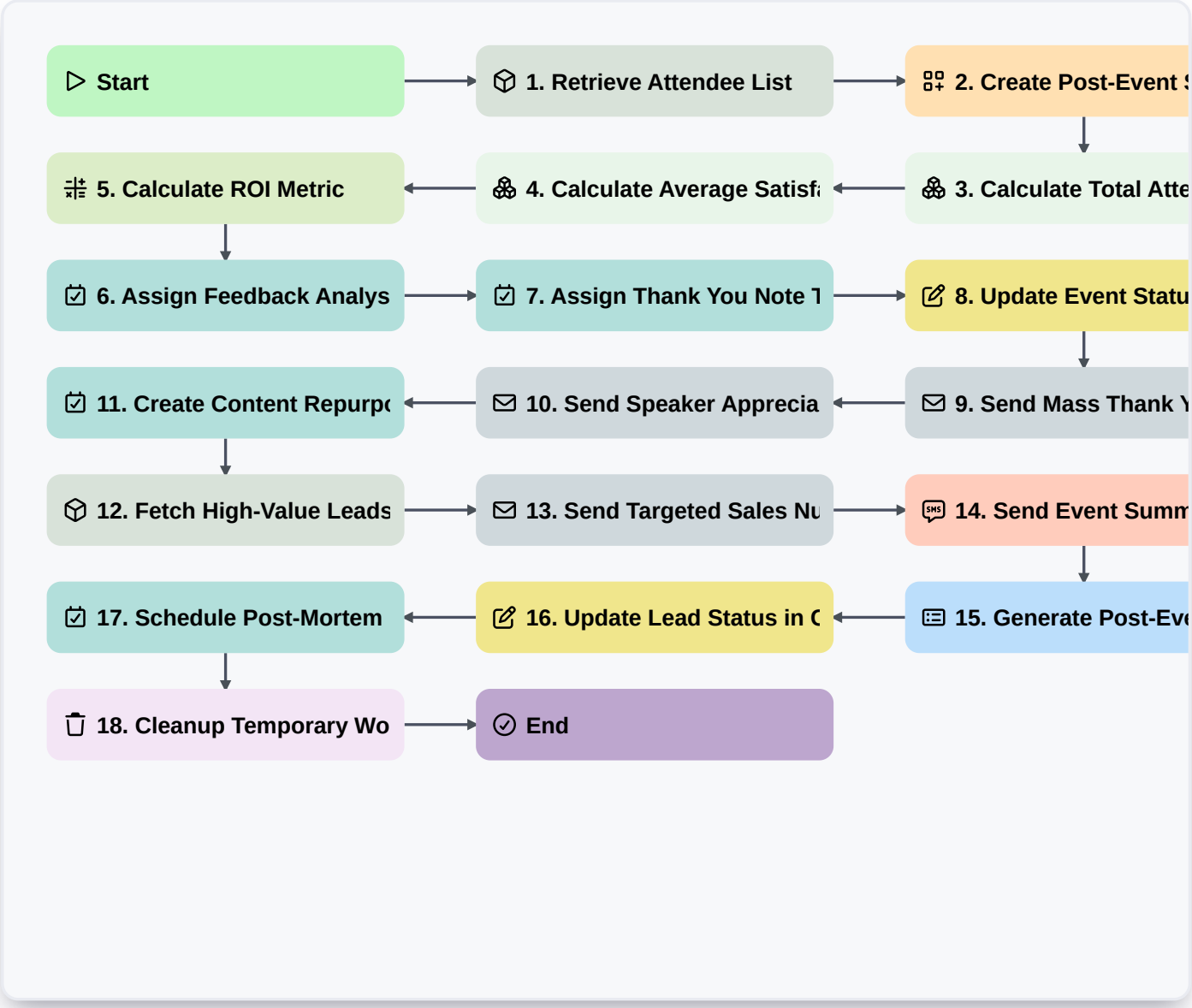
ChecklistGuro

Event Follow-Up And Post-Event Nurturing Process



Start
Start of the Workflow/Process.

1. Retrieve Attendee List
Fetch all entries from the 'Event Attendees' data model for the specific event ID.

2. Create Post-Event Summary Entry
Create a new entry in the 'Event Reports' data model to serve as the master record for this follow-up cycle.

3. Calculate Total Attendance
Sum the number of 'Checked-in' attendees from the Attendee list to get total event reach.

4. Calculate Average Satisfaction Score
Calculate the average of 'Survey Score' fields from attendee feedback entries.

5. Calculate ROI Metric
Execute a formula comparing 'Total Event Cost' vs 'Estimated Lead Value' gathered from attendee data.

6. Assign Feedback Analysis Task
Create a task for the Marketing Manager to review and categorize qualitative survey comments.

7. Assign Thank You Note Task
Create a task for the Account Executive to send personalized follow-ups to VIP attendees.

8. Update Event Status
Update the status of the 'Event' data entry from 'Live' to 'Post-Event Processing'.

9. Send Mass Thank You Email
Send a standardized 'Thank You for Attending' email to all entries retrieved in the Attendee List.

10. Send Speaker Appreciation Email
Send a personalized email to the speakers listed in the Event Data Model.

11. Create Content Repurposing Task
Create a task for the Content Team to turn event recordings/photos into social media posts.

12. Fetch High-Value Leads
Filter the attendee list to identify entries marked with 'High Intent' or 'Decision Maker' status.

13. Send Targeted Sales Nurture
Send a specific follow-up email containing a whitepaper or demo link to the High-Value Leads identified.

14. Send Event Summary SMS
Send a short text message to VIP attendees with a link to the event photo gallery.

15. Generate Post-Event Performance Report
Generate a formal report summarizing attendance, satisfaction, and ROI for stakeholders.

16. Update Lead Status in CRM
Update the 'Lead Status' field in the Lead Data Model to 'Nurturing' for all attendees.

17. Schedule Post-Mortem Meeting
Create a task to schedule an internal team meeting to discuss event learnings.

18. Cleanup Temporary Workshop Data
Delete temporary session-specific data entries that are no longer needed after the event concludes.

End
End of the Workflow/Process.