

Hybrid Event Marketing Checklist

Plan one coordinated campaign for two attendance modes. Use this printable workbook to assign owners, separate the in-person and virtual promise, sequence promotion, protect accessibility and consent, and review results.

Key principle: comparable value does not require identical messaging. Be explicit about what each audience receives, how they access it, and what happens next.

1. Campaign brief

Complete this before producing channel assets. Adapt the lead time to event size, procurement and production complexity.

Event and date	_____
Primary outcome	_____
Primary CTA	_____
Campaign lead	_____
Budget owner	_____
Review cadence	_____

- ☐ Write one event promise that both attendance modes can understand.
- ☐ Define what is shared, in-person only, virtual only, live, recorded and included in each ticket.
- ☐ Set success measures and identify the system that owns each measure.
- ☐ Name the approval owner for copy, visuals, paid media, privacy and accessibility.
- ☐ Create one source of truth for dates, time zones, venue, access, replay terms and support contacts.

2. Audience decisions

Segment only when it improves relevance or access. Do not collect or infer personal data that the campaign does not need.

- ☐ Attendance mode: in-person, virtual, flexible or undecided.
- ☐ Location and time zone: travel feasibility, local outreach and remote schedule clarity.
- ☐ Ticket type: price, capacity, access, replay rights and deadline.
- ☐ Lifecycle stage: prospect, page visitor, registrant, attendee, no-show or replay viewer.
- ☐ Source or partner: owned, speaker, sponsor, affiliate, earned, organic social or paid.
- ☐ Accessibility and language needs: explain available support and provide a contact route.
- ☐ Content interest: use declared interests or observed content choices responsibly.

3. Phase plan

For every phase, confirm the objective, mode-specific message, channel, CTA, owner, asset and measure.

Phase	Objective and CTA	In-person / virtual message	Channel and asset	Owner and measure
8-12 weeks	Set the promise; open registration.	Venue value and travel plan / remote value, access, time zone, replay.	Event page, launch email, partner brief.	Campaign lead; page conversion and registrations by mode.
4-8 weeks	Build reach and proof; register.	Room experience and speakers / online format and participation.	Email, speaker kit, partner and organic social assets.	Channel owners; registrations and partner referrals.
2-4 weeks	Resolve objections; choose a ticket.	Capacity, venue logistics / access, device and replay terms.	FAQ email, speaker clips, earned coverage, approved paid media.	Campaign lead; click-to-registration and cost per registration.
Final week / day	Protect show rate; attend now.	Arrival and check-in / login, captions and support.	Mode-specific reminders, QA checklist, status messages.	Event ops; delivery rate and show rate by mode.
Post-event	Deliver value; watch, respond, continue.	Resources and highlights / replay, transcript and missed sessions.	Follow-up email, highlights, survey, sponsor report.	Lifecycle owner; replay, feedback and next action.

- ☐ 8-12 weeks: event page, tickets, tracking plan, approved core copy and launch assets are ready.
- ☐ 4-8 weeks: speaker and partner kits are distributed with dates, links and disclosure guidance.
- ☐ 2-4 weeks: objections, access details and campaign gaps are visible in the reporting review.
- ☐ Final week: mode-specific reminders, page and link QA, support routes and fallback messages are tested.
- ☐ Post-event: replay, resources, feedback, partner reporting and the next action have named owners.

4. Working fields

Launch date _____

Partner kit due _____

Paid review _____

Final QA _____

Replay due _____

Retrospective _____

5. Audience-message-channel matrix

Use the examples as prompts, then replace them with the real event promise and data sources.

Segment	Message to decide	Channel / asset	Measure
Attendance mode	What is distinct, shared, live, recorded and included in each ticket?	Event page, ticket copy, confirmation and reminder.	Registrations and show rate by mode.
Location / time zone	How practical is venue travel or remote timing?	Local outreach, geo-aware page copy, schedule email.	Conversion by geography and support questions.
Ticket type	What access, price, capacity and replay terms apply?	Checkout, deadline email and FAQ.	Ticket conversion, revenue and switches.
Lifecycle stage	What does a new prospect need versus a registrant or no-show?	Prospecting, nurture, reminder and replay sequences.	Click-to-registration, delivery and next action.
Source / partner	Why is this audience hearing about the event from this source?	UTMs, approved partner kit, referral or affiliate link.	Registrations and revenue by source.
Accessibility needs	What access details and accommodation route reduce uncertainty?	Accessible page/email, captions plan, contact route.	Requests resolved and accessibility feedback.
Content interest	Which sessions or outcomes are relevant without over-personalizing?	Topic email, speaker clip, agenda highlight.	Clicks, schedule selections and attendance.

6. Landing page and registration

- ☐ State the in-person and virtual value separately, including what is shared and what is not.
- ☐ Show dates, time zones, venue or remote access expectations, agenda, speakers and ticket terms.
- ☐ Explain replay terms, refunds or switching rules where relevant.
- ☐ Use only verified social proof and one clear registration CTA.
- ☐ Provide accessible content, readable contrast, useful alt text and an accommodation contact.
- ☐ Test every ticket path, confirmation, reminder, mobile layout and important link.

7. Speaker, partner and affiliate kit

- ☐ Approved short and long copy, image assets, event facts and audience-specific value.
- ☐ Unique trackable link; use affiliate or commission terms only when that relationship exists.
- ☐ Distribution dates, embargoes, approval route and contact person.
- ☐ Clear material-connection disclosure expectations for paid, gifted, affiliate or sponsored promotion.
- ☐ Review registrations and revenue by source without treating unpaid speaker support as a commission program.

8. Channel sequence

Choose the smallest channel mix that can reach the audience and produce a trustworthy learning signal.

- ☐ Owned event page and email: source of truth for the promise, tickets, access and changes.
- ☐ Speaker, affiliate and partner distribution: approved assets, links, dates and disclosures.
- ☐ Organic social and earned coverage: useful story angles, speaker proof and event highlights.
- ☐ Paid prospecting: reach new audiences with a clear offer and controlled budget.
- ☐ Paid re-engagement: use only after the applicable consent, privacy, audience-upload and platform-policy review.
- ☐ Reminders: send the right arrival or login instructions to each mode and protect the show rate.

9. Accessibility and inclusion

- ☐ Event page, registration, checkout and emails are navigable and use readable structure and contrast.
- ☐ Promotional videos include captions; live synchronized media has an appropriate caption plan.
- ☐ Images have useful alt text and essential visual information is also available in text.
- ☐ Venue accessibility, remote access, time zones, language and ticket limitations are clear.
- ☐ Slides, downloads and replay materials have accessible versions or an agreed remediation plan.
- ☐ Accommodation requests have a visible contact path, owner, response target and private handling process.

10. Consent, privacy and disclosure

- ☐ Document which pixels, tags, audience uploads, advertising platforms and third parties are used.
- ☐ Obtain and record the consent required for applicable tracking, profiling and online advertising.
- ☐ Explain material connections clearly for paid, gifted, sponsored or affiliate promotion.
- ☐ Collect only campaign data the team can use responsibly; protect exports and limit access.
- ☐ Confirm jurisdiction-specific requirements with the responsible legal or privacy owner.

11. Final-week and day-of QA

- ☐ All important links, UTMs, referral links, pixels and ticket paths work in a realistic test.
- ☐ Desktop and mobile pages show the right date, time zone, venue, access and support details.
- ☐ In-person reminders cover travel, doors, check-in, schedule changes and venue contact.
- ☐ Virtual reminders cover login, session access, time zone, captions, device guidance and online support.
- ☐ Hosts, support and channel owners have approved fallback and delay messages.
- ☐ Campaign assets no longer promise unverified features, outcomes, discounts, scarcity or social proof.
- ☐ The event-management, advertising, email and delivery tools are described according to the job each one performs.

12. Measurement plan

Review at a set cadence before the event and once more after the post-event window closes.

Measure	Source	Decision it informs
Landing-page conversion	Event page / analytics	Message or registration friction.
Registration source and UTMs	Event platform / analytics	Channel and partner contribution.
Email click-to-registration	Email tool plus registrations	Sequence and audience relevance.
Registrations and show rate by mode	Event platform, check-in and delivery tools	Audience promise and reminders.
Paid cost per registration	Ad platform plus registrations	Budget and targeting decision.
Partner / affiliate registrations	Referral or affiliate tracking	Partner support and terms.
Session and replay activity	Delivery and event platforms	Content and follow-up priorities.
Feedback and next action	Survey, CRM or lifecycle tool	What to change and who to nurture.

13. Post-event campaign

- ☐ Send the replay or access promised to each ticket type, with captions or transcripts where planned.
- ☐ Tailor follow-up for in-person attendees, virtual attendees, no-shows and replay viewers.
- ☐ Share useful highlights and resources without exposing attendee data or unapproved footage.
- ☐ Deliver sponsor and partner reporting from named data sources with any gaps explained.
- ☐ Collect feedback on content, access, support and the attendance-mode experience.
- ☐ Record what the next campaign should keep, stop, change and test.

14. Retrospective

Best source	
Best message	
Biggest friction	
Access issue	
Data gap	
Next experiment	

System boundaries

Use HeySummit for the event-management workflow around pages, registration, tickets and access, speakers and affiliates, event emails, connected delivery, replays and event reporting. Keep advertising metrics in the ad platforms, email performance in the relevant email tool, and provider-specific interaction in the selected delivery tool.

This checklist is practical planning guidance, not legal advice. Confirm the privacy, advertising, accessibility, disclosure and venue requirements that apply to your event, audience and jurisdiction.

Build the campaign around a clear attendee promise, named owners and evidence you can actually review.

Explore HeySummit's hybrid event workflow at heysummit.com/solutions/hybrid-events.