RingCentral

Partner Events Go-to-Market Playbook

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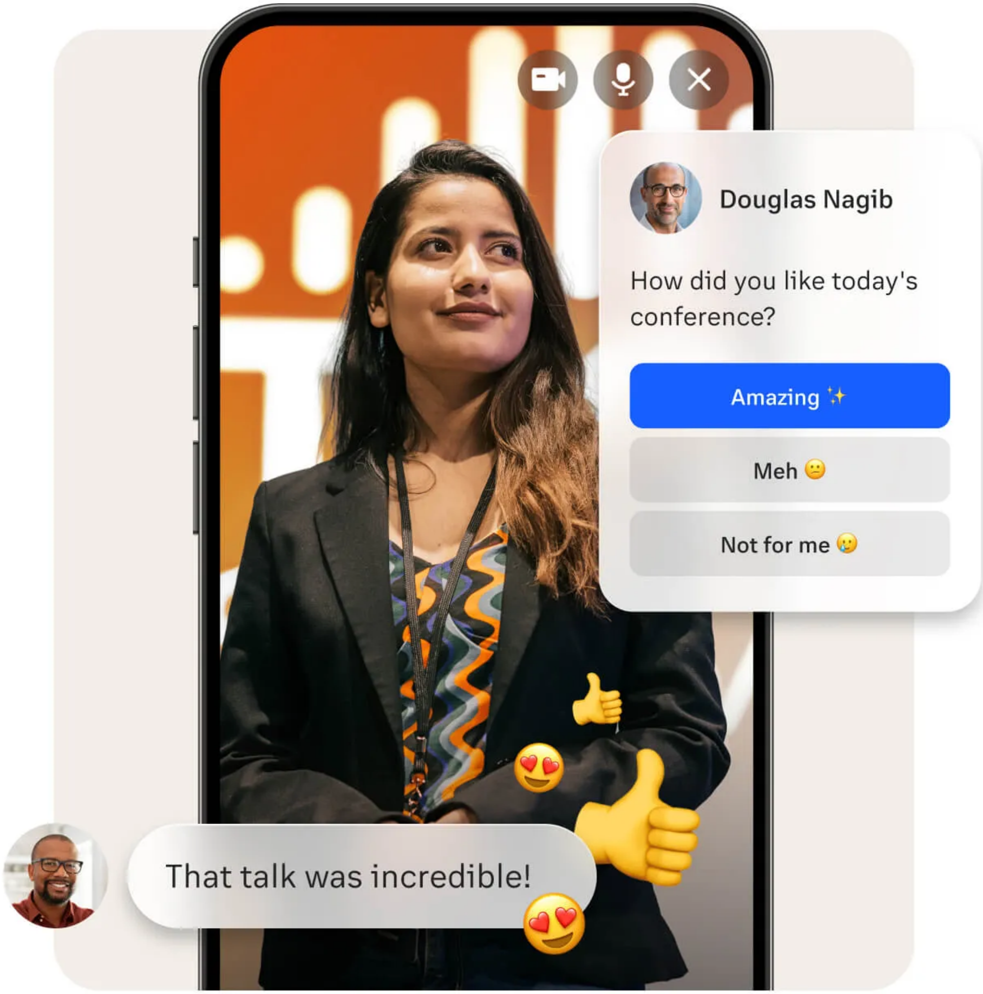
Introduction



The purpose of this playbook

In-person events run in the DNA of RingCentral's Partner Program. There's no substitute for building genuine connections with channel partners — especially true in the post-coronavirus era. We accomplish this by hosting partners at impressive locations around the globe, where we gather for impactful and strategic discussions.

How do we successfully promote our events? Planning a great event is one thing, but what does that matter if no one shows up?

In collaboration with our Field Marketing counterparts, we could easily write an entire tome on what it takes to successfully execute an engaging in-person event. But driving registration and attendance remains a cornerstone of the Partner Content and Communications Team.

In this playbook, we walk through an ideal scenario for our major event setup and promotion. And, while the needs for each individual event will vary, this guide can be considered comprehensive in the sense that if the need arose, we could and would do every step here. No two successful events are exactly alike, and therefore neither will be our process.

Event Setup and Promotion Flow

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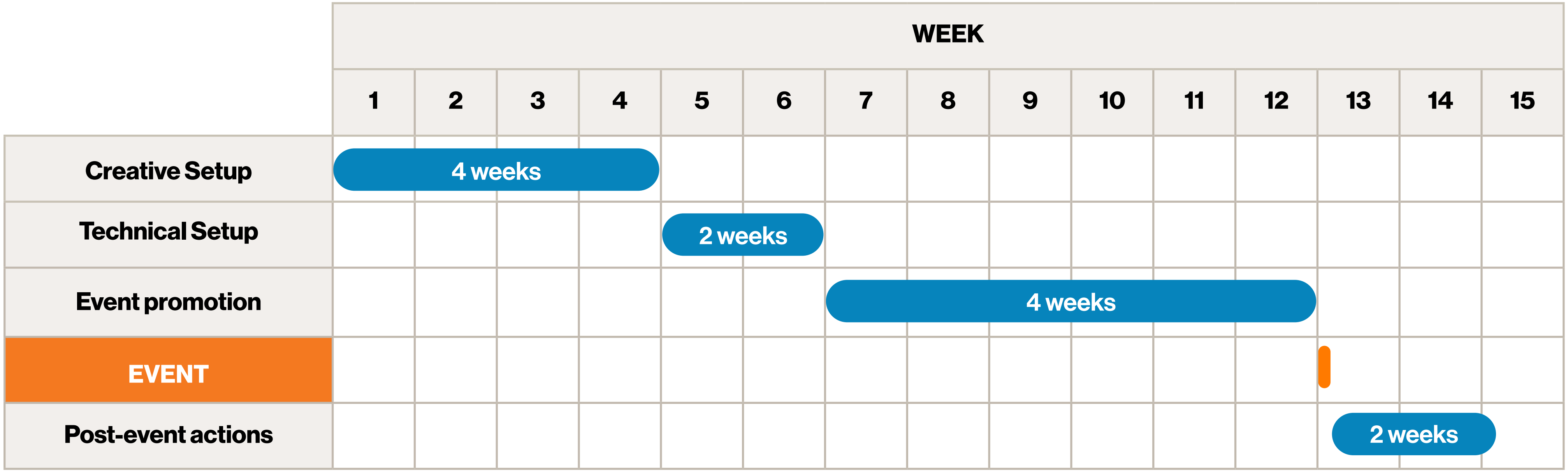
Receive event information from stakeholders



Deliver results and recommendations to stakeholders

Part I: Setup

1. Receive information from stakeholders (~8-10 weeks prior to event)

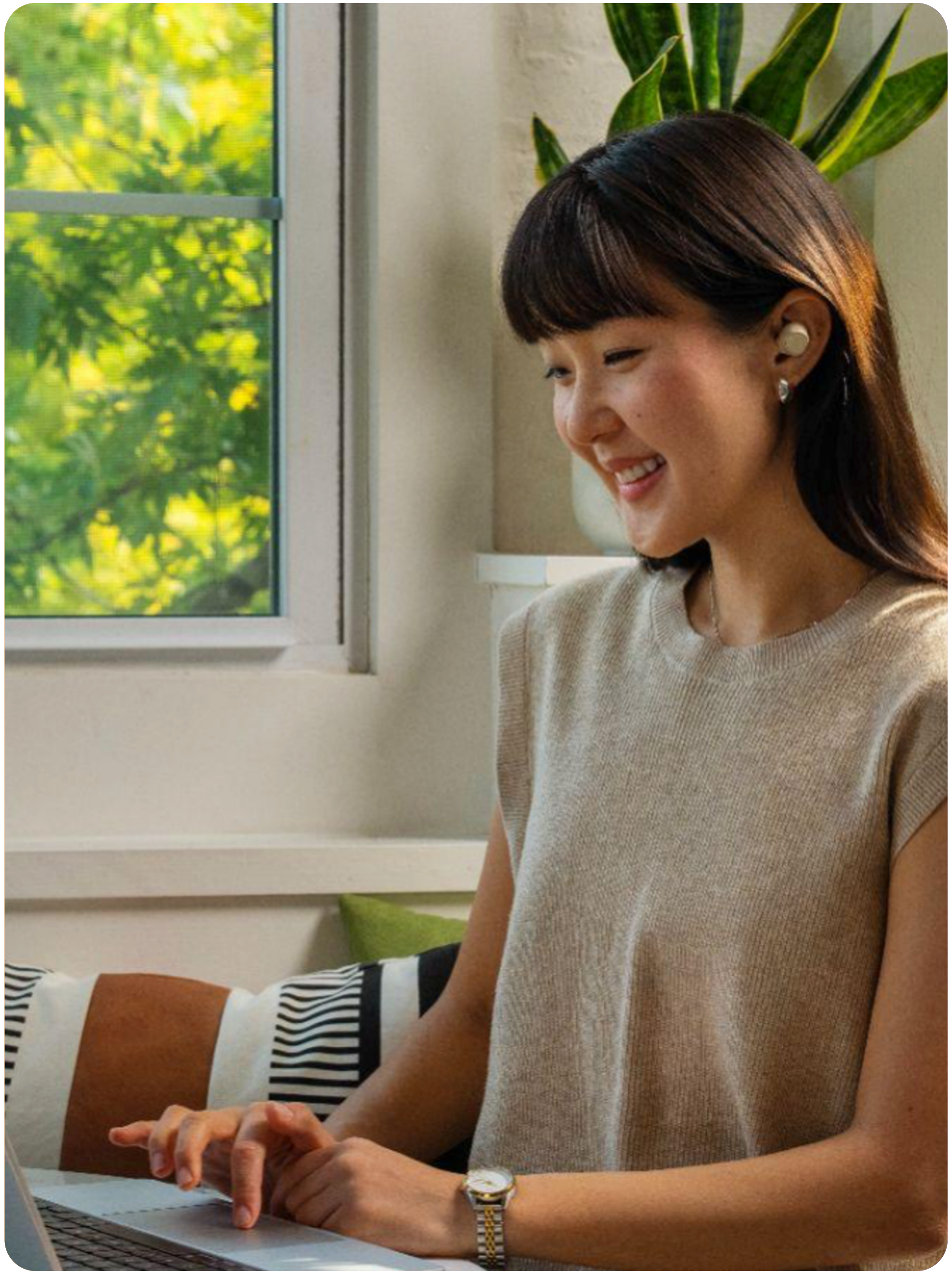
a. We rely on a tight interplay between our team and the myriad of stakeholders who run partner events. And, while some event details will likely not be available at this stage, in order to begin creative and technical setup, we need mission-critical information like:

1. Event Title
2. Date
3. Time
4. Location
5. Speakers
6. Agenda

2. Creative setup (~8-9 weeks prior to event)

a. Content: At the heart of every event is the way we talk about the event. Therefore, the moment we've received all the mission-critical event information from primary stakeholders, we develop content that can be used interchangeably across different promotional channels, such as:

1. Landing page copy
2. Promotional email copy
3. Social media posts
4. Email copy from Partner Managers directly to partners
5. Phone talking points for Partner Managers to utilize



b. Creative Bill of Assets: Second only to how we talk about an event is how we develop the creative identity within our assets. Our Creative Bill of Assets is split into three major sections: Promotional materials, day-of-event materials, and swag items. These three sections are detailed below:

1. Promotional materials:
   These are specifically used to promote the event itself. Examples include:
   - Landing page and email creative assets
   - PDF invitation
   - Partner Portal promotional banner
   - Email signature buttons
   - Postcard
   - Social cards

2. Day-of-event materials:
   There should never be a disconnect between the look of an event we are promoting and how it feels when someone gets there. Having a consistent creative theme that follows an attendee from the time they learn about the event to when they leave the building creates a memorable experience. We continue our event theme into physical spaces in the following ways:
   - Welcome cards
   - Pull up banners
   - Event posters
   - Table tent cards
   - Large format banners (such as a step wall repeat banner)
   - Name tags
   - Event brochures and/or booklets
   - Videos or presentations to play on digital displays
   - Window clings
   - Event presentation templates

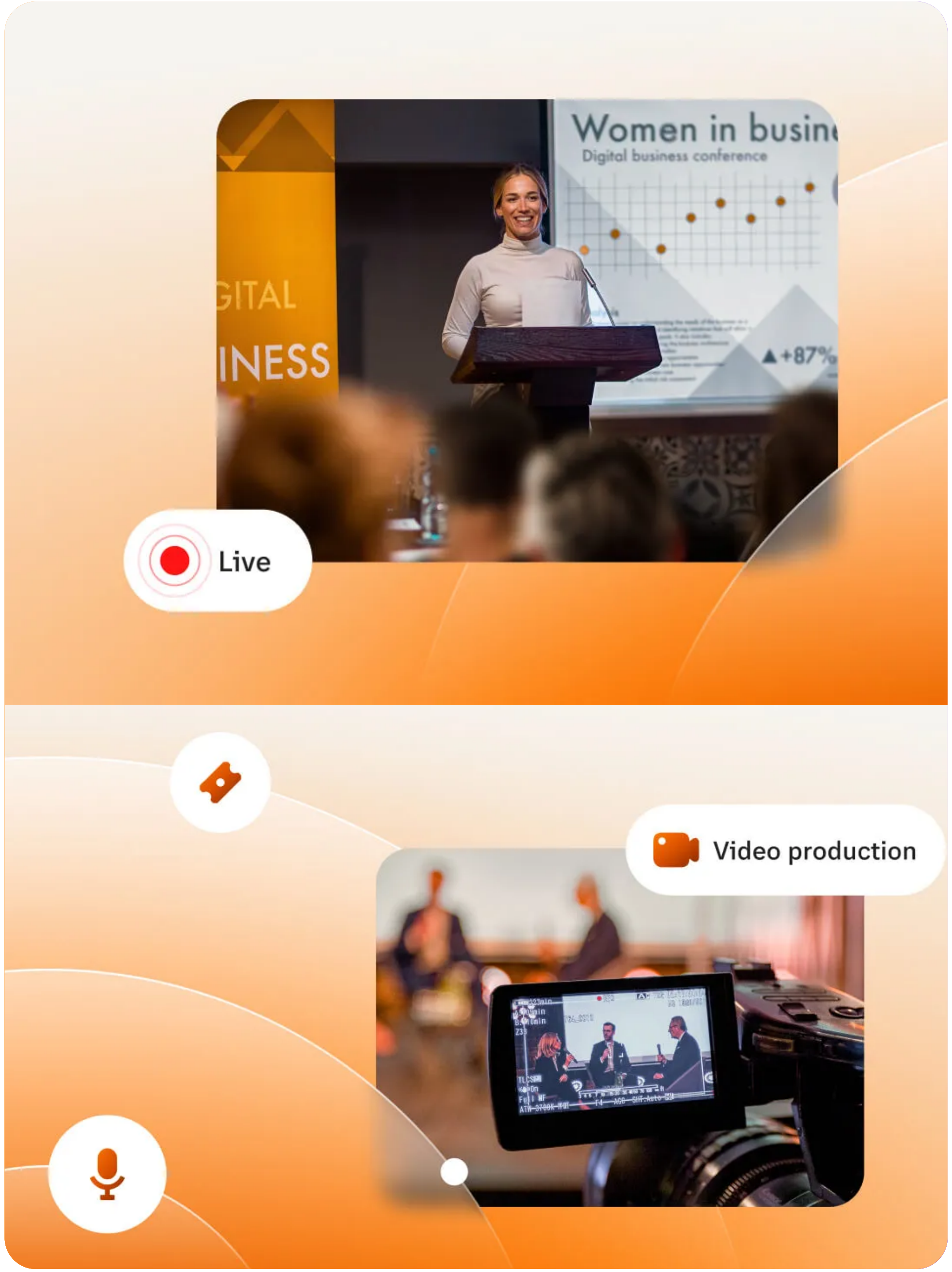
3. Swag designs:
   Events will usually have giveaways for attendees to take with them. Depending on the scale, these may be specifically designed with the major event theme in mind, or simply RingCentral-branded. While the types of swag we can design are nearly limitless, some typical examples include:
   - Pens
   - Journals
   - Socks
   - T-shirts
   - Branded bags

3. Technical setup (~8 weeks prior to event):

Once we know what we want to say, and what we want it to look like, the next step is to successfully and intelligently drive registration to the event. The following steps outline technical considerations, with brief descriptions of each step for capturing registrations in Marketo.

a. Landing page setup: At the core, the landing page needs to succinctly describe the who, what, where, when, and why of the event. As this will be the endpoint for all of our promotional materials, the landing page is the paramount digital asset that we produce for any event.

b. Audience identification: We know what we want to say, we know what it should look like, but who are we talking to? We will almost never host an in-person event without some sort of regional consideration. For this, we work with event stakeholders to identify which markets we should be targeting.



c. Registration flow: In order to make sure registrants are entered into our send lists and receive subsequent communications reminding them of the event, we next need to activate the registration flow. The general process for this is:

1. Develop the confirmation email, including an event-specific calendar file.

2. Clear lists:
   If the program for this event is copied from another similar event, Marketo will also copy over the list from the previous event. Prior to accepting new registrations, it is important to clear all collected lists to maintain an accurate record of registrations.

2. Activate the "Registered" flow:
   This enables registrations to be recorded from Marketo, and allows registrants to be entered into automated reminder campaigns.

d. UTM parameters: Part of event promotion is also knowing what channels registrations came from. Urchin tracking module (UTM) parameters allow us to create custom links, so we can see what specific asset a registrant used to access the landing page.

1. Form setup:
   Ensure that all forms are utilizing UTM parameter intake via hidden fields.

2. Link setup:
   Every link used to promote this event must have a UTM parameter identified. Any registrations that come back without a UTM parameter appended will return "No source given."

e. Email cadences (invites, reminders): Depending on the lead time prior to an event, and its importance, we will build a series of invitation and reminder emails to both promote the event and ensure registrants attend.

1. Invite emails:
   Developed to promote the event to gather more registrations. Once someone has registered for the event, they are then excluded from subsequent invite emails.

   KPI:
   Total number of registrations generated by email

2. Reminder emails:
   Developed to promote the event to people already registered. The goal of these emails is to increase the number of registrants who ultimately attend the event.

   KPI:
   Ratio of attendees to total registrations.
   A highly successful event will have a registered to attendance ratio of over 60%.

Part II: Promotion

1. Channels of Promotion (Beginning ~8 weeks prior to and going through to the day of the event)

Once we have launched the event to the local team supporting it, we begin promotion to our target audience. We have a number of different channels at our disposal, and each event will use some or all of these to drive higher registration.

a. Email: Depending on the number of value propositions we can highlight in an invitation campaign, we will create a cadence of emails directly promoting our event. Far and away, this is our most important channel of promotion.

b. Partner Manager communications: Partner Managers at RingCentral continue to be the point of the spear for personalized partner communications, and therefore are a powerful resource for driving registration. To support these efforts, we give Partner Managers access to a number of different resources, including:

1. Templated email copy
2. Brief talking points for review with a partner during a meeting or over the phone
3. PDF creative that can be attached to email communications
4. Email signature blocks that link directly to the event landing page

c. Portal Promotion: Depending on the region and scope of the event, we can utilize the partner portal to drive registration as well.

d. Social media strategy: Social media not only provides a useful channel for driving registration, but also building the brand of any given event and mindshare across the partner community.

1. Executive social media:
   We utilize channel executive social media presence and connections to promote the event, especially if that individual will attend.

2. RingSocial:
   We use RingSocial to allow all team members to quickly deploy promotional social media.

e. Print strategy: Print media can also play an important role in building registrations and mindshare for any keynote event, as it becomes yet another avenue for partners to see and interact with the landing page. Some examples of print media at our disposal include:

1. Postcards sent directly to partner offices
2. Print flyers for Partner Managers to deliver to partner offices
3. Print ads in channel-specific publications

f. Newsletters: As one of our most consistent channels for communication, the newsletter is a great place to not only build registration, but also mindshare.

Part III: Post-event actions

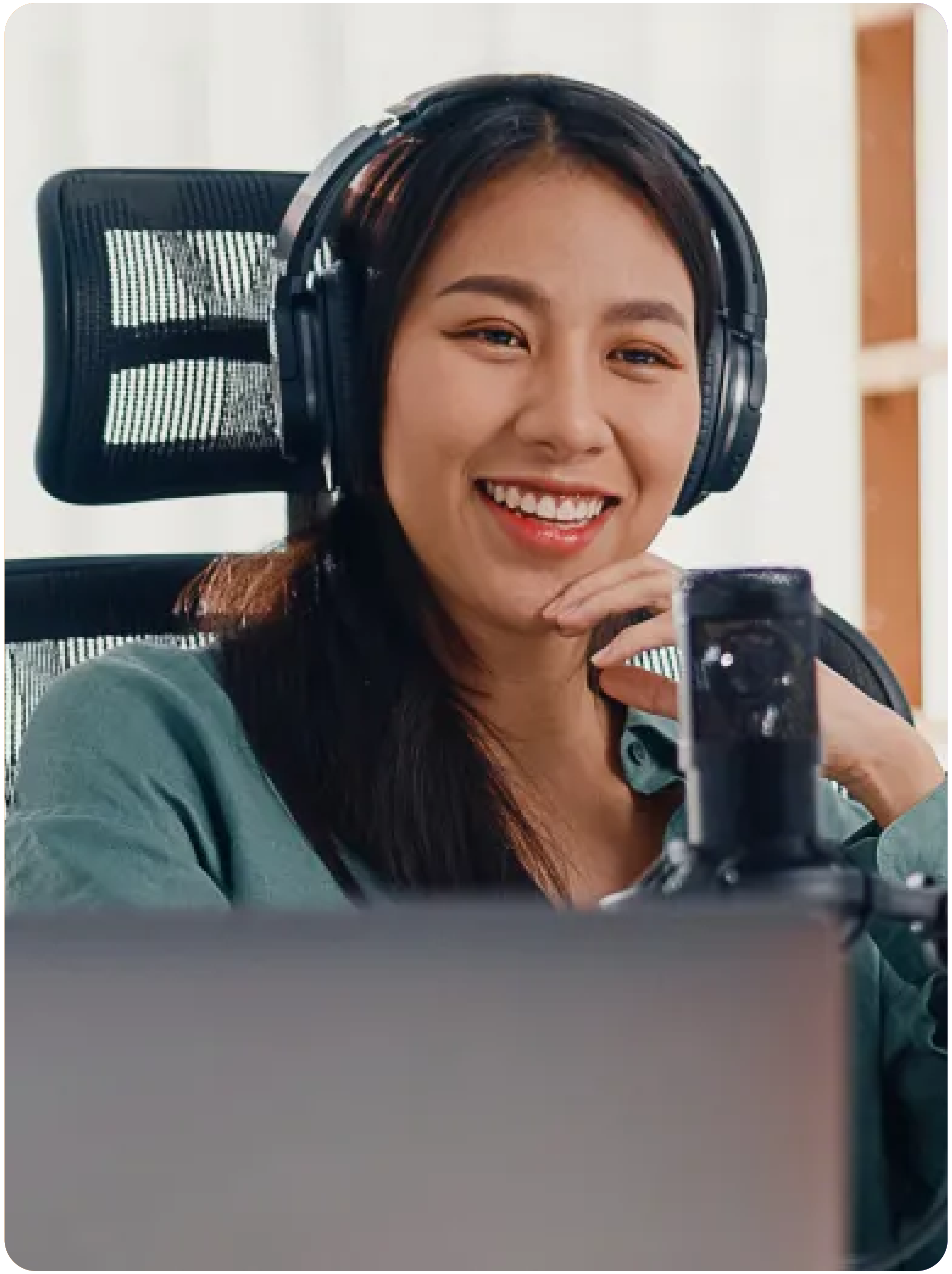
(1-3 weeks post-event)

The work is not done when an event concludes. Once we understand the efficacy of our efforts in Part I and Part II of this document, we are able to create meaningful last impressions to any partners who either attended, or simply registered and did not make it.

1. Post-event communications (~1 week post event):

a. Attendees email: We thank a partner for attending, provide them with resources from the event, and request them to fill out a survey about their experience.

b. Registrants email: For any partner who registered but did not ultimately attend, we also thank them for registering, but we also provide them with a survey that asks why they were unable to attend.



2. Post-event efficacy analysis (2-3 weeks post-event):

Once the definitive list of attendees is finalized, we begin analyzing our successes and opportunities from the promotion campaign.

a. Registration UTM source drilldown: This is where meticulously tracking UTM parameters in our technical setup comes in handy. After the event, we not only analyze what channels of promotion were the most successful at driving registration, but also which drove the best attendance rates.

b. Partner type drilldown: Are there any trends on which partners attended versus those that didn't? Some trends we look for in this type of analysis include:

1. Attendance by partner manager type
2. Attendance by geographical region, state, or city
3. Attendance by partner type (Strategic, TSD, or subagent, for instance)

c. Survey drilldown: On top of the objective analysis of a partner's attendance based on their registration source and partner type, we also rely heavily on surveys to get a subjective understanding of a partner's experience. This not only helps us plan more successful events in the future, but also allows us to refine the process outlined in this document. If we are seeing, for instance, feedback that describes a practice we're doing in a negative light, this feedback is taken into consideration for the creation of future events.