



# Marketing Operations Guide for Offline Event Management in HubSpot

This guide serves as your comprehensive blueprint for mastering the integration, management, and use of offline event data within HubSpot. It's a step-by-step guide to a workaround that helps marketing teams overcome the limitations of HubSpot's Marketing Events object and to manage their online and offline events with ease.

## **But first...why do we need a workaround in the first place?**

The key limitation with HubSpot's Marketing Event Object is that it restricts manual additions or updates to attendee information directly within HubSpot.

Users cannot add individuals to an event, mark them as having attended, or update attendee details directly without conducting a bulk upload. It's a limitation that can hinder the efficient management of event data, especially for offline events where manual data entry might be more common.

*But fear not! Below is a step-by-step workaround that involves the preparation and execution of bulk uploads. It is a workaround that allows users to manage event data more efficiently by setting registration and attendance dates en masse.*

# Step 1: Setting Up Your Event Registration Process

*Create a registration form or use alternative methods like scanning business cards or adding new contacts manually. Ensure each registrant is marked with a custom field indicating their event registration.*

Your form should include all necessary properties you wish to capture about your attendees, such as name, contact information, and any specific preferences.

Not planning on using a HubSpot registration form? Consider these alternatives:

- **Scanning Business Cards**

At the event, you might opt to scan attendees' business cards. Add a custom field to each contact record indicating their event registration, facilitating workflow triggers for subsequent steps.

- **Adding New Contacts Manually**

While engaging with attendees, manually add their details to HubSpot. Mark each with a custom field to denote their registration date.

Both alternatives require setting up workflows to utilize the registration data effectively, such as for sending follow-ups or tracking engagement, which will be crucial for the steps that follow.

The screenshot shows a HubSpot registration form titled "Mandy Snowboarding Event Registration Form". The form is displayed in a preview mode with a dark header bar. The main content area is divided into two columns. The left column, titled "Existing properties", contains a search bar and a list of frequently used properties: First name, Last name, Email, Phone number, Street address, City, State/Region, Country/Region, Mobile phone number, and Company name. The right column, titled "Form", contains a list of form fields: Company Name (company), Email (email), First Name (firstname), Last Name (lastname), and Job Title (jobtitle). Each field has a "Contact Property" label next to it. A "Submit" button is located at the bottom of the form. The top right corner of the form shows "Auto-saved with unpublished changes" and an "Update" button. The bottom right corner shows "Queued progressive fields (0)".

# Step 2: Creating an Attendee List

*Summary: Compile a list of all individuals who have registered for the event through various methods.*

After establishing your registration process, you'll want to compile a list within HubSpot. This list will include:

- Individuals who have completed the registration form, capturing their intent and details.
- Attendees who have registered for the event through alternative methods, ensuring no participant is overlooked.

Creating this list is fundamental for organizing your event's attendees and enabling targeted communication, such as updates, reminders, and post-event follow-ups. It serves as a central database for managing your event's engagement and tracking the effectiveness of your marketing efforts.

The screenshot displays the HubSpot CRM interface for a list titled "Mandy's Snowboarding Event Registrants". The list contains 24 contacts. The left sidebar shows two filter groups: "Group 1" (Has completed: Registered for marketing event) and "Group 2" (Form submission). The main table lists the following contacts:

NAME	ADDED TO LIST DATE	PRIMARY COMPANY	LAST ACTIVITY DATE (GMT+8)	LEAD STATUS
Marie Christine Doble	Mar 5, 2024 12:59 PM		--	--
Aurora Jo Uyuanco	Mar 5, 2024 12:59 PM		--	--
Sarah Morton	Mar 5, 2024 12:59 PM		--	--
Meghan Young	Mar 5, 2024 12:59 PM		--	--
Liezl Prestin	Mar 5, 2024 12:59 PM		--	--
Vonnave Sanchez-Butanas	Mar 5, 2024 12:59 PM		--	--
Marnille Sacmar	Mar 5, 2024 12:59 PM		--	--
Fermin Jr. Bao	Mar 5, 2024 12:59 PM		--	--
Eisen Job Alquiza	Mar 5, 2024 12:59 PM		--	--
Learnmore Tshabangu	Mar 5, 2024 12:59 PM		--	--
Christian Gubaton	Mar 5, 2024 12:59 PM		--	--
Michael Denega	Mar 5, 2024 12:59 PM		--	--
Stjepan Grcic	Mar 5, 2024 12:59 PM		--	--
Maarten Bovenderde	Mar 5, 2024 12:59 PM		--	--
Cornelis Smit	Mar 5, 2024 12:59 PM		--	--
Analiza Torrevillas	Mar 5, 2024 12:59 PM		--	--
Emily Mpunga	Mar 5, 2024 12:41 AM		--	--
Kristina Mariz Pabillar	Mar 5, 2024 12:59 PM		Jul 6, 2023	--

# Step 3: Automating Registration Date Assignment

*Summary: Use HubSpot workflows to assign a registration date automatically to each attendee based on their registration method.*

In this step, you'll use workflows to automate a critical aspect of your event management: assigning a registration date.

This process is designed to streamline how you track and manage attendee registration timelines, ensuring that every participant's registration is accurately logged and easily accessible.

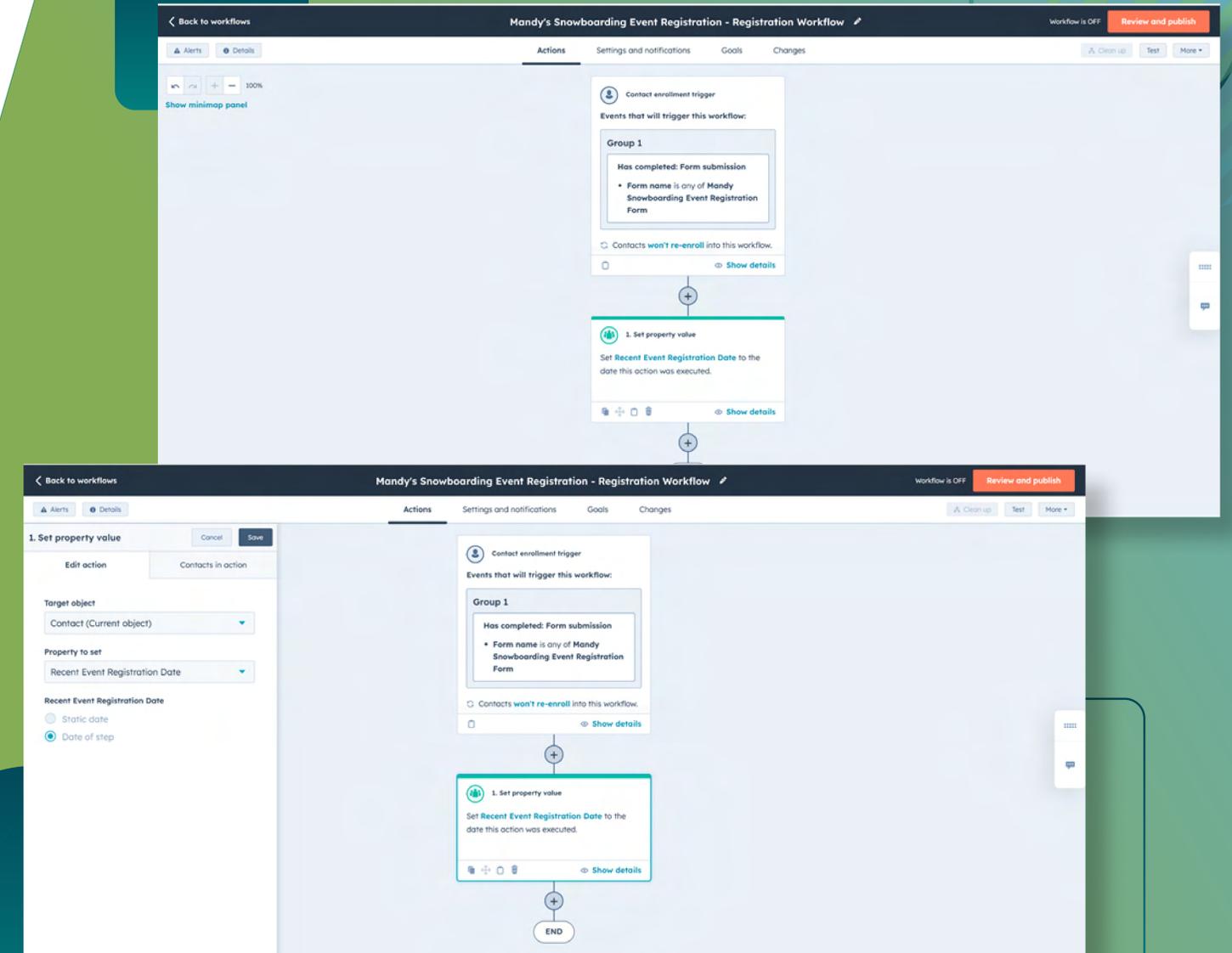
## Workflow Trigger and Enrollment

The automation process begins with the submission of the event registration form, which serves as the primary trigger for the workflow.

For attendees added through alternative means, such as a business card scanner or manual entry at the event, a specific property should be marked on their contact record to enroll them in this workflow.

This step ensures that all event registrants, regardless of their method of registration, are included in the workflow. The workflow then assigns the recent event registration date as the date when this step occurred, accurately capturing and documenting the timeline of each attendee's registration.

This automation not only streamlines the management process but also provides a clear, chronological view of registrations, enhancing your ability to manage and engage with event participants effectively.



## Exporting and Utilizing Registration Data

**Summary:** Export the list of registrants with their registration dates and other relevant details. This exported list will be used for further processing.

Once the workflow assigns a registration date to each attendee, you'll now work on using this data for broader event management purposes.

You can access the previously created list of registrants and export it, selecting only the essential information required for your event management tasks. In particular, this includes the recent event registration date for each attendee.

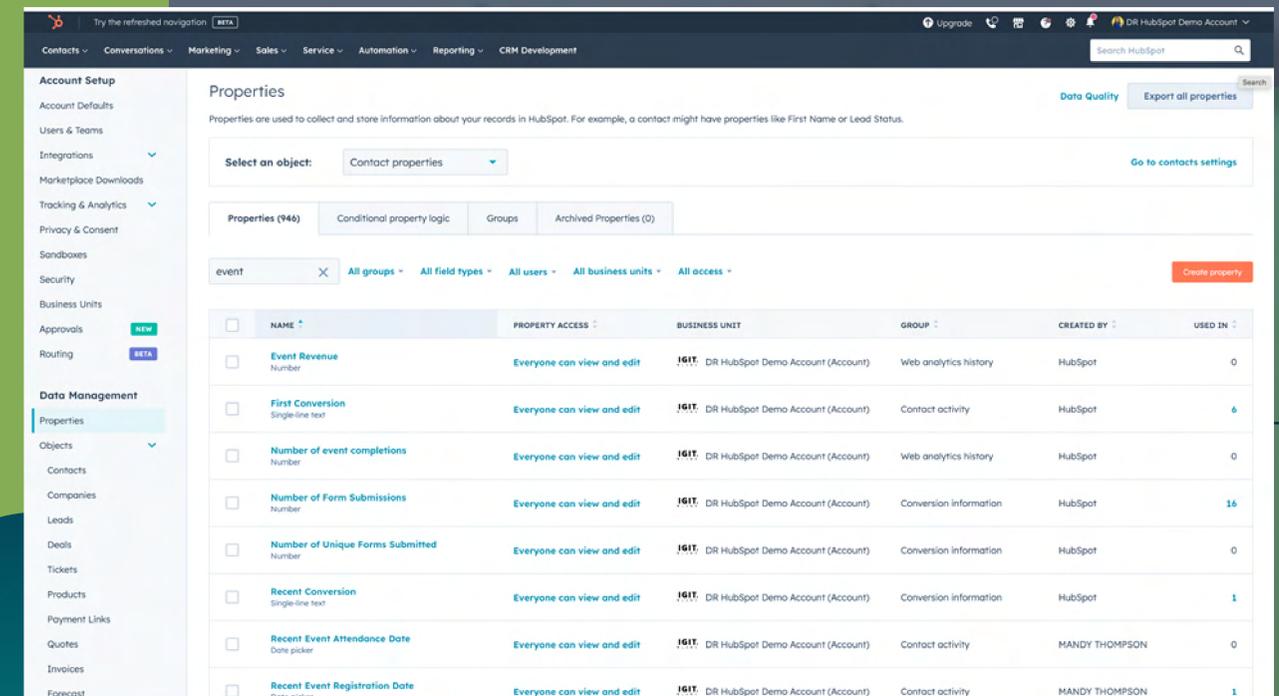
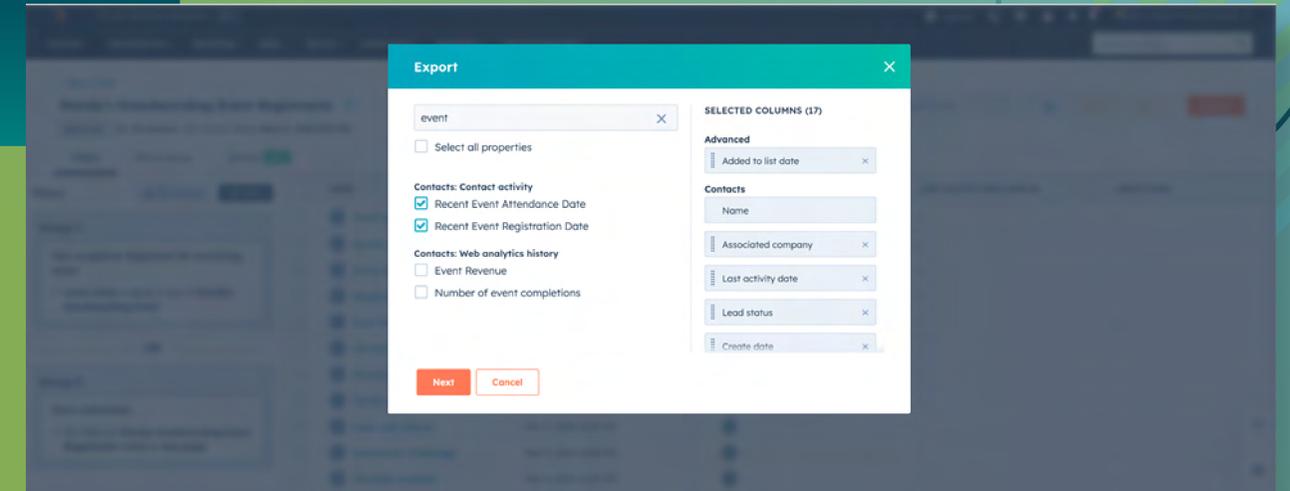
By exporting this tailored list, you enable the possibility of importing it into the event upload list. This process is critical for organizing your event's backend logistics, allowing for refined attendee segmentation, personalized communication, and enhanced overall event coordination.

## Enhancing Workflow with Custom Properties

For the workflow to function as intended, custom properties related to event registration must be created within HubSpot. These properties are crucial for segmenting and managing attendees effectively.

After establishing these custom properties, you can then leverage them in both the export of your registrant list and within the workflow to assign specific attendee data points, such as the registration date.

This process demonstrates the necessity of custom properties in tailoring your event management workflow. When you create these properties, you enable a seamless transition of data from registration forms to actionable insights within your event's operational framework, paving the way for more organized and efficient workflows.



# Step 4: Importing Registrant Information into HubSpot

*Summary: Import the exported list back into HubSpot as marketing event activities, ensuring that each attendee's interaction with the event is accurately reflected.*

After exporting the list with custom registration dates and other relevant attendee details, the next step involves importing this information back into HubSpot as marketing event activities. This process is vital for accurately reflecting each attendee's interaction with your event, from registration to attendance.

## 1. Selecting the Import File

Navigate to the marketing event details within HubSpot and choose the option to import registrants. Select the spreadsheet that contains your exported list of attendees.

## 2. Mapping Data Fields

During the import process, ensure that the registration date is imported as a "Marketing Event Activity" and mapped correctly to the "Registered At" property. If you have data fields that don't directly correspond to HubSpot's default fields or are not relevant for this specific import, choose the option to not import those columns.

The image displays two screenshots of the HubSpot import interface. The top screenshot, labeled 'Step 1 of 4', shows a progress bar with steps: TYPE, UPLOAD, MAP, and DETAILS. The main heading is 'Select the activities you'd like to import'. Below this are three cards: 'Registered' (checked), 'Attended', and 'Cancelled'. Each card has a description: 'Contacts that have registered for the Marketing Event', 'Contacts that have attended the Marketing Event', and 'Contacts that have cancelled registration for the Marketing Event'. A link 'View import guide' is visible. The bottom screenshot, labeled 'Step 2 of 4', shows the 'Upload your files' step. It includes a warning: 'Before you upload your files below, make sure your file is ready to be imported'. Below this is a 'Select a file' section with a file upload area. Further down are dropdown menus for 'Choose how to import Contacts' (set to 'Create and update Contacts') and 'Choose how to import Marketing event activities' (set to 'Create new Marketing event activities only'). At the bottom, there is a 'Select the language of the column headers in your file' dropdown set to 'English'.

The screenshot shows a HubSpot contact import interface. The browser address bar displays "/details/308521875636/import". The page contains a table of contact information with columns for field name, value, status, and property selection. A dropdown menu is open over the 'Cancelled Date' row, showing options for 'Property' (Contact properties, Marketing event activity properties) and 'Record ID' (Record ID - Contacts, Choose now to import).

Field	Value	Status	Property	Don't overwrite
Last Name	Mpunga Romanillos Pedrosa	✓	Contact properties	<input type="checkbox"/>
Email	maliakotope@gm... jakedoe@gmail.com jessiemarpedrosa...	✓	Contact properties	<input type="checkbox"/>
Phone Number	-- 9322501133	✓	Contact properties	<input type="checkbox"/>
Job Title	-- Dev --	✓	Contact properties	<input type="checkbox"/>
Buying Role	-- Other --	✓	Contact properties	<input type="checkbox"/>
Registration Date	03/01/2014 02/28/2024 02/27/2024		Choose how to import	<input type="checkbox"/>
Cancelled Date	-- -- --		Choose or create a property	<input type="checkbox"/>
Attended	3/2/2024 3/2/2024 3/2/2024		Choose or create a property	<input type="checkbox"/>
Create Date	2023-10-12 18:34 2023-04-26 23:40 2023-02-15 3:41		Choose now to import	<input type="checkbox"/>
Additional Comment	--	✓	Contact properties	<input type="checkbox"/>

### 3. Handling Attendee Attendance

For tracking event attendance, a separate list of attendees who physically attended the event can be prepared. This can be updated manually post-event or automatically via QR code scans during the event. Ensure these attendees are marked accordingly in HubSpot to reflect their attendance status accurately.

This step is crucial for maintaining an organized and comprehensive record of event interactions within HubSpot, allowing for precise segmentation and targeted follow-up actions.

# Step 5: Segmenting and Updating Attendee Lists

*Summary: Segment attendees based on specific criteria and update their records in bulk. Re-export and re-import the updated list to finalize attendance tracking.*

This is where you'll segment your attendees for targeted engagement.

This step enhances the precision of your follow-up strategies and engagement analysis.

## 1. Filtering Attendee Lists

Access the list or view within HubSpot that contains your event attendees. Use the available filters to refine this list based on specific criteria, such as attendance date.

## 2. Bulk Editing Attendee Information

Select all relevant contacts and utilize the bulk edit feature to update their records simultaneously. For instance, you can set the "Recent Event Attendance Date" for all attendees who were present.

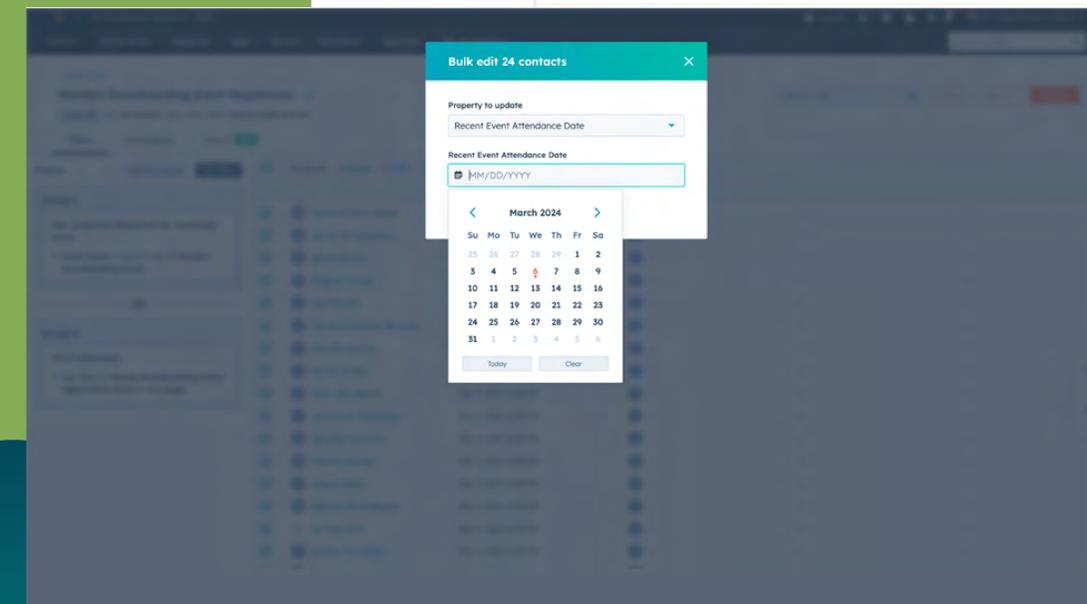
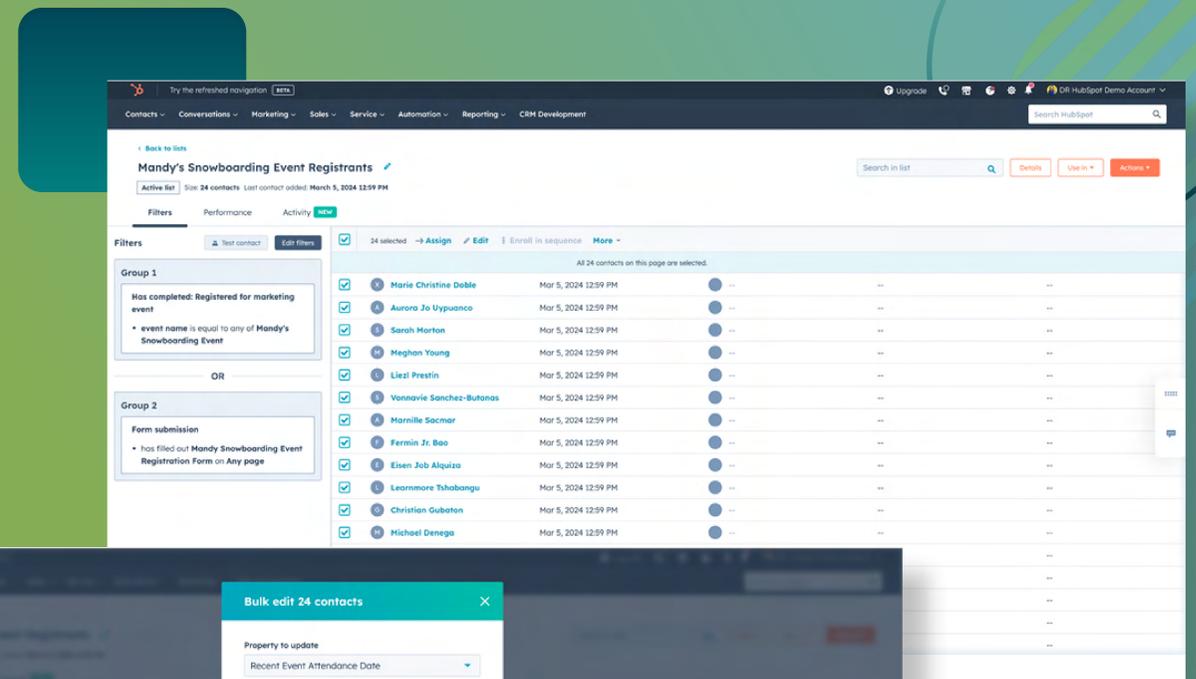
## 3. Re-exporting and Re-importing for Updates

Export this newly updated list, ensuring it includes the "Recent Event Attendance Date" column. Re-import this list into HubSpot to finalize the attendance tracking.

## 4. Marking Attendance and Updating Dates

Use a prepared spreadsheet that includes registration date, attended date, and cancellation date for a comprehensive event overview. Importing this spreadsheet allows you to systematically update attendee statuses and dates in HubSpot.

This step enables effective segmentation for follow-up actions and provides a clear overview of attendee engagement.



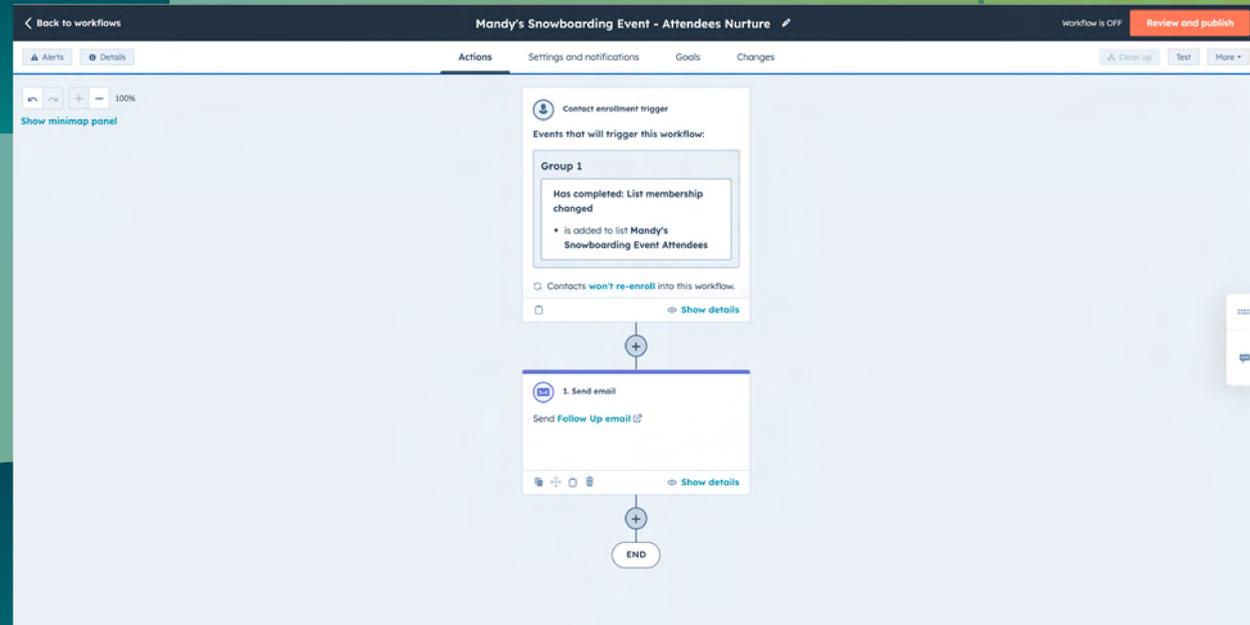
# Step 6: Enrolling Attendees in Follow-Up Workflows

*Summary: Enroll attendees in specifically designed workflows based on their attendance status for personalized follow-up emails.*

The final step focuses on nurturing your relationship with attendees through follow-up workflows, ensuring that every attendee receives timely and relevant content, fostering a lasting connection and enhancing overall event ROI.

Enroll attendees into specifically designed workflows based on their attendance status to engage them with personalized follow-up emails.

This strategy not only keeps the conversation going but also paves the way for future interactions and engagements



## Summarizing Your Workaround to Maximize HubSpot's Event Marketing & Management

Digesting the vast amount of information on managing offline events can be overwhelming. But it's a manageable task when broken down step-by-step. Here's the recap:

**Set Up Event Registration Process:** Create a registration form or use alternative methods like scanning business cards or adding new contacts manually. Ensure each registrant is marked with a custom field indicating their event registration.

**Create an Attendee List:** Compile a list of all individuals who have registered for the event through various methods.

**Automate Registration Date Assignment:** Use HubSpot workflows to assign a registration date automatically to each attendee based on their registration method.

**Export and Utilize Registration Data:** Export the list of registrants with their registration dates and other relevant details. This exported list will be used for further processing.

**Import Registrant Information into HubSpot:** Import the exported list back into HubSpot as marketing event activities, ensuring that each attendee's interaction with the event is accurately reflected.

**Segment and Update Attendee Lists:** Segment attendees based on specific criteria and update their records in bulk. Re-export and re-import the updated list to finalize attendance tracking.

**Enroll Attendees in Follow-Up Workflows:** Enroll attendees in specifically designed workflows based on their attendance status for personalized follow-up emails.



With this workaround for HubSpot's Marketing Events object, you can ensure you maximize the potential of your offline events, streamline your attendee data handling, and glean actionable insights to enhance your event management strategy.

Questions? Drop us a line - we're always here to talk shop and help you make the most out of HubSpot!

LET'S TALK!

[hello@digitalreachos.com](mailto:hello@digitalreachos.com)



**DIGITAL REACH**  
ONLINE SOLUTIONS