

STARTUP MARKETING WITH VIRTUAL SUMMITS

How to Generate Leads, Boost Brand Awareness, And Build High-Value Partnerships

Close.io

STELI EFTI AND RYAN ROBINSON

9 steps to create a virtual summit: 7,827 subscribers and 55 interviews

By Ryan Robinson



In hindsight, it sounds a little crazy deciding to **create a virtual summit** from scratch in less than just two months.

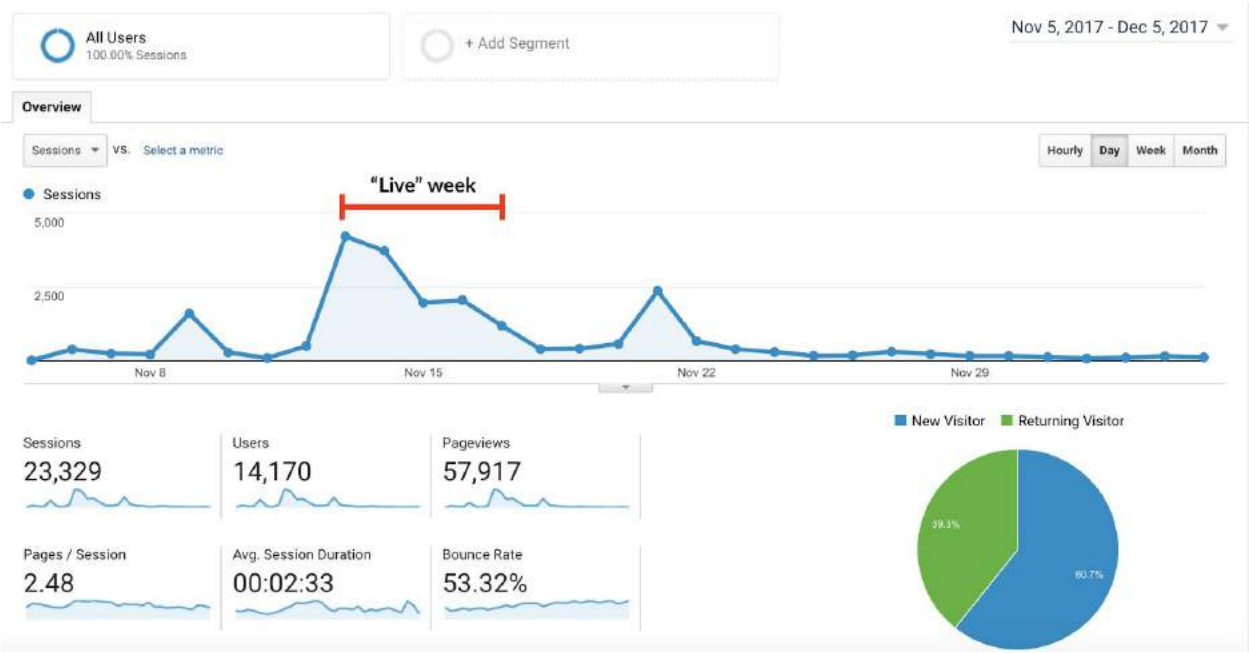
Add to it the fact that nobody on our marketing team has ever hosted anything like a virtual summit before, we had our work cut out for ourselves with recording 50+ interviews and bringing the *(100% free)* Inside Sales Summit to life in under 60 days.

Let's dive straight into the good stuff: performance metrics.

The highlights for our first virtual summit

Since launching the Inside Sales Summit, here's how we've done.

23,329 sessions. The number of unique sessions we saw on the Inside Sales Summit website since it went live on November 5th and for the full month afterwards—through December 5th at which point traffic started to trail off to less than 100 sessions per day.



This number of sessions was driven by 14,170 unique users, suggesting that users returned for an average of 1.65 sessions—most likely over the course of multiple days as new interviews were released throughout the week. This statistic is skewed a bit by people who bounced from the landing page before signing up.

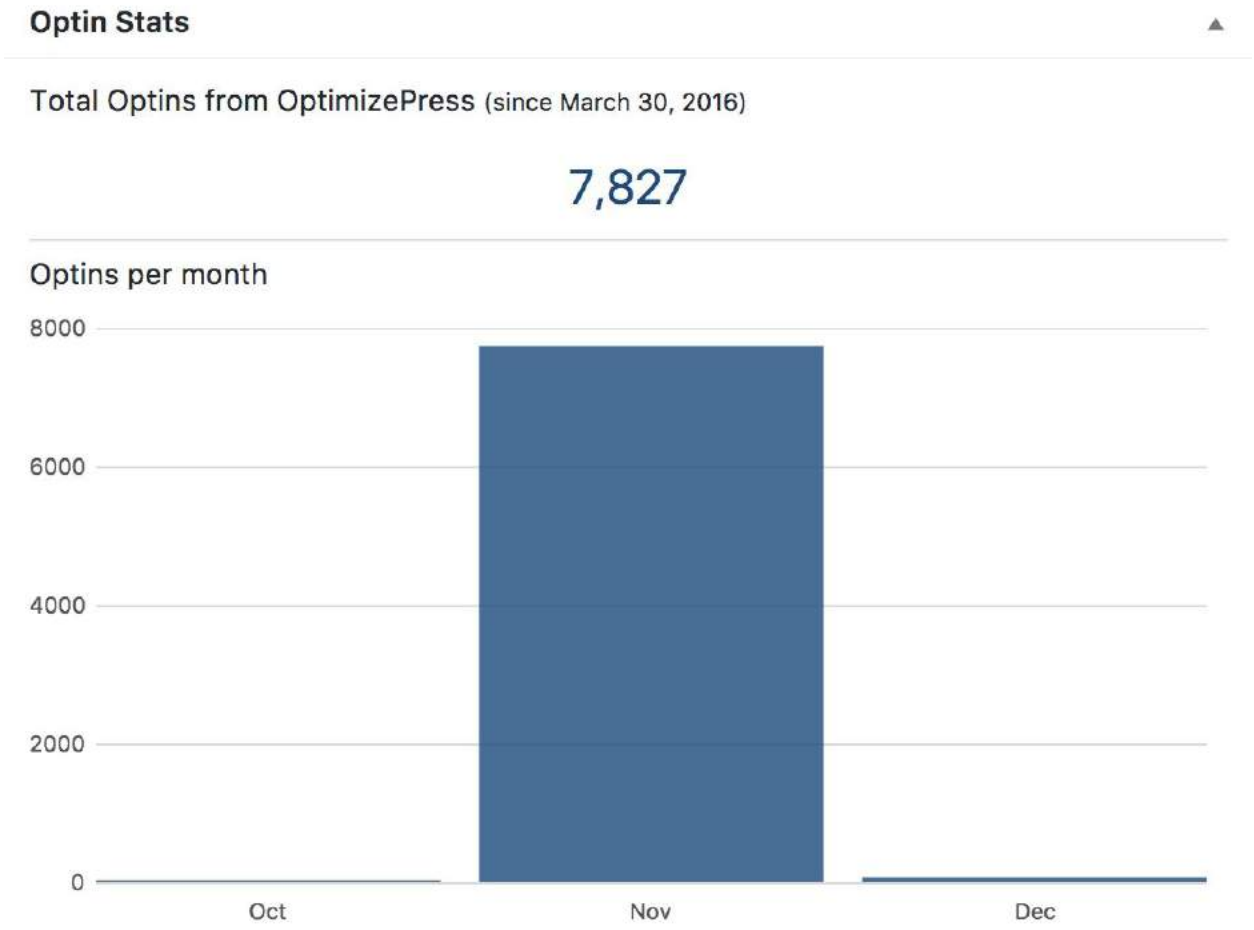
We see the number of pageviews sitting at 57,917, and an average of 2.48 pages per session, which also suggests attendees viewed multiple interviews during a session. That brings us to an average session duration of 2:33. Naturally, this statistic is also skewed heavily by people who bounced from the landing page before signing up, and we've seen that individual interview pages (where the videos are embedded) had average session durations in the three to six minute range.

Take for example Grant Cardone's interview page here:

	Page	Pageviews	Unique Pageviews	Avg. Time on Page	Entrances	Bounce Rate	% Exit	Page Value
		2,215 % of Total: 3.82% (57,917)	2,013 % of Total: 3.97% (50,654)	00:04:49 Avg for View: 00:01:43 (180.19%)	630 % of Total: 2.70% (23,329)	83.02% Avg for View: 53.32% (55.68%)	68.94% Avg for View: 40.28% (71.15%)	$0.00 % of Total: 0.00% ($0.00)
1.	/interviews/monday/grant-cardone/	**2,215**(100.00%)	2,013(100.00%)	00:04:49	630(100.00%)	83.02%	68.94%	$0.00 (0.00%)

7,827 attendees. The number of people who signed up to watch interviews in the summit. Taking the total number of unique users who visited the Inside Sales Summit website

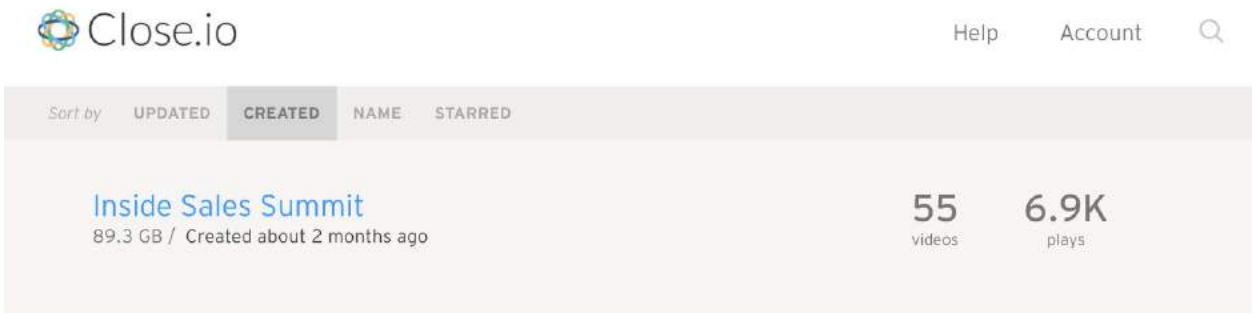
throughout the month (14,170), this gives us a conversion-to-signup rate of *55.23%*. Not bad. This tells us that over half the people who landed on our website signed up during this period, and were within our target market for the event—indicating that our main promotion efforts (partner and speaker emails) were on average, pretty effective.



Subtracting the number of *our own* email subscribers that signed up for the summit, that'll bring us to the total number of net new subscribers we acquired from the event—an important success metric we had (much more on that later).

5,300 net new subscribers. The number of summit attendees that came from our promotional partners, speakers, social media promotion, and press features—*not* from our own existing Close.io community.

6,900+ video views. The number of unique video plays we've seen on summit interviews since going live. Comparing this to the number of attendees that signed up, this statistic makes it clear that not everyone actually followed through on watching an interview.



This is something we expected to some degree, based on average content consumption rates we see, and how much noise & competition for audience attention there is in the sales space.

55 video interviews. By far the most exciting metric to me, getting to personally interview so many incredibly talented, hard-working people for this summit was a blast. From Grant Cardone to Hiten Shah, Noah Kagan, Michele Romanow, and 51 other awesome individuals—*these* are the real people that made this summit such a huge success.



Creating this virtual summit was about much more than just the immediate return we were hoping to get in terms of new email subscribers, trial signups and customers—we knew from the start that this would be a long-term investment in building meaningful, mutually

beneficial relationships with some of the biggest leaders in the sales and startup communities. The collaborations over the years to come is what we're *really* interested in.

That's it for the highlight reel, so let's dig a little deeper into our process for creating this virtual summit, cover what it took to drive these results, the lessons we've learned, what we'd do differently, and what's coming next.

Beginning (most importantly) with determining whether or not *you* should invest the time and resources into creating a virtual summit, if you're considering it today.

1. Defining your purpose and choosing the right virtual summit topic

First let's make an important distinction between having *goals* and having a *purpose*, because they're inherently different. However, proper alignment of the two are very important in planning a virtual summit and deciding whether or not this is the right channel to invest in.

A goal is a concrete eventuality you want to accomplish, while a purpose is *the reason* you're trying to do it. Goals answers the question, *"what?"* while purpose answers the question, *"why?"*.

Before deciding on a theme for your virtual summit and sending out invitations to dozens of speakers, clarify what your greater purpose is for your business (and for wanting to host an event like this in the first place).

Here at Close.io, one of our deepest purposes is to be the absolute best resource on all things inside sales. For years, we've invested countless hours in creating the most in-depth, transformational, actionable content in the form of written posts, guides, videos, podcasts, books, courses, and product features.

Therefore, a virtual summit on the topic of inside sales would align very well with our greater purpose—and give us the opportunity to explore a new medium while bringing in a number of other trusted sources in the inside sales community to contribute from their own unique experiences. This is an all-around win for us because of *what we already do*.

However, you need to objectively determine whether or not you're just chasing the next shiny marketing object and pursuing this idea because you've seen a bunch of virtual summits this year. Following the crowd for the sole reason that a new tactic, strategy or

content delivery medium *appears* to be working well for others, is never a great motivation. That's the fast track to disappointment.

With your organizational purpose (and values) in-hand, take a moment to ask yourself if a virtual summit will be a good vehicle for achieving your greater purpose and be the best allocation of time and resources right now.

Which naturally leads us to…

Choosing a topic for your virtual summit

If you're aligning this event with the overarching purpose of your business, it should be pretty damn obvious which general topic area your summit should be on.

In fact, there should really only be one or a very small number of options that make sense.

As an inside sales CRM, our smartest umbrella topic was clearly going to be inside sales.

If you have a SaaS product like Trello that's designed to help teams manage projects more effectively, then your highest-impact virtual summit topic would likely be on project management or a greater theme that helps teams be more productive in the workplace.

If you have an email marketing tool like ConvertKit that serves a customer base of professional bloggers, then the most natural topic for a virtual summit would tackle the most pressing challenges for your target customers when it comes to email marketing—building a list, engaging your community, and converting them into paying customers or clients.

If you run an online course hosting platform like Teachable, then creating a free virtual summit around the topic of how to launch your first profitable course is about as spot-on as it gets in terms of both delivering relevant value to your existing audience and attracting a new group of potential customers who aspire to achieve that same goal.

You get the picture. At the end of the day, the biggest question you need to answer when thinking through topics is, **what problem (as related to our business) are we hoping to solve with a virtual summit?**

- What do you want to teach your attendees?

- Which tangible skills, lessons, or key takeaways do you want everyone to have at the end of your event?
- Does this relate back to the greater purpose of our business and help accomplish any meaningful business goals?

In my experience participating as a speaker in several virtual summits over the years, the events that tend to be most successful do a great job of covering many different angles within a single, narrow topic area.

So, instead of hosting a virtual summit on a topic as broad as *online business*, *blogging*, or *marketing*, zoom in to a more granular level that allows your event to stand alone as an authoritative resource on the topic.

Just like starting a new business, picking a niche will afford you many benefits with a virtual summit and help ensure that only people within your target market actually sign up to attend.

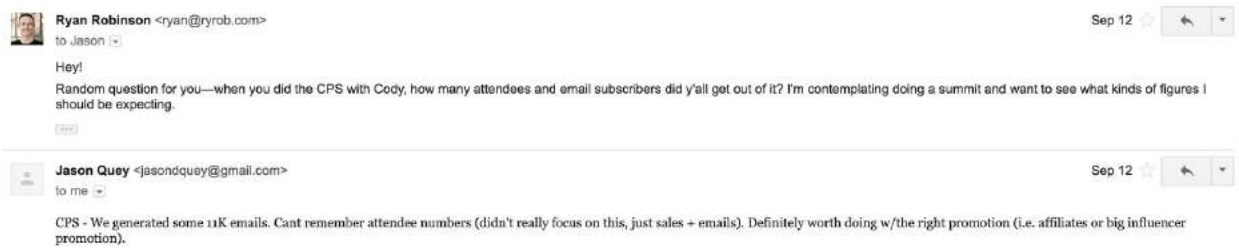
2. Set realistic goals for your virtual summit

Once you've determined the greater purpose for your summit, it's time to get tactical and set the clear (measurable) goals that'll define success for the event.

I'll be the first to tell you how difficult it can be trying to set realistic goals for a type of event you've never actually ran before. It's time to research.

To fill in your knowledge gaps on this front, step number one should be reaching out to people who've already created virtual summits to put together a full picture of how it went for them, the size of their promotional footprint, and what they'd do differently.

So naturally, I reached out to my friend Jason Quey who co-hosted the Content Promotion Summit I spoke at last year, to get some behind-the-scenes details from him.



Ryan Robinson <ryan@ryrob.com> Sep 12
to Jason

Hey!

Random question for you—when you did the CPS with Cody, how many attendees and email subscribers did y'all get out of it? I'm contemplating doing a summit and want to see what kinds of figures I should be expecting.

Jason Quey <jasondquey@gmail.com> Sep 12
to me

CPS - We generated some 11K emails. Cant remember attendee numbers (didn't really focus on this, just sales + emails). Definitely worth doing w/the right promotion (i.e. affiliates or big influencer promotion).

While they were optimizing their online summit primarily for sales, Jason told me they still generated around 11,000 email subscribers from promotion of the event.

Jason also noted the importance of "*doing it with the right promotion"* in terms of affiliates and influencer mentions, something I feel we could've really done a better job with in hindsight—especially when it comes to properly incentivizing the speakers (as paid affiliates) for every person they referred to the summit.

We'll talk a lot more about the promotion and incentive plans we used in a bit.

For now, we're still on goal-setting.

Which type of virtual summit goal is most important to you?

Before jumping into the planning phase of your virtual summit, you need to get clear on which kind of goal you're going to optimize for—because that'll heavily influence every decision you make moving forward.

Ask yourself these three questions to land on the right goal for your unique situation.

1. Are you hoping to immediately drive revenue?

Do you plan on directly monetizing your virtual summit through ticket sales or an all-access pass like Jason did with his Content Promotion Summit? In other words, are you testing your way into the online events business?

If the purpose of your summit is to be a new source of revenue for your business, then keep that top of mind as it'll have a major effect on all of the key planning decisions you're about to make. Free signups aren't worth much to you in this case unless you're focused on converting them into direct ticket or "lifetime viewing" access sales, so the size of the email list you build from the virtual summit won't be as important of a metric if your aim is to generate revenue directly from the event.

2. Is your primary purpose lead generation for an existing product or service?

After the event or during it, are you planning on upselling attendees on a related product or service offering that's currently at the core of your business?

Creating an online summit for the primary purpose of building your marketing email list, generating new leads, or getting trial signups for your existing business means that your event should likely be free (or inexpensive) to attend, since your plan is to monetize the audience otherwise.

This is the goal we chose to optimize our virtual summit for, so the number of net new email subscribers we'd acquire became the most important metric signaling success of the event.

3. Are you using the summit to launch (or validate) a new solution?

If you're launching a new business, laying the groundwork for releasing a new product line, or testing your way into a new type of service offering, using a virtual summit to build an initial community (of potential customers or even just for feedback) and start the process of validating an idea can be very effective.

However, if you're going with this route—that means your *future* product or service doesn't yet exist, so you'll need a very well thought-out engagement plan for staying in close communication with the attendees who sign up for the summit. If you'll eventually be asking them for feedback or to pre-order your upcoming solution, you'll need to keep them engaged starting immediately after the event wraps up.

In any case, your most important metric to track against for a summit that's designed to help validate a new solution will most likely be email subscribers. After the event, you'll be able to peel off as many one-on-one conversations as possible so you can really get to know your target customers and understand their problems to push forward building something that'll have a meaningful impact in your space.

Choosing your goals and making them measurable

Now, let's talk about making your virtual summit goals measurable and actually doable, taking into account the lessons you can learn from our event.

And I want to do that by examining some of the logic behind the summit goals we set for ourselves, and discuss other common goals you could have for creating a virtual summit.

Email subscribers

In my experience, the most common goal people and brands have for creating a virtual summit, is acquiring new email subscribers that can be added to your marketing list, and later converted into becoming trial users or paying customers after the summit concludes.

Years ago, we committed to going all in on content marketing as a primary growth strategy for bringing new subscribers, trial users and customers into our product. That investment has paid off in measures and continues to do so for us.

We viewed creating a virtual summit as an extension of our greater content marketing strategy, designed to bring new top-of-the-funnel leads into our marketing engine and work to convert them into trial users and eventually customers. We also know that we can expect a certain average number of conversions from every one person who enters our marketing funnel.

On top of that, it became very clear that the lifetime value of converting just a couple of subscribers from our virtual summit into paying customers, would far eclipse an immediate one-time revenue spike from ticket sales or an all-access pass to the event.

So, it was a natural decision that the event should be free (to lower the barrier to signup) and that our goal would be new new email subscribers to fuel our marketing funnel.

But how many new subscribers do we think we can get?

Armed with my friend Jason's results in terms of email subscribers they acquired from their online summit last year and a few other summit performance metrics I found from poking around in Facebook groups and talking to friends, we landed on what felt like a realistic target for email subscribers we expected to get from our own summit.

25,000.

Now, if you've been paying attention, you'll notice that we fell *way* short of this goal—only generating 5,300 net new email subscribers when it was all said and done.



Later on in this post, I dig much deeper into the *many* reasons why we missed this target by so much, but here are a few of the biggest contributors.

- The person (me) in charge of creating was also doing the promoting.
- We set our subscriber goal before actually confirming partnerships and tallying up our full email list exposure.
- There were several partner confusions, mix-ups and last minute cancellations.
- We didn't set clear promotion asks and expectations with all speakers.
- We ended up not landing most of the biggest speakers we had conversations with, due largely to scheduling conflicts. Surprisingly, people like Robert Herjavec, Gary Vaynerchuk, Tony Robbins, Tim Ferriss, and Daymond John tend to schedule their events further than two months in advance 😁

Calculating your subscriber acquisition goal

In general, our two-month timeline for organizing this summit really put some limitations on the number of subscribers we ended up getting. Both in terms of the number of partnerships we could secure and the amount of attention we could get on their marketing schedules with relatively short notice.

If like us, you're going to primarily rely upon speakers and partners promoting your virtual summit and driving in signups, take into account how much time you have leading up to the launch of the event—and what time of year that'll be.

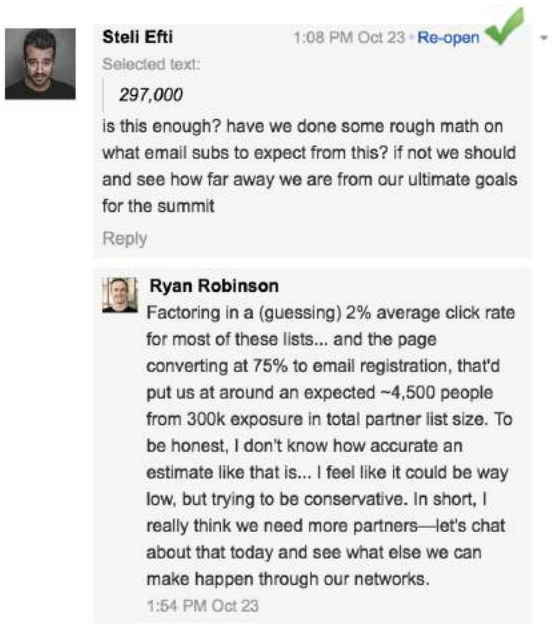
In retrospect, we would've preferred not to host our first summit (for inside salespeople) during the busy and often stressful Q4 holiday season. And the more time you have, the better as far as making room on the busy marketing calendars of speakers and brands that are frequently selling and promoting to their own audiences.

Time to do some math

This will show you just how important it is to line up all of your promotional partners and big speakers who agree to share the event *before* even moving on from this stage—because if you don't get your math right, your chances of hitting your subscriber goal are slim.

A few weeks before the launch of our summit, we were sitting at a total email list exposure of *297,000* people, factoring in our earliest committed partners like Sales Hacker, Zoom, Mattermark, and a couple speakers with big audiences.

After doing some back of the napkin calculations (again, for an event type we've never actually done before), it was pretty clear this probably wasn't going to be enough exposure to hit our subscriber goal.



The eternal optimist I am, I assumed that we'd be see an average of a 2% click rate from our partner emails—which I knew would be doable with my own engaged email list when sending a dedicated email, so that should hold true to everyone else too right? 😉

Based on an exposure of 297,000 subscribers from partner lists, 2% of people clicking through gives us 5,940 hits to the landing page for the summit.

Again with the optimism, I assumed we'd convert 75% of landing page visitors into actual event signups (remember, this figure ended up being closer to *55%*).

All in all, we were hoping to convert an average of 1.5% of the people our summit was exposed to via email from our partners and speakers.

So if these assumptions held true, that 297,000 subscriber exposure would give us just shy of 4,500 subscribers.

This was a major *"oh shit"* moment for me, as it was becoming clear we'd be nowhere near our goal of 25,000 subscribers, shy of a miracle at this rate. So, I shifted my focus way over to working on securing more partnerships as much as I could.

That's when I really started working my ass off and got Grant Cardone, Jill Konrath and Aaron Ross all on board to speak and send dedicated emails to their audience. Factoring in a few more partners I was able to quickly secure like Sales For Life, Ben Sardella's OutboundWorks, Clearbit and Zapier, that brought our total estimated list exposure up considerably.

We were now sitting at *945,000* people our summit would be exposed to, and given the same calculations I'd used before (a roughly 1.5% conversion to signup), I estimated we'd end up getting closer to ~15,000 event signups.

And again, that proved to be too optimistic.

Our effective conversion rate was actually **.83%**.

What we think is a relatively low conversion figure ended up being due to a number of factors that we dig into later in this piece.

My advice?

If your primary goal is to generate email subscribers with your virtual summit, dedicate the early stages of your planning solely to getting big speakers and partner brands on board that are willing to promote the summit to their email lists via dedicated emails (and get the list sizes in writing).

Depending upon how you're incentivizing your speakers and partners—with an email list share of attendees, affiliate revenue for each signup they drive or otherwise—your goal is to get them *excited* about wanting to share the event with their audience.

Make it abundantly clear what they stand to gain from promoting and push that value prop.

When doing your conversion math, fight hard against your optimism and plan for a much lower signup rate than sounds feasible—I'd recommend choosing somewhere between .5% and 1% so that you're setting expectations that won't lead to disappointment.

Anything above that rate and you'll be pumped about the results.

Trial signups

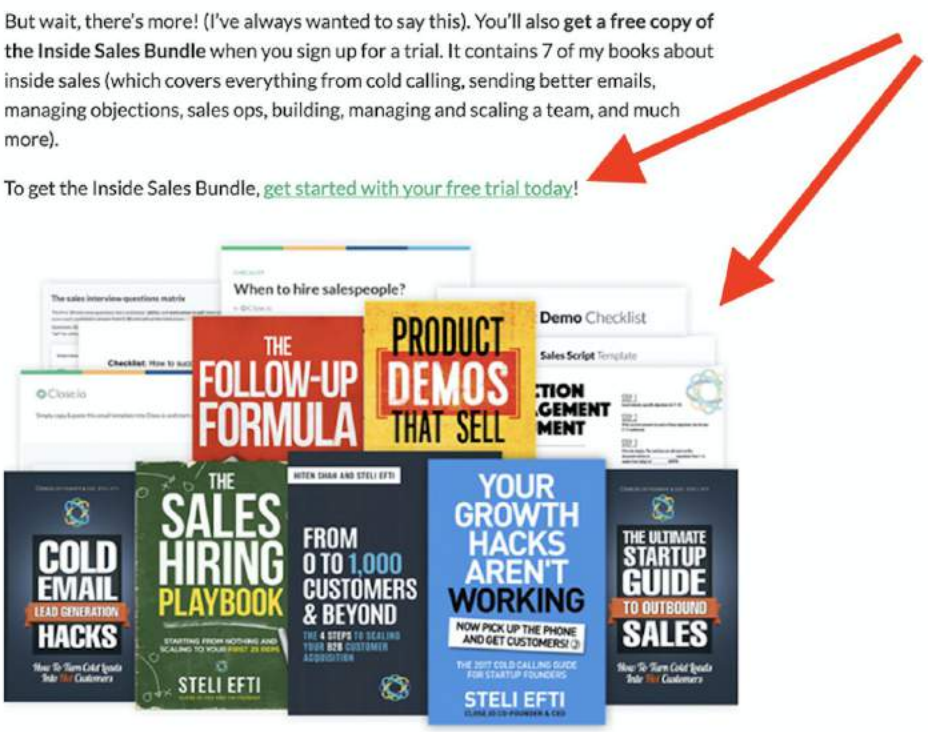
A more direct connection to meaningful business goals than just email subscribers for your marketing list, choosing to optimize your virtual summit for trial signups means you'll need to be very thoughtful about the speakers and promotional partners you invite.

If you're not worried about building an email list of thousands of new marketing subscribers, and would rather bring in a couple hundred (targeted) new trial users for your business, then your summit should be on a very niche topic with a clear connection to your solution.

Consider making your trial sign up a mandatory prerequisite to enrollment in your virtual summit, that way you're only getting summit attendees who fit within your ideal customer persona and are expressing serious interest in your product.

No matter what you do, if your virtual summit goal is trial signups, be sure to have regular, prominent calls-to-action within the summit videos, on landing pages, and in emails—asking your attendees to sign up for a trial.

Here's a snapshot of our trial signup call-to-action within the daily "lineup" email that went out to all attendees registered for the summit. Keep it simple, don't be too pushy, add more value and always deliver on what you've promised your attendees.



Instead of immediately pushing all summit attendees into a complicated upsell email campaign on all the benefits of our inside sales CRM, we incentivized them to sign up for a trial *in order to get* our free Inside Sales Bundle featuring courses, books and worksheets—a package of additional value that'd help us further qualify our summit attendees as legitimate leads for our product.

So far, we've converted only 16 summit attendees into Close.io trial signups.

Wah, wah. *Much* lower than our expected goal of 250 trial signups.

From the perspective of trial signups (our primary company marketing metric), this first round of our virtual summit has been a failure in the short-term. Missing this goal was a function of two things, really.

First, the number of email subscribers we acquired from the summit was significantly lower than anticipated (31% to goal), so it makes sense that our downstream trial signup rate would also be negatively impacted in a similar manner.

Secondly, our conversion rate from summit signup to trial signup *also* ended up being lower than we expected—leading to an amplified negative effect on the number of trial signups we actually got.

Sales

We can all agree that the ultimate goal of just about any promotional activity is eventually growing your sales. When it comes to a virtual summit, you have a few options for direct monetization.

You could sell tickets for admission at a price point your audience would willingly pay, or make the videos available (for free) only for a short period of time and immediately upsell attendees on an all-access pass to view the interviews they've missed.

This is the route our friends over at the Content Promotion Summit took—directly monetizing their event by making it completely free to register and watch interviews during the day they went "live," and then later making an all-access pass available. This type of sales goal makes a lot of sense if you don't immediately have a *much higher value* product or service you're planning to upsell attendees on after the summit.

As we've already covered, another very popular reason for creating a virtual summit is to build a marketing list that can be immediately upsold on a related course, service offering, or coaching package. This isn't technically direct monetization from the summit, but if you plan appropriately, your subsequent offering should be well-aligned and a natural progression from what attendees learned during the summit.

Regardless of the goal you have for your virtual summit, once you've set it (and triple-checked that it's at least somewhat attainable), it's time to start reaching out to the speakers and promotional partners that'll best help you achieve your goal—and get great content for the summit.

3. Create a target list of speakers (and promotional partners)

As much as you may want to interview Richard Branson, Elon Musk and Mark Zuckerberg for your virtual summit, choosing the guests you'll be reaching out to must be done with your summit goals in mind first.

We broke our speakers down into three main categories so that we could prioritize outreach accordingly—dream speakers, realistic stretch goal speakers, and finally high-confidence speakers that we were sure would say yes for various reasons.

Tier 1: Dream speakers

It's great to have a dream list of speakers to start with, but first ask yourself if having someone like Elon Musk speak in your summit would attract the *type* of people you want before adding them to your outreach list.

For our summit on the topic of inside sales, it was immediately clear that someone like Musk (while awesome as it would be to have a conversation with him) wouldn't exactly attract our target customers to the summit—with his nearly 17 million Twitter followers, we'd get a hodgepodge of people from dozens of different communities and backgrounds.

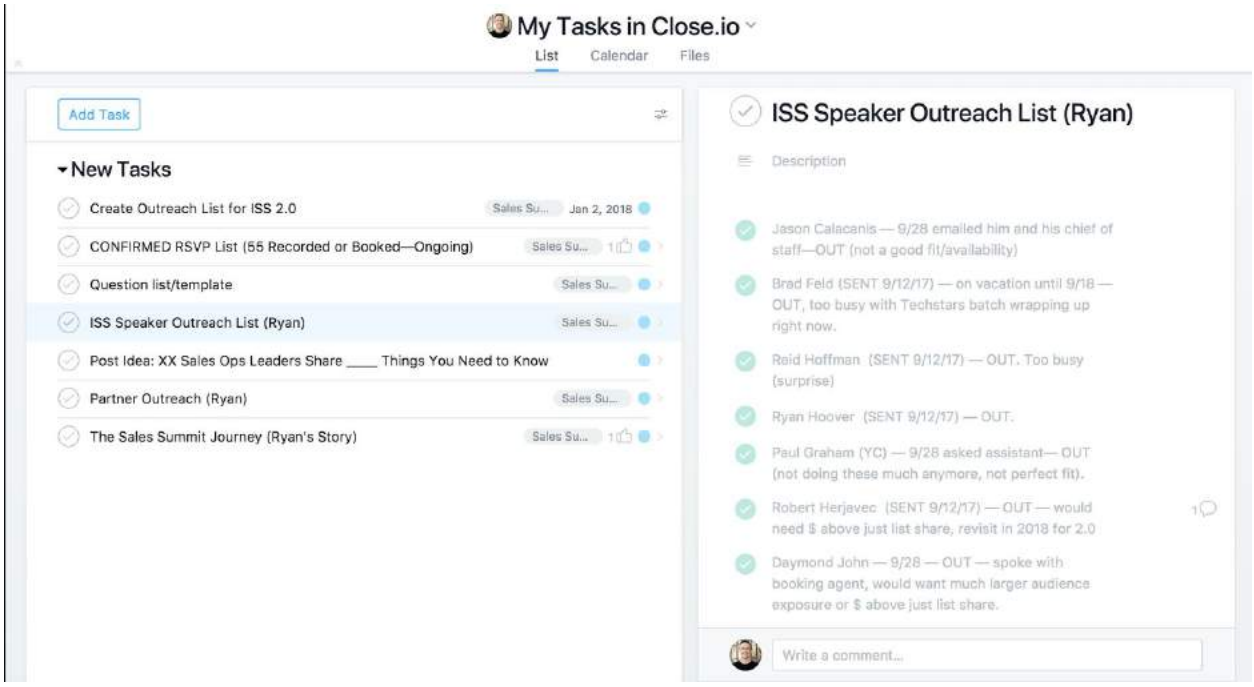
Going back to our goal with the summit, we wanted to focus on driving targeted new email subscribers and trial signups, not just 100,000 people for the sake of getting huge numbers.

Even more importantly, you'll have to take into account how feasible it'll be to actually get your *dream* speakers on board for a free interview in your summit before commiting your own limited amount of time to courting them.

Thirty minutes of free time from someone who has a large business of their own to focus on is a big ask if you don't have any mutual connections who can get you a warm introduction, a massively appealing value proposition for them, or creative idea in mind for capturing their attention and getting them invested in the summit.

So again, with our summit goals top of mind, we started building an outreach list—first with our dream speakers up top—of people who'd be able to attract our desired attendees.

Here's a snapshot of how I managed the outreach to speakers for our summit in Asana.



Right at the top of my outreach list, you'll see a lot of people that didn't make it to our first round of the Inside Sales Summit. A key takeaway for us in creating this virtual summit has been that the "bigger" the speaker, the more lead time they'll need for bookings.

All of the no's we got were for one (or more) of four primary reasons:

- They were too busy during Q4 and already had priorities locked for the year
- They needed more than six or seven weeks heads up to find time on calendars
- The topic wasn't the best fit for what they wanted to talk about right now
- Or they'd need to collect a speaking fee, which we weren't prepared to do

Well-known people with established brands and audiences in the world of startups and sales like Jason Calacanis, Brad Feld, Reid Hoffman, Ryan Hoover, Paul Graham, Robert Herjavec, Daymond John, Gary Vaynerchuk all started at the top of our outreach list because we knew they'd be difficult to land, would take more time to get their attention, and would likely have teams or gatekeepers to go through.

Tier 2: Realistic stretch goal speakers

After adding some more dream speakers like Tony Robbins, Tim Ferriss, Grant Cardone, Eric Ries, Chase Jarvis, and Guy Kawasaki with massive audiences to the top tier on our outreach list, we moved on to the next group of people who we thought should be realistic to land—yet still have very well-established brands in the sales and startup worlds.

That's when we got into a group of people who ended up being much more likely to say yes. Many of the people in this group were established bestselling authors, successful startup founders, up-and-coming keynote speakers, and most importantly—people we tended to have at least a loose connection to.



Inside Sales Summit speakers like Jill Konrath, Neil Patel, Aaron Ross, Trish Bertuzzi, Max Altschuler, Michele Romanow, and Neil Rackham were all in this realistic top tier of speakers we had in mind.

We knew this group of speakers would be able to drive the right audience if we properly incentivized them to share the summit with their email lists and social communities.

Tier 3: High confidence speakers

The last *(but certainly not least)* bucket we put potential speakers into were our high-confidence tier. These are the people we had very close relationships with and were sure they'd say yes to a short video interview.

People like Hiten Shah who co-hosts The Startup Chat podcast with Steli, Noah Kagan who's been on my podcast and is good friends with Steli, Sujan Patel who's friends with Steli, Nathan Barry of ConvertKit who Steli's worked with and Vanessa Van Edwards who I've worked with in the past and regularly quote in my content.

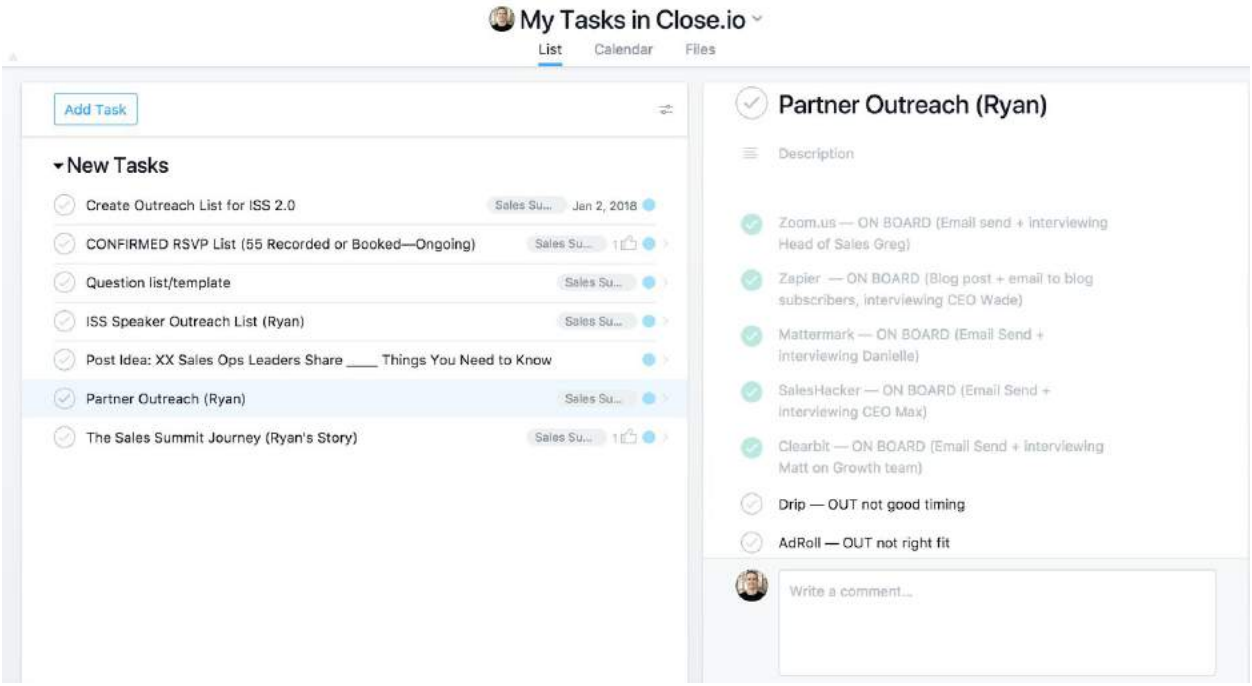
Also in this tier of potential speakers were people we didn't yet have close relationships with, but were sure we could capture their attention and convince them to speak after seeing a few other recognizable names on the lineup.

That included people like Eric Siu, Jamie Shanks, Ben Sardella, Will Barron and others who we knew—going back to our primary summit goal—would be able to drive in an audience of sales professionals to check out the event once we piqued their interest.

Potential partners

Just as important to our goal as bringing in great speakers for our virtual summit, is partnering up with related (non-competitive) brands who also have an audience of salespeople we can tap for drawing to the event.

Thanks to how long we've been in the sales space, we quickly made a comprehensive list of companies that had products, tools and services that served salespeople—but weren't other CRM platforms that compete with our own product (for obvious reasons).



We're talking about companies like Zoom video conferencing, Zapier, Mattermark, SalesHacker, Clearbit, Drip, and AdRoll that all made it onto our list of brands we thought the summit would be relevant to and would have interest in doing a list share in exchange for promoting the event to their audiences.

With all of these potential partners we planned on reaching out to, we wanted to get them invested in the summit beyond just committing to an email send and subsequent list share on the backend, so most of my outreach emails either went to people I wanted to interview for the summit—or mentioned that we'd want to interview someone from their team.

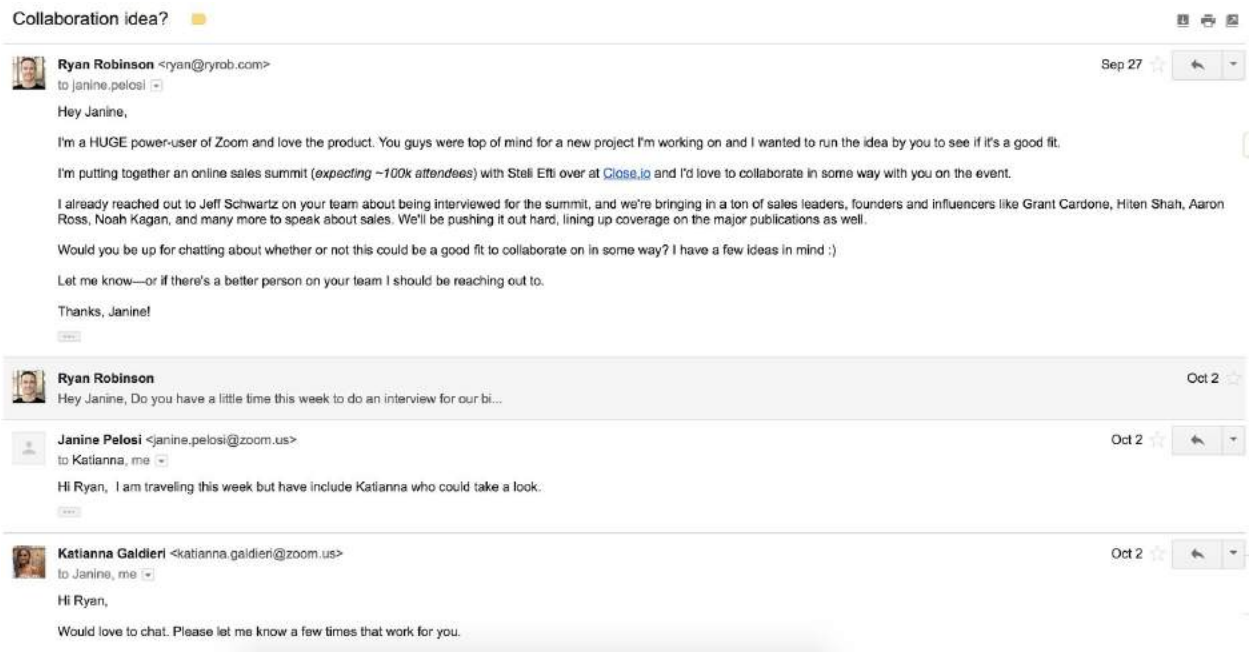
As I was hitting send on my first round of partner outreach emails, I knew we'd have to come across like we knew what we're doing here—and that this summit was a real thing despite the website not being live (or even started on) yet.

So, I started putting together a quick partner deck to make the summit look more professional and give them more confidence in the event. The deck is nothing fancy, just six simple slides that broke down the details of the event, who's participating and what partners will get out of promoting.



Now, here's a screenshot of my initial partner outreach email to Janine Pelosi on Zoom's partnership marketing team. Note that this cold email is customized specifically for them (and not a straight copy & paste template I could blast out to everyone).

Plus, it helped that we were going to record all of the summit interviews using Zoom.



After a few days of not hearing back on my first email, I followed up with Janine and got directed over to Katianna on her team who'd be able to evaluate the collaboration quicker.

Katianna and I hopped on a Zoom call (naturally) the next day, I walked her through the partner deck I whipped up the morning of our call, talked about structure of our upcoming virtual summit, our partner asks, the size of their email list who'd be surfaced the event, who we should interview and they were on board.

Landing this first major partner was a huge psychological win. Now in the rest of my partner outreach and conversations, I could tell them that Zoom is on board, which made it much easier to convince others to get on the summit promotion as well.

This brings me to another of my biggest takeaways from creating a virtual summit…

The first domino is always the most difficult to topple.

As with big-name speakers who don't want to be the *very first* to lend their name and brand to an event like this, the first question brands had about the summit was who else is already a partner—and the more recognizable partners we landed, the easier it became to acquire more.

4. Choose your tools, products and services

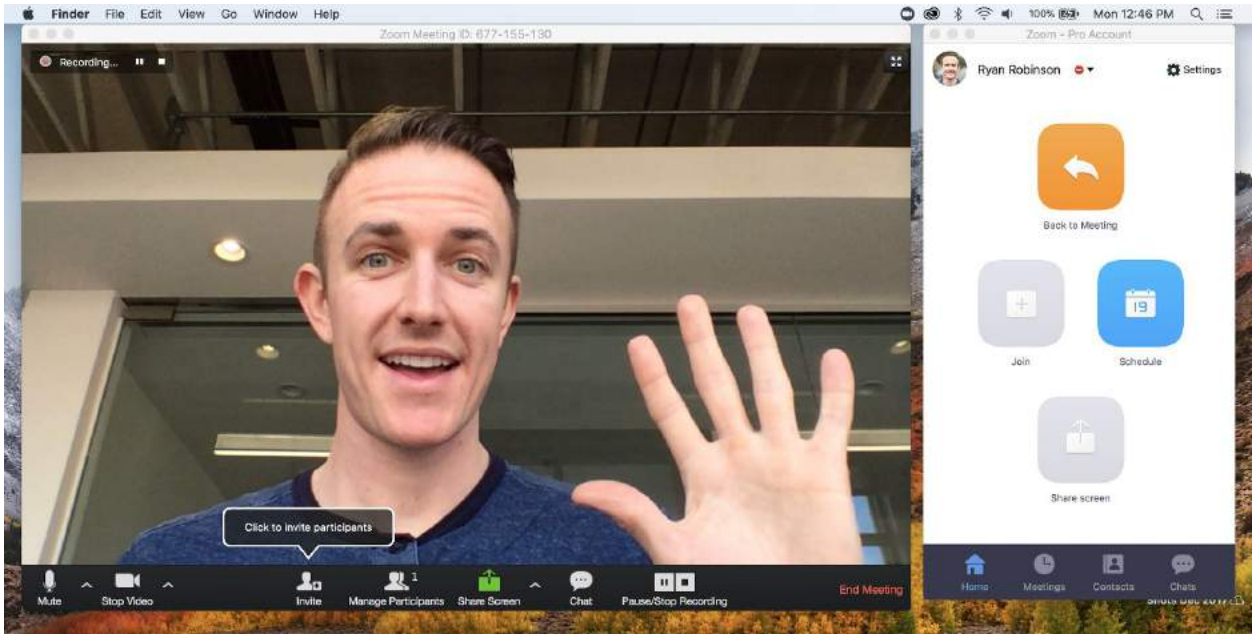
Once you have your tiered outreach list for speakers and partners ready to go, it's important to get your summit tech stack locked in before ramping up your outreach.

These are all the different tools, products and services you'll be using to create the virtual summit. From which tool you'll be using to record the video interviews, to how you'll get the videos edited and hosted, the way in which you'll build your summit website, and so on.

It's important to have these decided upon and figured out well ahead of time so that you don't run into any last-minute hiccups that cause derailment and find that other aspects of your summit suffer because you're scrambling last-minute to find a developer or editor.

Here are all the tools, products and services we used to create the Inside Sales Summit.

Zoom video conferencing and recording.



Even before looking at Zoom as a potential partner for our summit, we decided to use their recording feature to get our summit interviews because of how easy and affordable it is—for just $14.99/mo I grabbed their least expensive plan that allows for video recording. Note that this plan only gives you the option to save recordings to your computer (beyond

their free 1GB of cloud recording on Pro plans) so be prepared to either add a whole lot of GBs worth of video files to your hard drive or upgrade to their cloud recording plans.

Audio-Technica ATR2100-USB recording microphone.



Audio-Technica

Audio-Technica ATR2100-USB Cardioid Dynamic USB/XLR Microphone

★★★★☆ 1,649 customer reviews | 395 answered questions

Amazon's Choice for "atr2100"

Price: $69.08 ✓prime

Get $70 off instantly: Pay $0.00 upon approval for the Amazon Prime Rewards Visa Card.

In Stock.

Arrives before Christmas.

Want it Wednesday, Dec. 20? Choose **One-Day Shipping** at checkout. Details

Ships from and sold by Amazon.com.

style: **ATR2100-USB**

ATR2100-USB	ATR2500-USB
$69.08	$79.99
✓prime	✓prime

- Handheld dynamic microphone with USB digital output and XLR analog output

To be fair, I already had this microphone before we started preparing for the summit since I've been using it for the past year to record episodes of my podcast. But for less than $70, you can't afford not to pick up a microphone like this for your virtual summit and the quality is definitely high enough as long as you're not an audiophile.

Cheap studio ring light setup (by Neewer on Amazon).



Roll over image to zoom in

Neewer

Neewer Camera Photo Video 14 inches/36 centimeters Outer 10 inches/25 centimeters Inner Ring Fluorescent Flash Light for Portrait,Photography and YouTube Vine Video Shooting,50W(400W Equivalent) 5500K

★★★½☆ 185 customer reviews | 57 answered questions

#1 Best Seller in Photographic Lighting Monolights

Price: $57.99 ✓prime

Get $70 off instantly: Pay $0.00 upon approval for the Amazon Prime Rewards Visa Card.

Only 1 left in stock (more on the way).

Arrives before Christmas.

Want it Wednesday, Dec. 20? Order within 22 hrs 43 mins and choose **One-Day Shipping** at checkout.

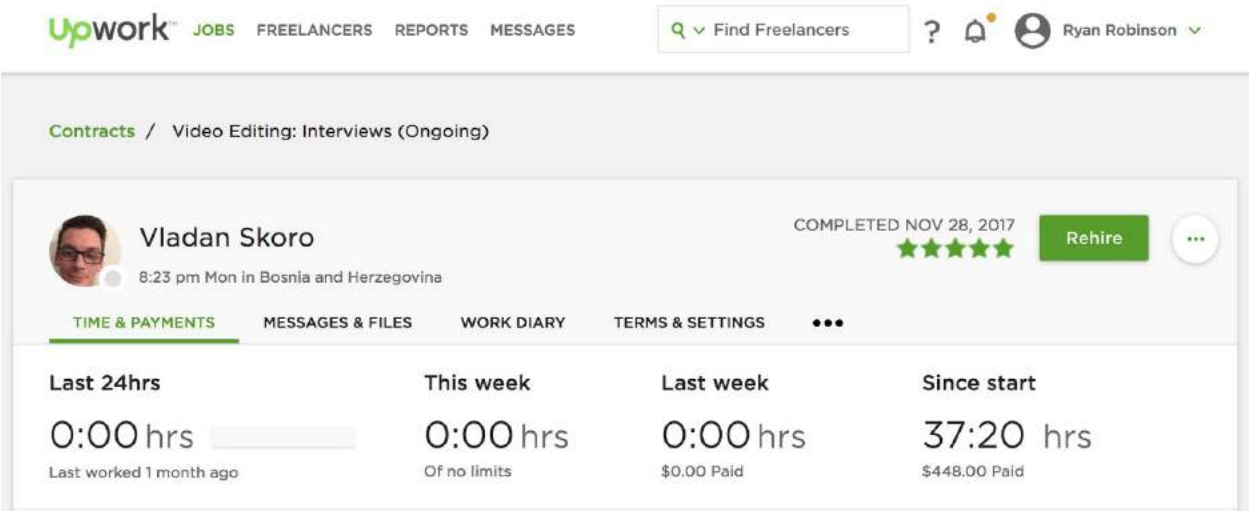
Details

Ships from and sold by Amazon.com. Gift-wrap available.

- 14 inches/36 centimeters Outer 10 inches/25 centimeters Inner ring fluorescent continuous light
- Power: 50W (Equivalent to 400W on an incandescent one)
- With reinforced flexible arm which will move freely and never droop
- Extra long cord and heavy duty thumb screws
- A must have for photography enthusiasts; Note: Light stand and camera are not included

After doing my first interview without direct lighting facing me aside from just natural light and those overhead, it was clear I'd need something quick and easy to light myself and up our production quality—even if just a little bit. This $58.00 ring light I found on Amazon did the trick, and the rest of our interviews in the summit look much better as a result.

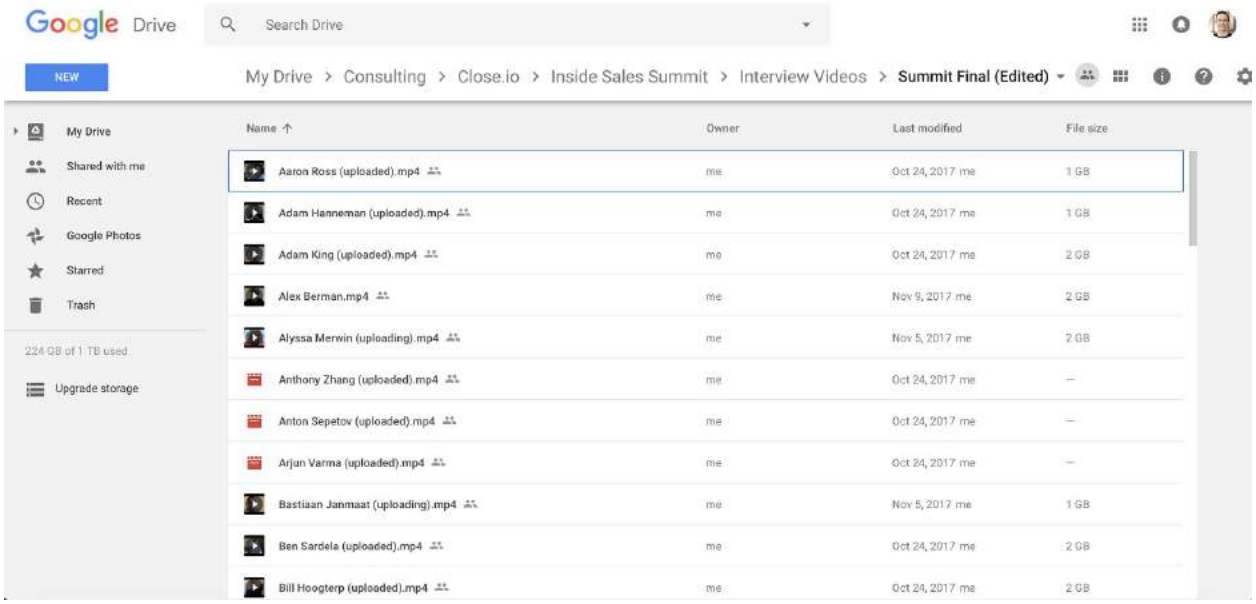
Upwork (kick-ass video editor).



As soon as I booked the first interview for the summit, I went over to Upwork and created a job posting for a video editor & invited a dozen or so of their top suggestions to apply for the gig and send me over a proposal. After sorting through a few portfolios, I landed on (the amazing) Vladan Skoro who turned out to be my savior throughout the summit.

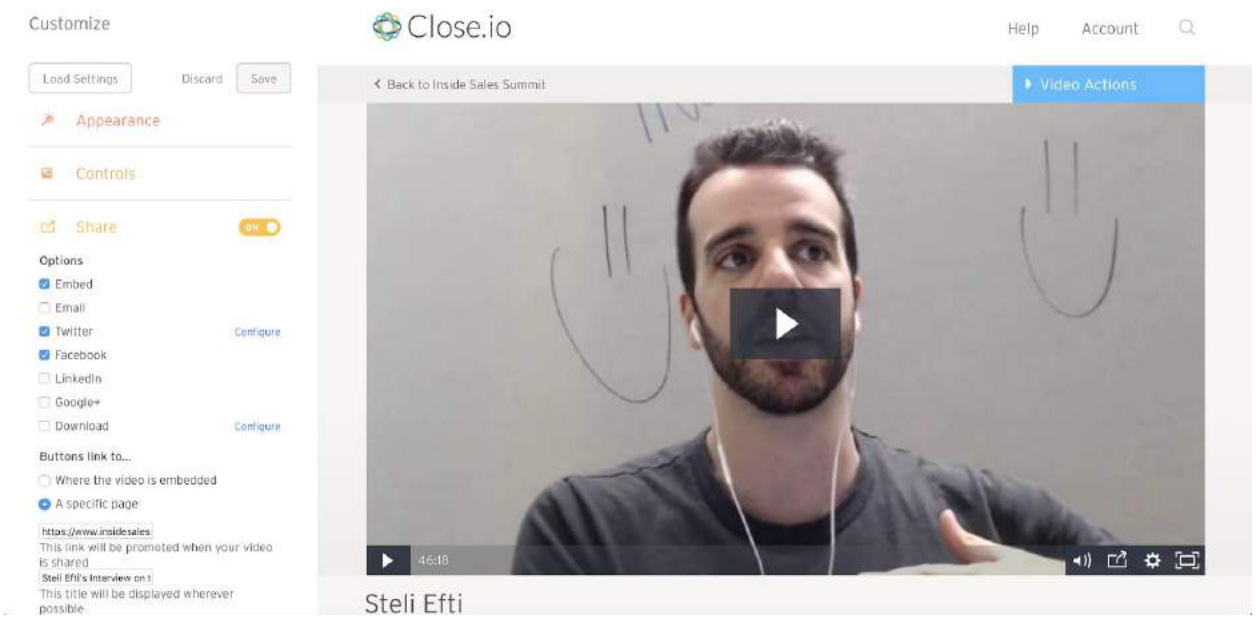
Vladan came up with the video transition graphics we used, trimmed the videos, edited out anything we needed to cut and helped clean up audio quality as we went. When I had a new raw interview recording to send his way, I'd upload it to a shared Google Drive folder, add edit notes and timestamps into our ongoing editing Google document, and he'd get to work—typically turning around videos in less than a day, which kept us ahead of schedule.

Google Drive cloud documents, storage and collaboration.



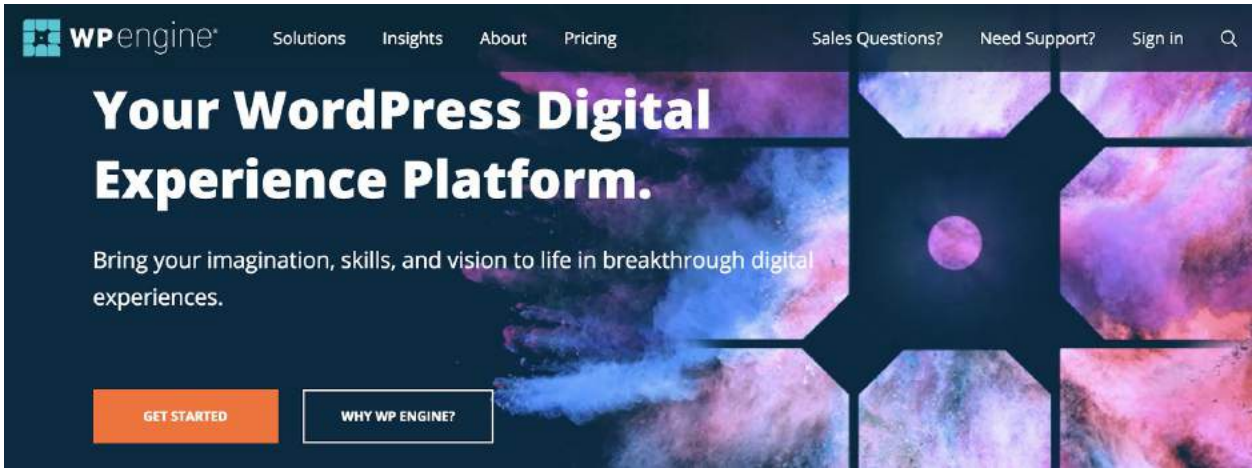
For years, I've used Google Drive and all of their cloud document/storage tools for just about everything in my business. It's such an easy way to collaborate with remote teams (like awesome video editors in Bosnia), organize everything thoughtfully, and keep track of everything I'm working on.

Wistia video hosting.



Extremely reliable video hosting (used by 300,000+ customers) that gives us the best insights on how our videos perform, and much more customizability as far as embedding, sharing options and playing nicely with Wordpress which we used for our summit website.

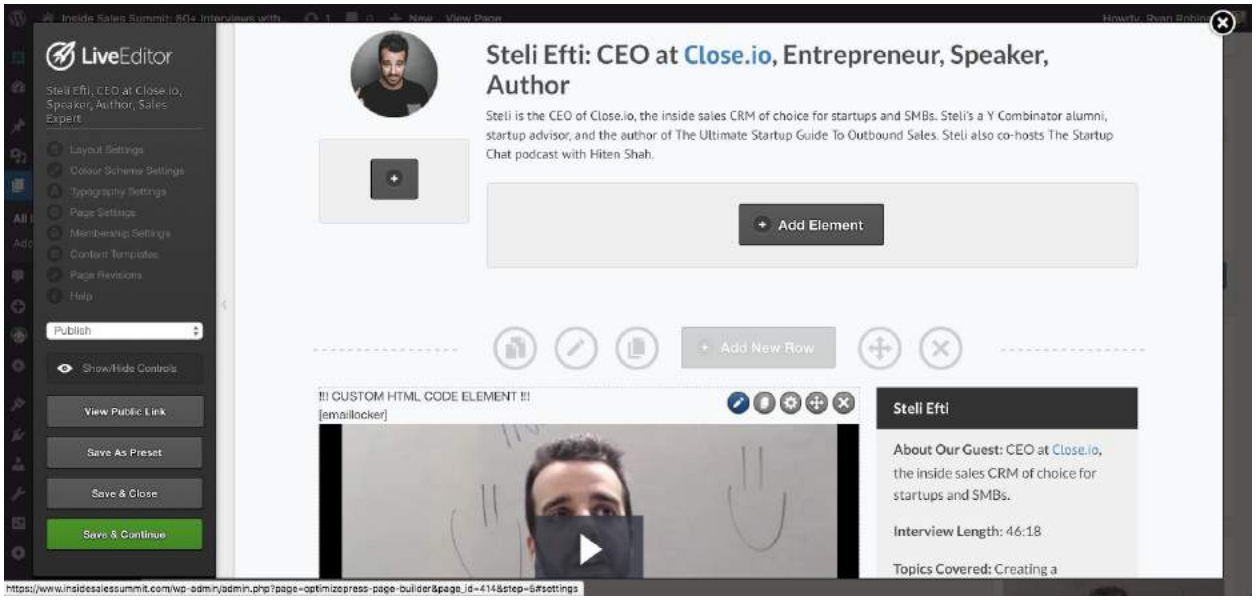
Wordpress and WP Engine hosting.



During our first planning meeting for the Inside Sales Summit, we determined right off the bat that this would be an entirely marketing-driven event so that we could be lean and move quickly without needing to redirect developer resources that have already been allocated months beforehand.

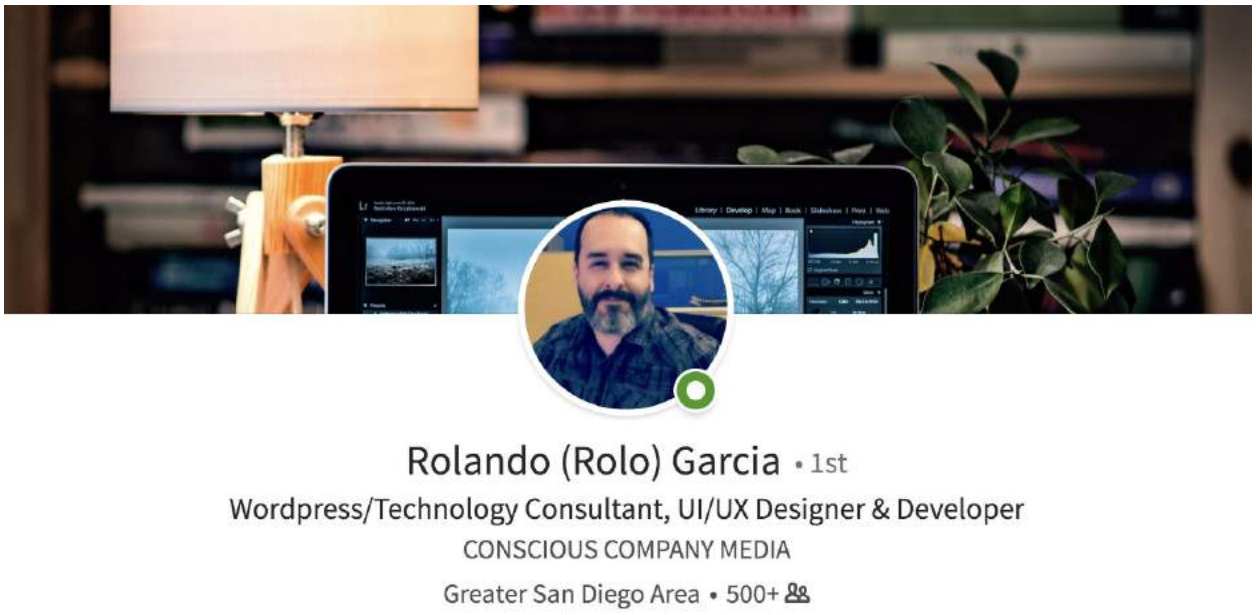
Wordpress was our natural DIY choice because I'm very familiar with it as a CMS (my blog is built on it), and we knew that I'd likely be doing the vast majority of the work building out pages. WP Engine was also a no-brainer for hosting, as they've been by far my most reliable hosting company over the years (and with incredible support)—especially for a site we knew would go from zero to thousands of daily visitors once it we went live.

OptimizePress.



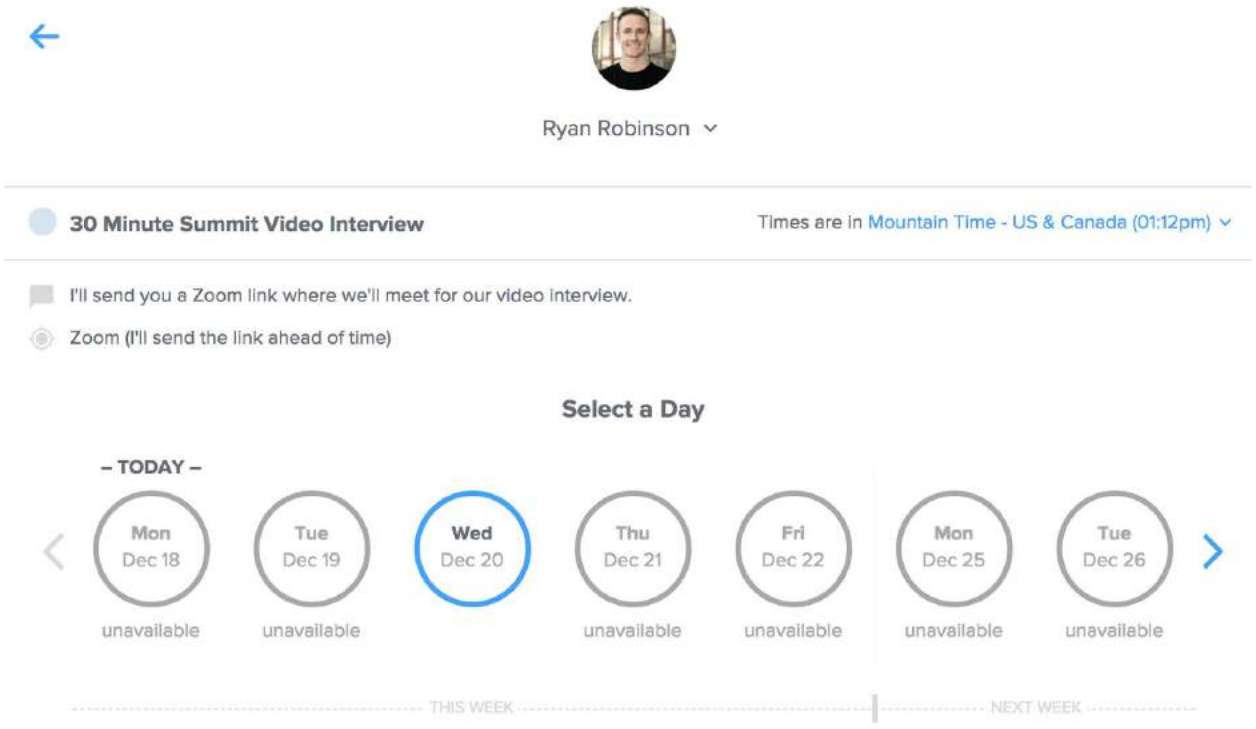
Sticking with what I know best, I turned to OptimizePress—my favorite Wordpress theme that I use to power my blog and all of the projects I launch. I knew this theme would be best for building a simple site like we wanted (where I'd be doing the creating), because it has an easy-to-use visual editor that allows me to skip the need ever really touch HTML/CSS aside from the handful of minor customizations and tweaks we needed to make.

Rolando Garcia, my go-to (awesome) Wordpress developer.



Rolo has long been my go-to Wordpress developer whenever I need to customize my site, add new features that are above my head, or when the shit hits the fan on my blog. We worked together at a previous company, so I already knew he'd be able to handle the custom features and changes we'd need to make to our website (and theme) for the summit. Rolo was super quick, brought great ideas to the table and helped us execute flawlessly.

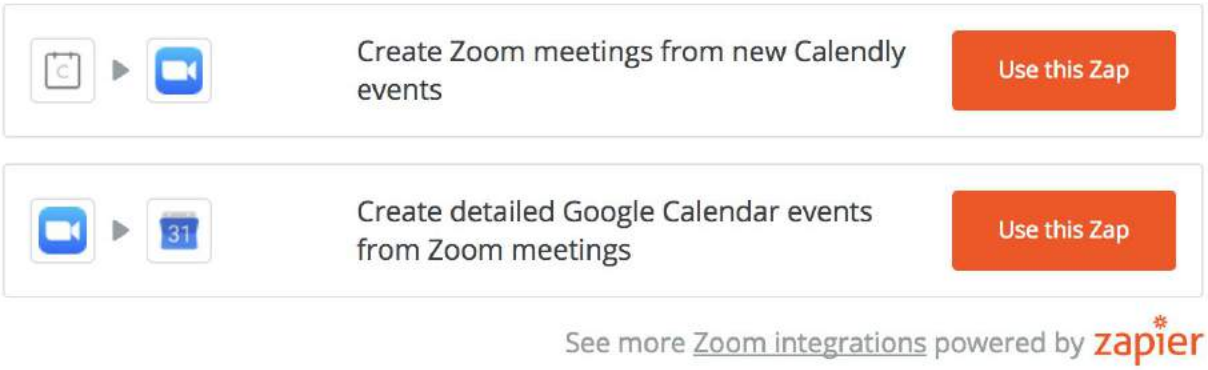
Calendly.



This tool was seriously a life-saver for me when I was in the middle of coordinating 55 interviews for this summit. Instead of the time-consuming back and forth over email trying to find the right time to schedule interviews, I used my Calendly to just send a single link to our speakers and have them (or their assistants) grab the best time that corresponds to openings on my calendar.

For the busiest speakers, I made exceptions and told them I could make absolutely anything work with their schedule in order to increase the likelihood of landing them—and planned to shift other things around to accommodate.

Zapier.



We use Zapier to connect apps and automate workflows for lots of tasks here at Close.io, so I was immediately thinking of things we could do to make this summit creation process flow more seamlessly. For one, I created a Zap to connect new Calendly bookings to new Zoom video meetings—so I wouldn't have to manually go through the process of scheduling *and then* creating corresponding new Zoom meeting rooms, which saved me a ton of time.

With our tools locked down, it was finally time to dive into where I had some of the most fun during the process of creating this virtual summit… outreach.

5. Outreach

I really wanted to get an early win during the first week of planning for our summit. A guarantee that we were going to get *some* results out of this massive endeavor. A sign that would tell me this *has to* at least be somewhat successful.

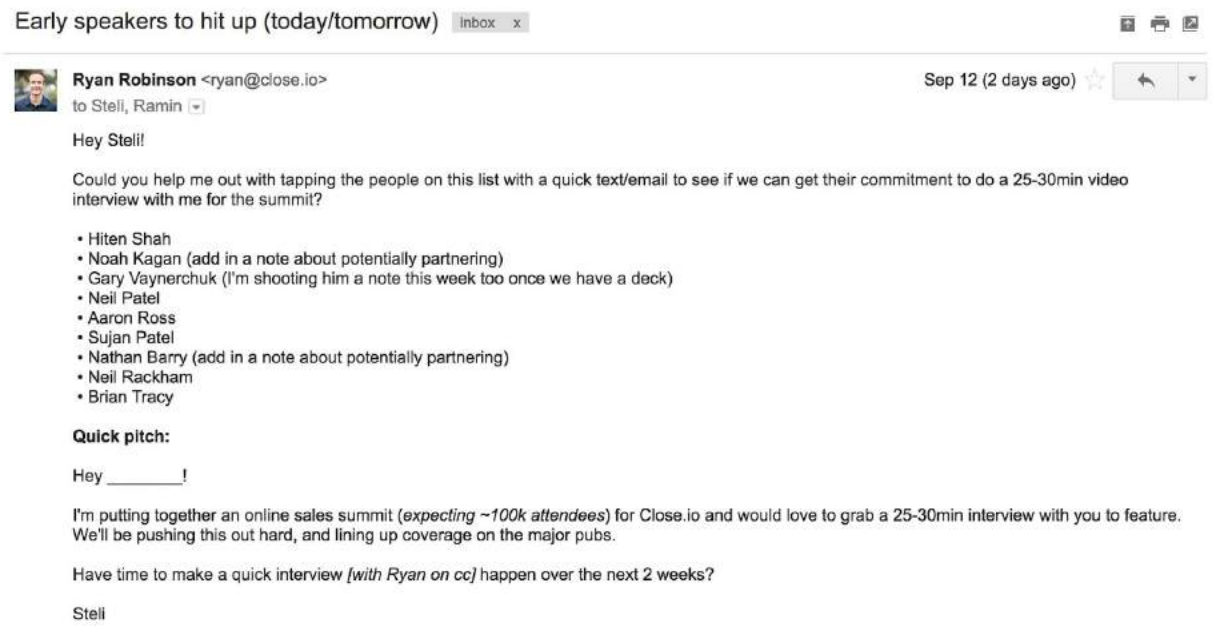
Revisiting our goals for creating a virtual summit in the first place, that meant two things…

1. Landing a name-brand headliner to speak at the summit asap
2. Securing a kick-ass partnership with a brand that could bring a big audience

Going with the path of least resistance, the first direction I moved in was to tap Steli and ask him to activate his network. Steli's already spent years building relationships with entrepreneurs and tons of influential people who are endemic to the startup community.

I wanted to leverage those existing connections as much as possible, but Steli's a busy guy.

So, I did my homework first. I sent him a very clear hit-list of people that *I know* he's close with, asked him to ping them today with the ask of doing a short interview for the summit, and included a copy & paste email template for him to use. Making it as easy as possible.



Early speakers to hit up (today/tomorrow) Inbox x

Ryan Robinson <ryan@close.io> Sep 12 (2 days ago)
to Steli, Ramin

Hey Steli!

Could you help me out with tapping the people on this list with a quick text/email to see if we can get their commitment to do a 25-30min video interview with me for the summit?

- Hiten Shah
- Noah Kagan (add in a note about potentially partnering)
- Gary Vaynerchuk (I'm shooting him a note this week too once we have a deck)
- Neil Patel
- Aaron Ross
- Sujan Patel
- Nathan Barry (add in a note about potentially partnering)
- Neil Rackham
- Brian Tracy

Quick pitch:

Hey _____!

I'm putting together an online sales summit (*expecting ~100k attendees*) for Close.io and would love to grab a 25-30min interview with you to feature. We'll be pushing this out hard, and lining up coverage on the major pubs.

Have time to make a quick interview *[with Ryan on cc]* happen over the next 2 weeks?

Steli

Right away, Steli sent this email to almost everyone on the list, and by the end of the day we had our first 6 confirmed speakers…

- Hiten Shah
- Noah Kagan
- Neil Patel
- Aaron Ross
- Sujan Patel
- Nathan Barry

Ok, awesome. That weight on my chest is starting to lift a bit now that we already have some reputable speakers RSVP'd for the summit—which made the next few weeks of outreach much easier since we could lean on the credibility of the people already on board.

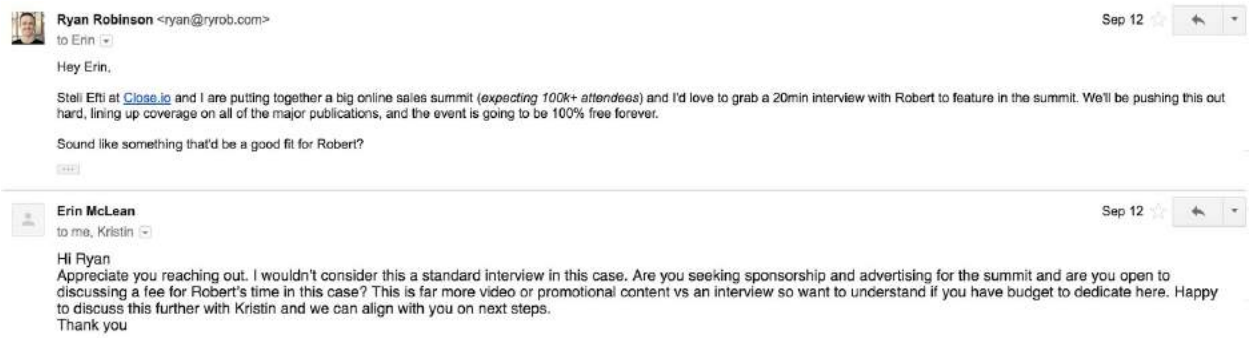
Next, I started turning to prospects in our high-confidence tier within my own network and also began going after the biggest fish from the top of our outreach list simultaneously.

Leveraging the relationships I've built with entrepreneurs, founders and bestselling authors that came through CreativeLive to teach classes during my time running content

marketing for their business classes, and people I've quoted on my blog, I started at the top of the list.

Knowing that I'd recently quoted him for a post about sales strategies on our blog, I reached out to Robert Herjavec's team (an entrepreneur and investor on *ABC's Shark Tank*).

Right away, I could tell this was going to get some pushback with the bigger prospects…



Ryan Robinson <ryan@ryrob.com> Sep 12
to Erin

Hey Erin,

Steli Efti at Close.io and I are putting together a big online sales summit (*expecting 100k+ attendees*) and I'd love to grab a 20min interview with Robert to feature in the summit. We'll be pushing this out hard, lining up coverage on all of the major publications, and the event is going to be 100% free forever.

Sound like something that'd be a good fit for Robert?

Erin McLean Sep 12
to me, Kristin

Hi Ryan
Appreciate you reaching out. I wouldn't consider this a standard interview in this case. Are you seeking sponsorship and advertising for the summit and are you open to discussing a fee for Robert's time in this case? This is far more video or promotional content vs an interview so want to understand if you have budget to dedicate here. Happy to discuss this further with Kristin and we can align with you on next steps.
Thank you

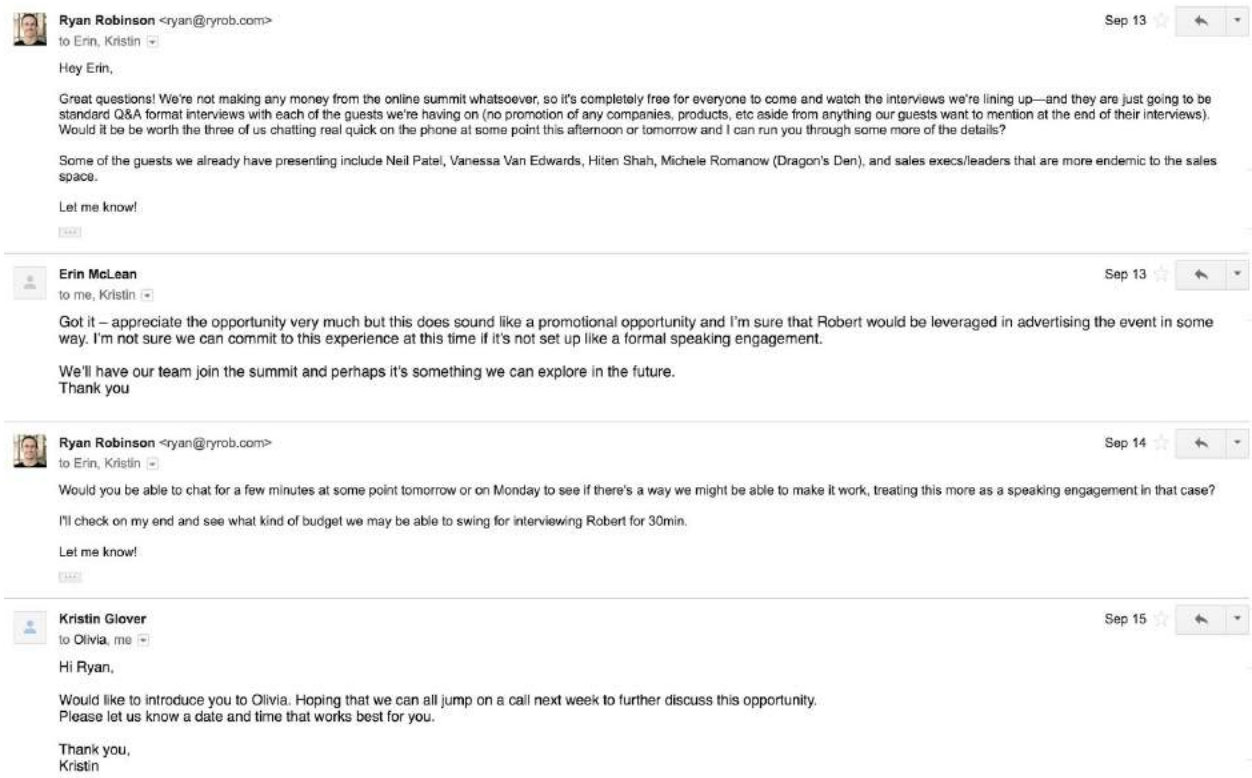
Herjavec's team was interested, but their first question was about whether or not we'd be offering a speaking fee. Understandable, right? Herjavec's time has a very high value, so his team has to protect it as much as possible and make sure it's being utilized in the best possible manner for his businesses and various other commitments.

However, shelling out a speaker fee was tough for us to consider, since this summit was going to be completely free and we weren't planning on directly monetizing the audience that came through.

Sure, we knew some people would sign up for Close.io trials down the eventually, but we knew that our first go-round with a virtual summit would be a very long-term play—in short, we didn't plan on seeing an instant financial return.

I could tell that this first reply from Herjavec's team wasn't a definitive no—it was more of a *maybe no*. So, I replied back to them offering up some more context around the event, attempting to frame it in a way that made clear we weren't going to be charging people to attend and the primary purpose wasn't to directly monetize hosting this event.

Knowing I could explain this more clearly over the phone, I asked if they could hop on a call to chat through the details. That got me directed over to Olivia on Herjavec's communications team, but I landed a call with her to at least explain the summit.



Ryan Robinson <ryan@ryrob.com> Sep 13
to Erin, Kristin

Hey Erin,

Great questions! We're not making any money from the online summit whatsoever, so it's completely free for everyone to come and watch the interviews we're lining up—and they are just going to be standard Q&A format interviews with each of the guests we're having on (no promotion of any companies, products, etc aside from anything our guests want to mention at the end of their interviews). Would it be be worth the three of us chatting real quick on the phone at some point this afternoon or tomorrow and I can run you through some more of the details?

Some of the guests we already have presenting include Neil Patel, Vanessa Van Edwards, Hiten Shah, Michele Romanow (Dragon's Den), and sales execs/leaders that are more endemic to the sales space.

Let me know!

Erin McLean Sep 13
to me, Kristin

Got it – appreciate the opportunity very much but this does sound like a promotional opportunity and I'm sure that Robert would be leveraged in advertising the event in some way. I'm not sure we can commit to this experience at this time if it's not set up like a formal speaking engagement.

We'll have our team join the summit and perhaps it's something we can explore in the future.
Thank you

Ryan Robinson <ryan@ryrob.com> Sep 14
to Erin, Kristin

Would you be able to chat for a few minutes at some point tomorrow or on Monday to see if there's a way we might be able to make it work, treating this more as a speaking engagement in that case?

I'll check on my end and see what kind of budget we may be able to swing for interviewing Robert for 30min.

Let me know!

Kristin Glover Sep 15
to Olivia, me

Hi Ryan,

Would like to introduce you to Olivia. Hoping that we can all jump on a call next week to further discuss this opportunity.
Please let us know a date and time that works best for you.

Thank you,
Kristin

After Olivia and I found some time to connect and I got the opportunity to better explain the summit and hear more about how we could make this more appealing to Herjavec, the answer turned into a solid no.



Olivia Horner Sep 19
to me

Hi Ryan,

Thank you for taking the time to connect yesterday. Spoke with the team and at this time it is not something we can support but we wish you well for the summit!

Kind regards,
Olivia

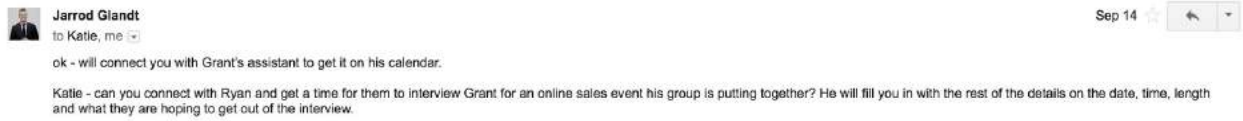
At the end of the day, a few factors contributed to Herjavec not being able to participate on this go-round of the summit—including short timelines and lack of budget—but they made it clear that there's still more potential for collaborations in the future.

Bummer, but it was still early days and great speaker confirmations were already rolling in.

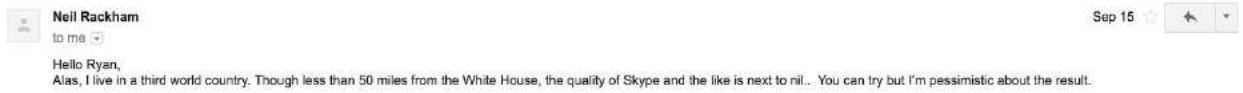
Chase Jarvis, CEO at CreativeLive… confirmed.



Grant Cardone, sales educator, entrepreneur and bestselling author… confirmed.



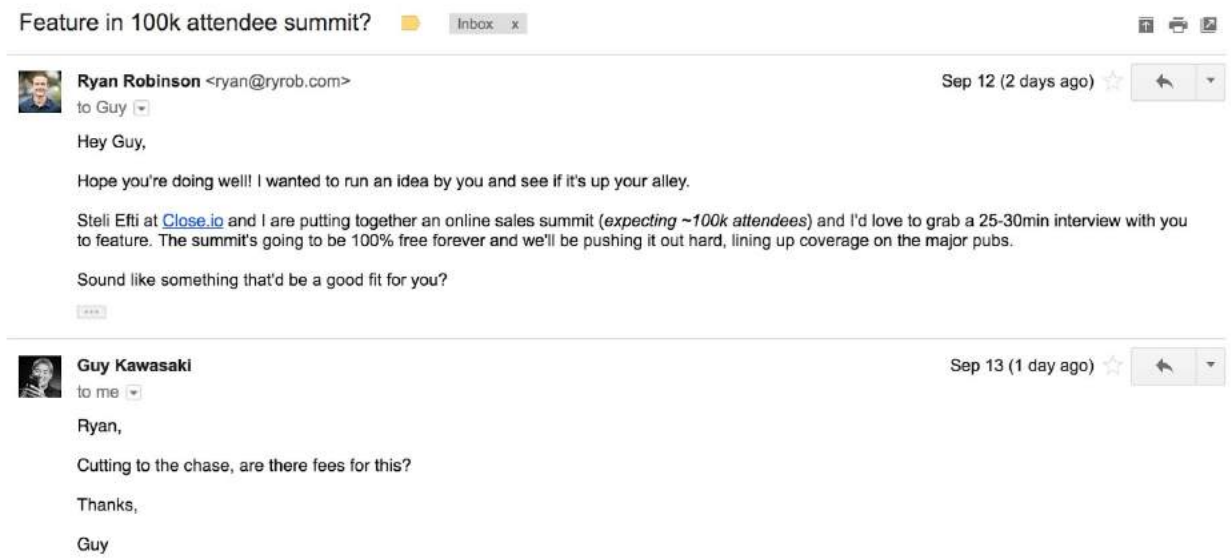
Neil Rackham, bestselling author of *Spin Selling*… confirmed.



Next on my list of big potential speakers to land for the summit was Guy Kawasaki.

I've quoted Guy several times over the past few years in articles on my blog, for CreativeLive when he taught a class, and on my Forbes column, so I had a pretty strong feeling he'd at least check out any email I sent his way.

Here's that initial outreach email…

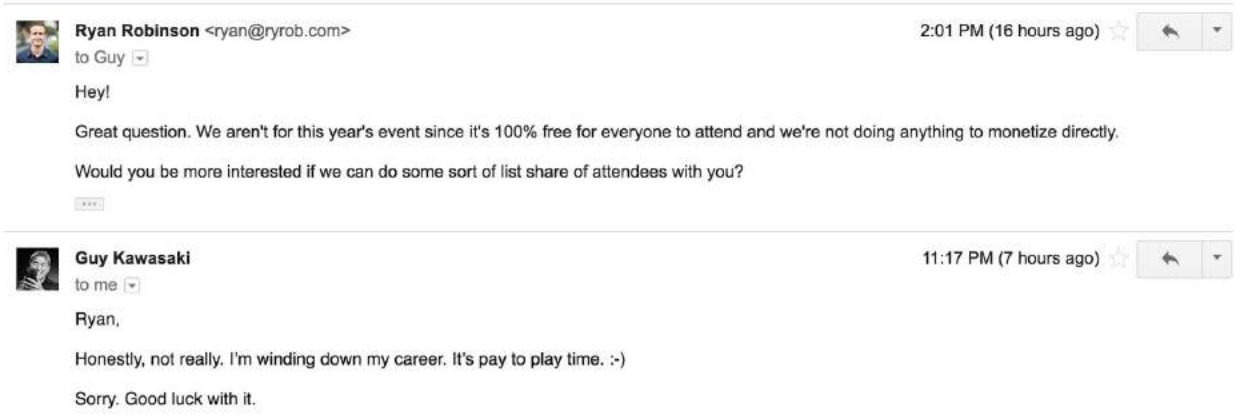


Damn. Though I have to admit, I really appreciate how upfront he was.

Still, I hit the same primary hurdle I encountered with Herjavec's team—speaker fees. Unlike the response from Herjavec's team though, I could tell this was going to be a bigger sticking point with Guy so I wanted to gauge his interest on our other value prop: audience.

So I brought up the email list share opportunity.

I offered up the idea of sharing our attendee list with him in exchange for speaking at the summit for free, something we were already planning on doing as an incentive for most speakers and partner brands. And he got back to me with this…



Ryan Robinson <ryan@ryrob.com> 2:01 PM (16 hours ago)
to Guy

Hey!

Great question. We aren't for this year's event since it's 100% free for everyone to attend and we're not doing anything to monetize directly.

Would you be more interested if we can do some sort of list share of attendees with you?

Guy Kawasaki 11:17 PM (7 hours ago)
to me

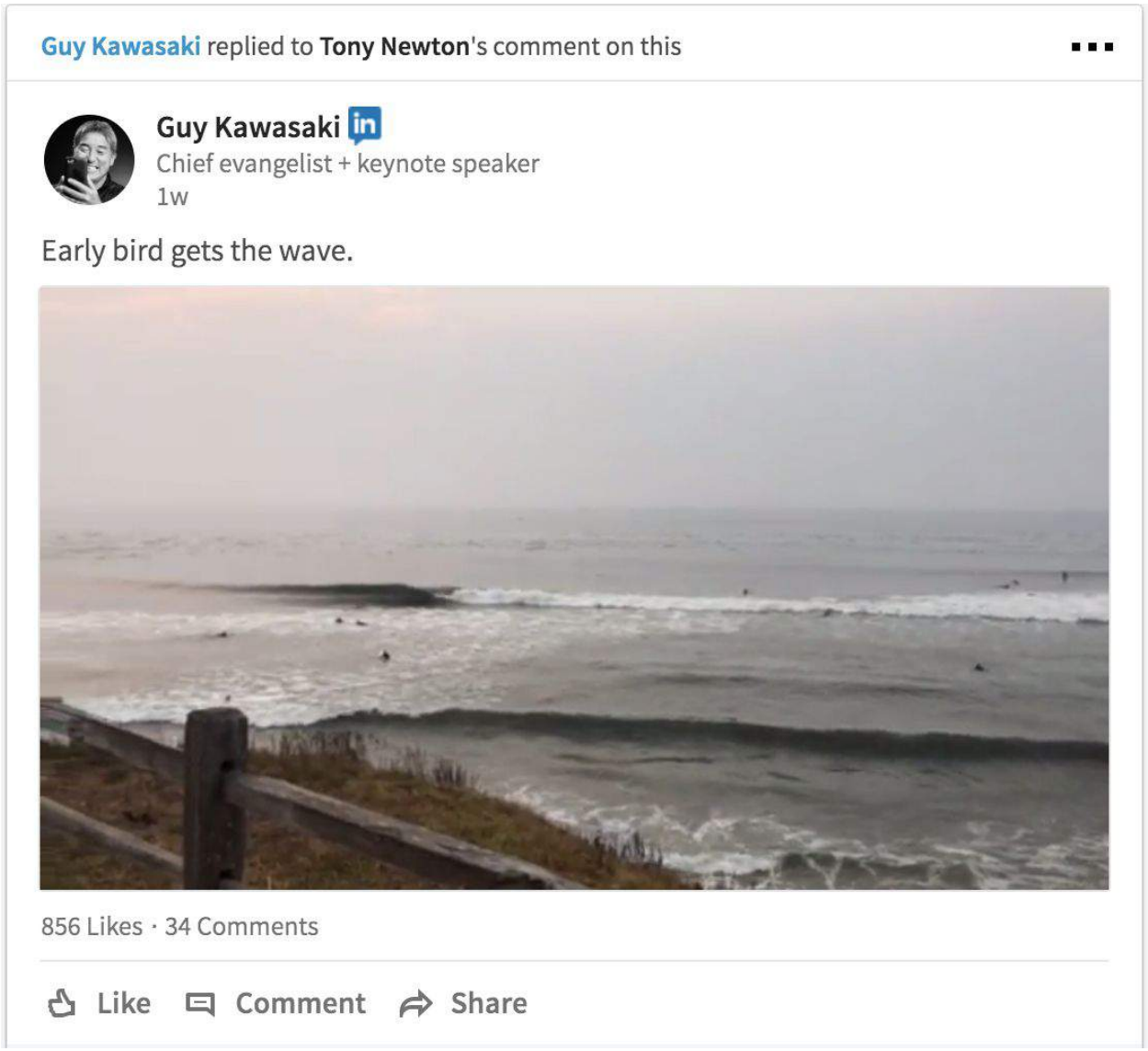
Ryan,

Honestly, not really. I'm winding down my career. It's pay to play time. :-)

Sorry. Good luck with it.

Pay to play time. Guy's out.

I get it. Makes sense for where he's at in his career. Come to think of it, he's been posting a lot of pictures surfing in Santa Cruz during the "work week"…



It was time to move on to more speakers from our dream list.

Of which surprisingly, Reid Hoffman wasn't available either…

Fwd: Feature in 100k attendee summit? Inbox x

Elisa Schreiber <[redacted]@greylock.com> 10:04 AM (3 minutes ago)
to me

Hi Ryan - Thank you so much for reaching out. Your note was forwarded to me because I handle these kinds of requests on behalf of Reid Hoffman. Unfortunately, Reid is not going to be able to participate. Reid's schedule is incredibly tight and unfortunately this means we often have to respectfully decline wonderful opportunities such as this. Thank you for thinking of him, and best of luck.

Begin forwarded message:

From: Ryan Robinson <ryan@ryrob.com>
Sent: Tuesday, September 12, 2017 11:10 AM
To: Reid Hoffman
Subject: Feature in 100k attendee summit?

Hey Reid,

I've been loving the podcast—you have an incredible team and it's great getting to hear so much more of the behind-the-scenes action going on.

I wanted to run an idea by you to see if it's up your alley.

Steli Efti at Close.io and I are putting together a big online sales summit (*expecting 100k+ attendees*) and I'd love to grab a 20min interview with you to feature in the summit. We'll be pushing it out hard, lining up coverage on all of the major publications, and the event is going to be 100% free forever.

Sound like something that'd be a good fit for you?

Ryan

Tony Robbins also had a pretty packed schedule…



Ryan Robinson <ryan@ryrob.com> Sep 12 (2 days ago)
to Ana

Hey Ana,

Hope you're doing well! I wanted to run an idea by you and see if it's up Tony's alley.

Steli Efti at Close.io and I are putting together a big online sales summit (*expecting ~100k attendees*) and I'd love to grab a 25-30min interview with Tony to feature if this is a good fit for him. The summit's going to be 100% free forever and we'll be pushing it out hard, lining up coverage on all of the major pubs.

Sound like something that'd be a fit for Tony?

Ryan

Ryan Robinson
ryan@ryrob.com
559.707.3950

Twitter | ryrob.com | LinkedIn | Content Marketing

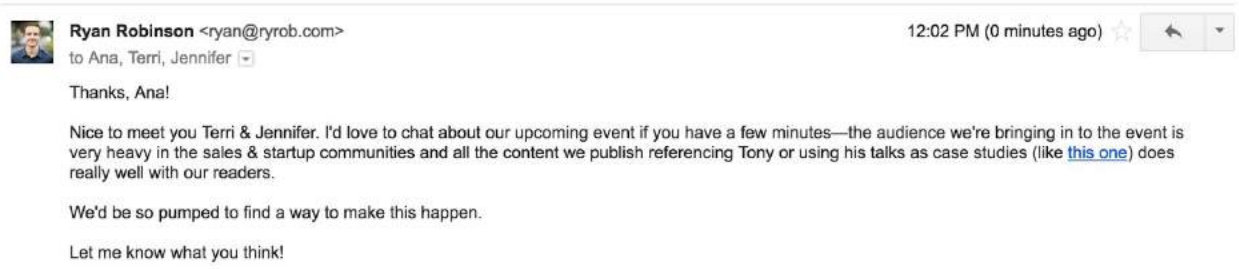
Ana Yoerg 11:51 AM (3 minutes ago)
to Terri, Jennifer, me

Hi Ryan,

Tony's schedule is pretty booked, but I am copying his publicist here in case it is of interest to schedule an interview.

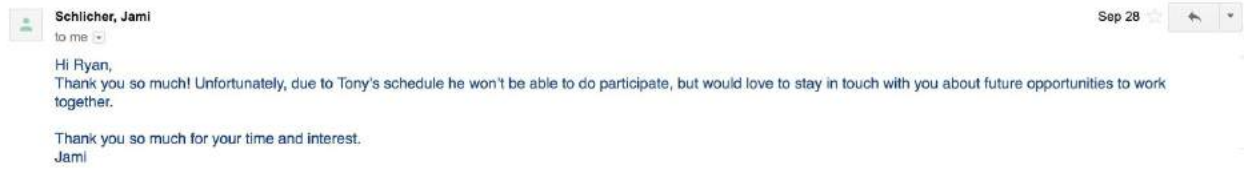
Best,
Ana

But the answer from his team wasn't a definitive no—and we don't live in the maybe zone.



That led me to another phone call with a couple people from Tony's communication team that went similarly to the one with Herjavec's team—there was definitely interest and excitement.

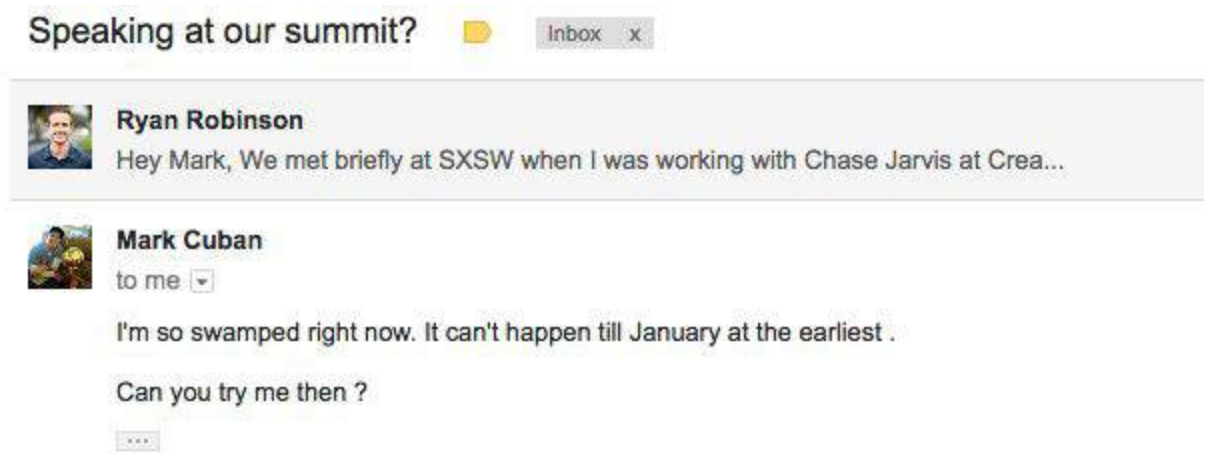
Yet at the end of the day, scheduling was looking to be very difficult and we didn't have a budget to help prioritize our interview into their ultra-busy schedules.



And the outreach continued.

Still tackling our biggest prospects from the dream list, I was at least getting a lot of replies, which felt better than requests going unanswered.

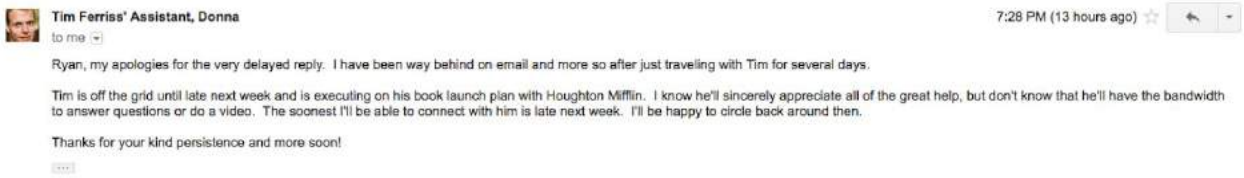
Mark Cuban was out *for this round*, but up for something in the new year.



Same with Gary Vaynerchuk…



And Tim Ferriss was also out, via his awesome assistant, Donna…



After 3-4 weeks of ongoing outreach emails and phone calls, I hit the bottom of our dream list and moved on to focus more effort on booking the speakers who were in our realistic stretch goal and high-confidence categories, so that we could keep pushing forward with the summit.

All along, I was scheduling and conducting our first interviews (yes, it was an insane couple of months).

6. Scheduling, recording and editing interviews

Some of the speakers we reached out to were instantly into the idea of being in the summit.

Those ones were often easiest to schedule time with, too. Once we got a confirmation, I'd always offer up my calendly link for them to quickly book a time slot for our call—which meant interviews started happening right away.

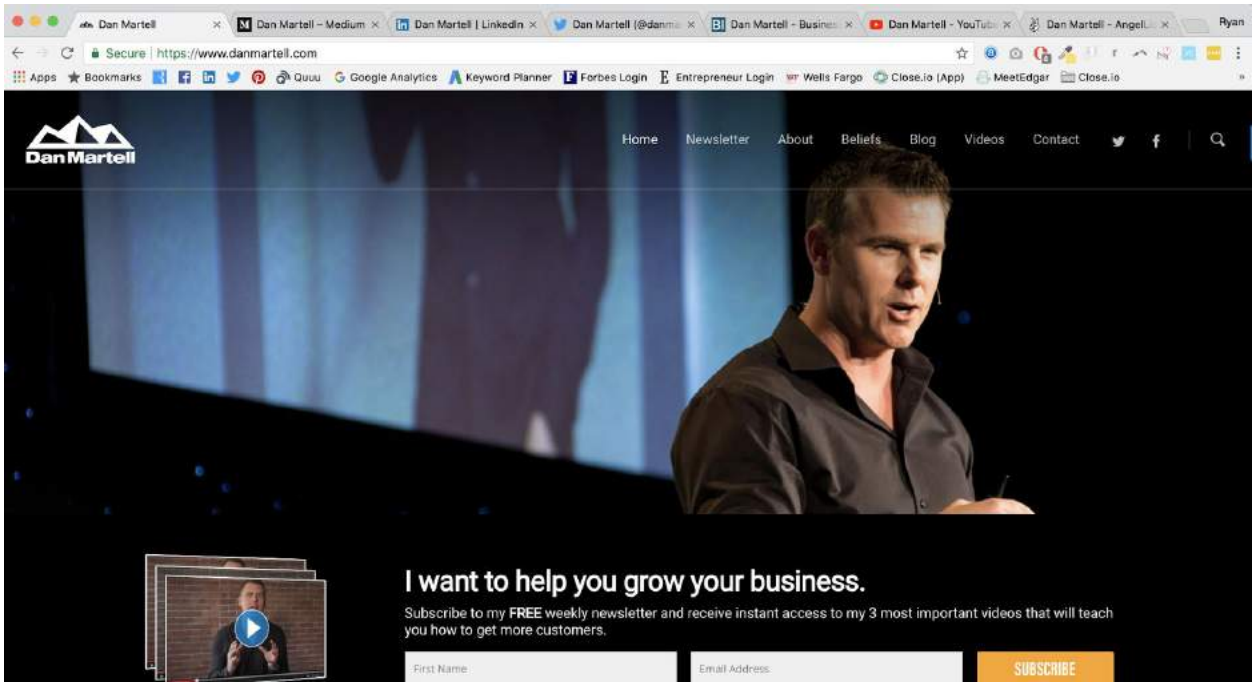
Just a few days after sending out our speaker invitations, I recorded our first interview for the summit on September 14th with serial startup founder, angel investor and sales pro, Dan Martell.



Interviewing Dan was a blast because he's so high energy, the conversation flowed naturally and it gave me an opportunity to really hone in on the general questions I'd been planning on asking most of our speakers during their interviews.

Because of the high volume of interviews I was personally doing for the virtual summit, I knew I wouldn't have all the time in the world to research my guests (like I usually do on my podcast), so I made the call to block off 30 minutes ahead of each interview to research.

Here's a screenshot of my interview research before chatting with Dan:



Done almost entirely online in half an hour (one hour at best) leading up to most of the actual interviews, here's how I prepared myself ahead of each conversation:

- Explore the speaker's website to get a handle on the background, experience, accomplishments, style of communication and sign up for their email list
- Head over to their blog (or Medium page) to see what they're writing about and/or working on right now
- Check them out on LinkedIn, Twitter, Angel List and YouTube to get an even better feel for their interaction style, see what they like sharing and talking about

When I was coming up with my list of interview questions, I knew they'd be customized a bit for each speaker ahead of time, and I always allowed for space to naturally chase interesting topics & ideas our interviewees would bring up within the conversations.

Throughout the entire interview process, I regularly consulted with Steli and other members of the Close.io team to land on interesting questions for each speaker, too.

In general though, here are the standard interview questions I'd have in mind.

- When you need to build or revamp a sales process, where do you start?
- What (if anything) has changed in recent years, in terms of how companies are building successful and scalable sales teams?
- What do you feel is the biggest hurdle most sales teams are working against?
- What's the most important (or interesting) deal you've ever been a part of closing? What was the main sales strategy you felt was at work in closing that deal?
- What's an example of an impressive sales organization you know today and what makes them so successful?
- What (if anything in particular) have you found to be the most important trait or quality in a potential sales hire? How do you test for that in the interview process?
- What do you feel is the biggest challenge a salesperson is facing today?
- Does anyone stick out in your mind as being a particularly impressive salesperson?
- What's the best investment you've ever made in the context of building your selling skills?

After doing a few of these interviews, I started to get into a groove.

Conversations began flowing more naturally. I stopped worrying so much about making sure I asked questions *exactly* how I'd written them down. We spent more time following the direction the interviews were naturally progressing in, rather than redirect towards the script of questions I had sitting in front of me.

The last half of our interviews turned into the most interesting conversations because I was getting better at interviewing—a skill that definitely takes time to build.

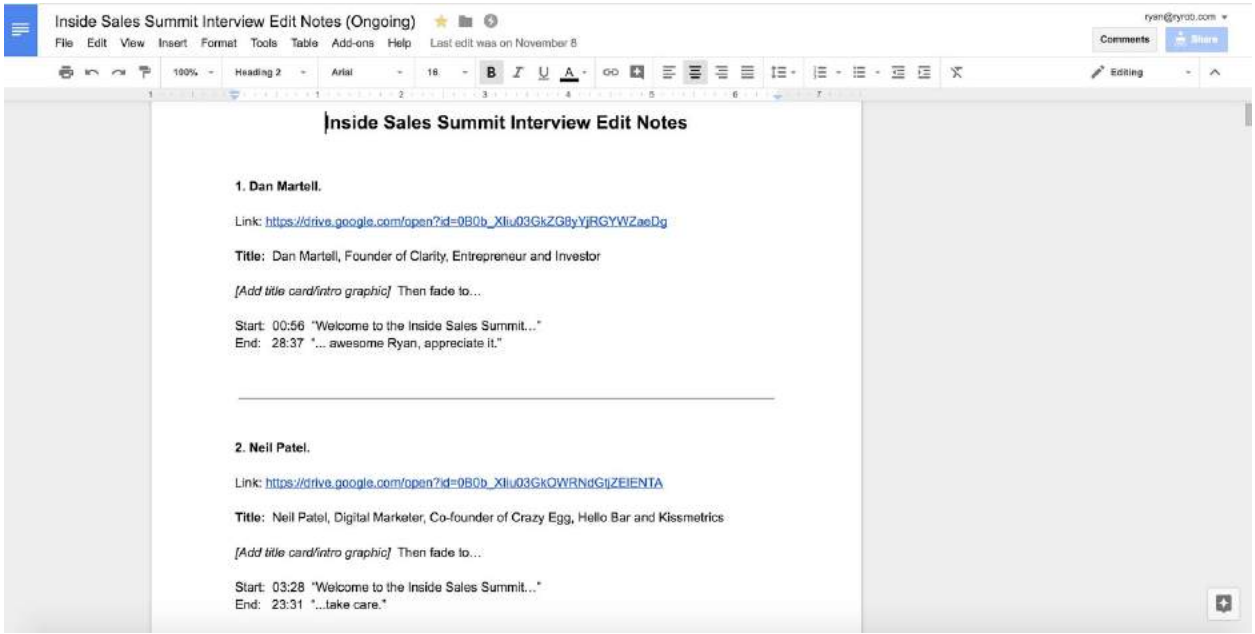
Remember, as you start compiling your interview questions to always keep your audience in mind so that you're exploring topics they'll actually be interested in.

Editing the raw interview footage

After recording a new interview, I'd upload the file to a shared Google Drive folder, both to make it easier for our editor to quickly download them, and to immediate send a copy of the interview up into the cloud for safekeeping in the event my computer crashes.

Next, I'd immediately take note of any sections we'd need to cut, make edits to, or re-record sections of, while the interview was still fresh in my mind. I always blocked off 15 minutes on my calendar immediately following an interview to do this, because it's so important.

Our editor, Vladan, had access to a shared Google Doc where I'd add in my edit notes, timestamps for when the recording should start & end, and give him links to download out the footage. Here's a snapshot of that:



Within the next 24 hours or so, I'd get back a final cut of each interview from our editor with a fresh intro graphic and title card in-place. Like so:



I'd do a quick scan of the video watching at 2x speed and zooming in to any sections where we made edits to verify they got cut properly, and with the vast majority we were ready to go without any additional rounds of editing.

7. Building your website and content pages

The goal of your virtual summit website is simple—to capture as many signups for the summit as possible, and then effectively deliver your content to that audience in a way that meets their expectations.

Pause! Examine your resources and capabilities before starting

Before scheduling an urgent meeting with your company's development team or rushing to hire an external freelance web developer to magically build your website, it's important to take stock of your own resources and capabilities.

For our virtual summit, a critical part of my pitch for even creating this event in the first place was that I'd be personally building the website (without the need to tap into Close.io developer resources). Because I've been building Wordpress-powered websites for my own side projects over the past ten years, I was confident I could pull something together with limited help from a couple of developer friends.

But, you may not be in the same position. To take inventory of your own resources, capabilities and determine the best course of action for getting your summit website built, ask yourself questions like:

- Do I have the technical ability to build the website entirely myself? If so, do I actually have the time?
- Do we have developer(s) on my team or in my company that could build the website? Do they have the bandwidth based on our timeline to launch date, or will we need to outsource to external help?
- Do we have budget to hire help for building the website? If not, is there a person or company we might be able to partner with in exchange for them taking on the majority of building the website?
- Will I need help with creating the graphics that'll be featured on the website? If so, determine whether or not that can be handled internally, or if you'll need to find outside help to pitch in.

Once you've sorted out your best path to getting your website built, let's cover some of the basics that your virtual summit homepage will need to include.

7 key elements your virtual summit homepage needs to include

Even if the eventual goal for your virtual summit is to sell on-demand access to the content after the initial "live" period ends, to launch another paid product during the event, or otherwise, you'll still need to start with converting your site visitors into signups.

What does that mean? Your virtual summit homepage (and any partner or speaker landing pages) need to be conversion-optimized for getting email subscribers.

Anyone who comes to your summit homepage is a potential attendee (subscriber) for your event, and when those visitors leave your summit signup page because it somehow doesn't meet their expectations, that's a missed opportunity.

Here's a screenshot of our homepage for the Inside Sales Summit, where you can see that the clear goal is getting visitors to sign up to attend, right up top *above the fold*.



Your virtual summit homepage should have these important elements.

1. Headline

We start the homepage out with an attention-grabbing headline that's clearly articulating what you'll get out of attending the summit in one sentence—*learn inside sales from 50+ top sales leaders, executives, bestselling authors and entrepreneurs*. Your headline should be concise, yet descriptive enough to tell visitors exactly what the event is.

2. Credibility-boosting hero image

Immediately below the headline, we have a side-by-side section that highlights a hero image featuring a dozen of our most recognizable speakers participating in the summit. Since we were primarily marketing our summit to sales reps and managers, we wanted to visually capture their attention with head shots from sales leaders they're already familiar with.

Next to the hero image is a short paragraph of text that offers more details about the people & companies participating in the summit—again with the goal of making the event sound more credible. We also cover the topics they'll be talking about and the dates for the event.

3. Call-to-action

Finally, there's an ultra-clear call-to-action that asks visitors to sign up for *100% free* access to the summit when it launches—complete with an easy email subscribe box that's connected to our email service provider.

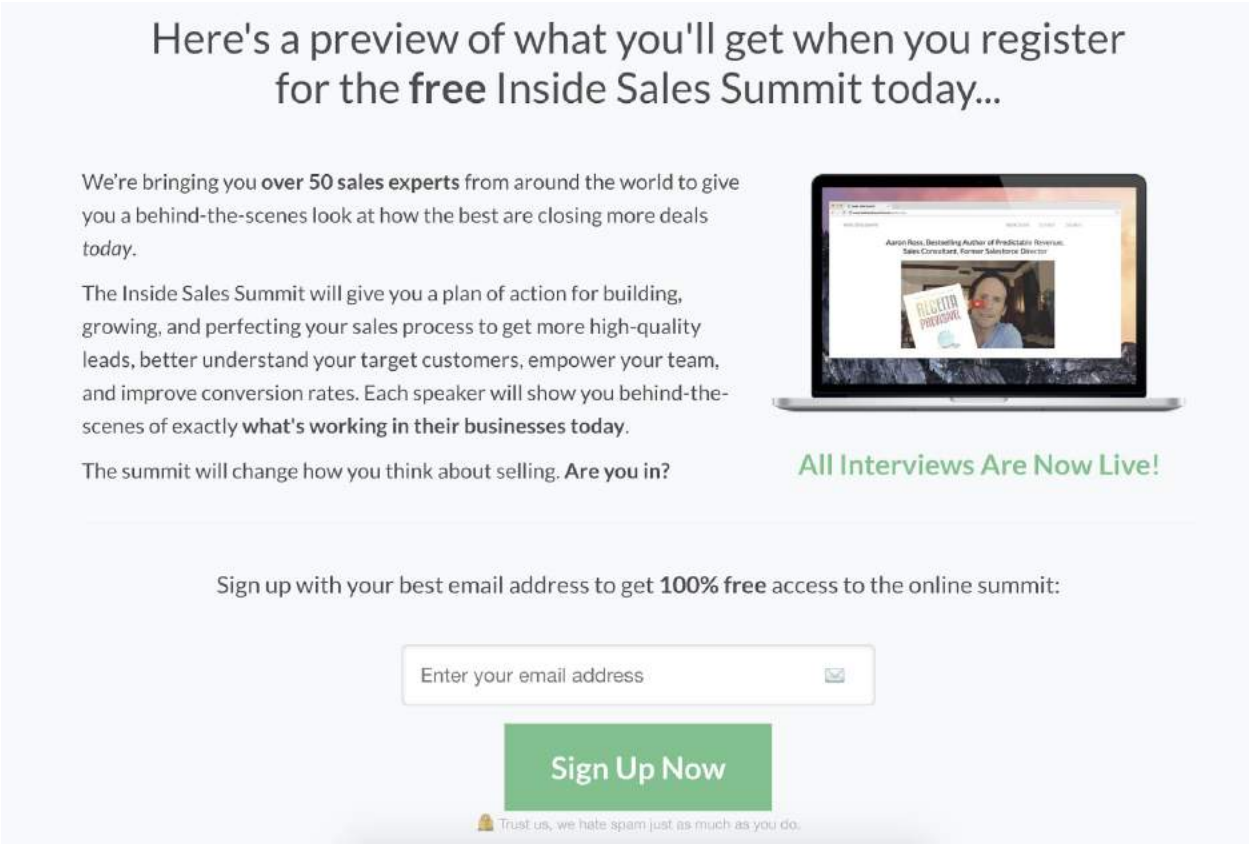
Once visitors subscribed to get access to the summit, they were taken to a simple thank you page that reiterated the launch date and gave expectations around when they'd get an email from us. We placed duplicates of this same call-to-action in multiple places throughout the homepage, and saw that visitors subscribed at different points across the page, depending upon what resonated with them most.

4. "Featured in" image block



You need to get your visitors excited about attending your summit! So, just below the first call-to-action on our homepage, we wanted to highlight how credible our speakers were. We pulled together a collage highlighting logos from the most recognizable business publications, sales blogs and startup communities our speakers have been featured in.

5. Preview the content



In order to make our virtual summit feel more real (before it had actually started coming together), we wanted to feature an example of what it'd look like for attendees who showed up to watch our interviews.

So, we did a quick mockup in Photoshop, overlaid the image on a computer, and placed it side-by-side with a more in-depth description selling visitors on why they should sign up. Then of course, we immediately gave them another call-to-action to do just that.

6. The nitty-gritty details



Like it or not, some people are going to want to know *exactly* what's going to be covered in your virtual summit—sometimes even before you really know (if you're leaning heavily on guest interviews to fill up your content schedule).

7. Your speakers

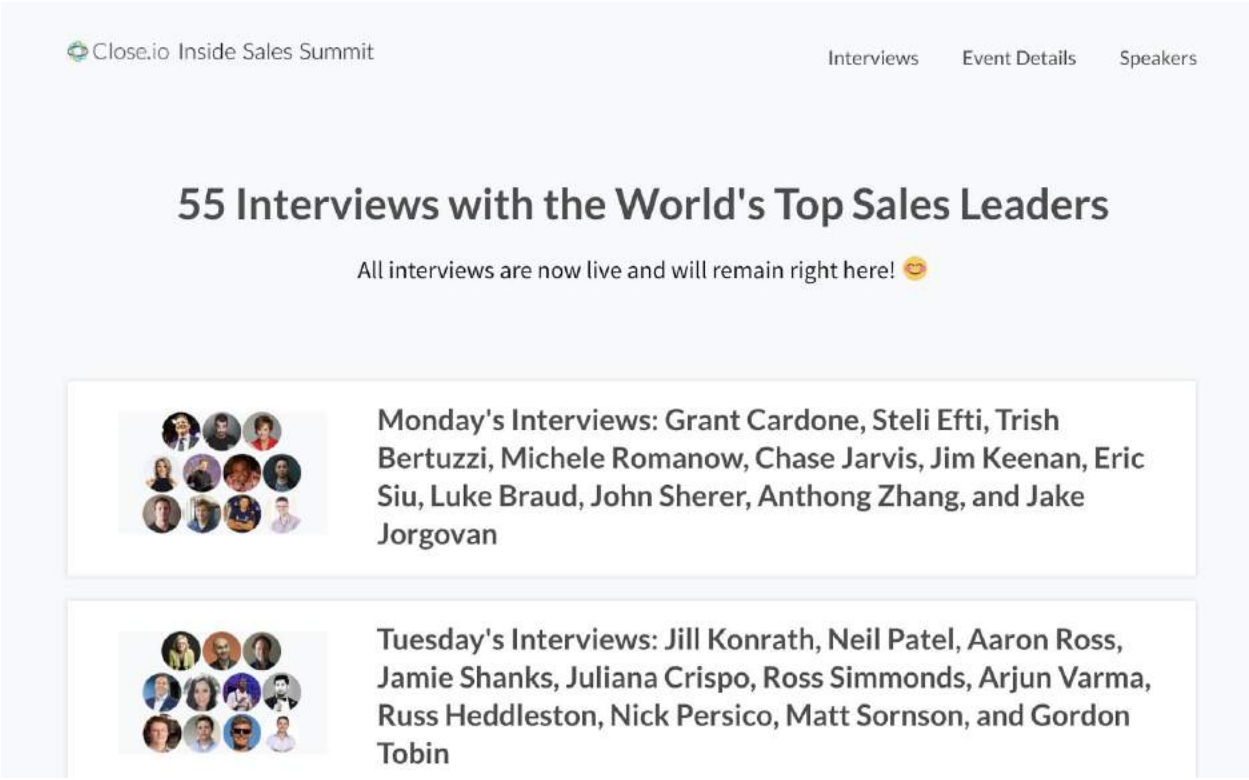


Last but certainly not least, we highlighted a head shot of every single speaker that was participating at the summit, including a one-line bio about them. Not only is this a branding opportunity for you and your virtual summit, but it's also another event for your guests to say they're speaking at—which also boosts their own credibility. This section is a win-win.

Finally, at the very end of our homepage, we included one last call-to-action for visitors to sign up. And for most people that made it all the way to the bottom of the page, they joined.

Delivering your virtual summit content

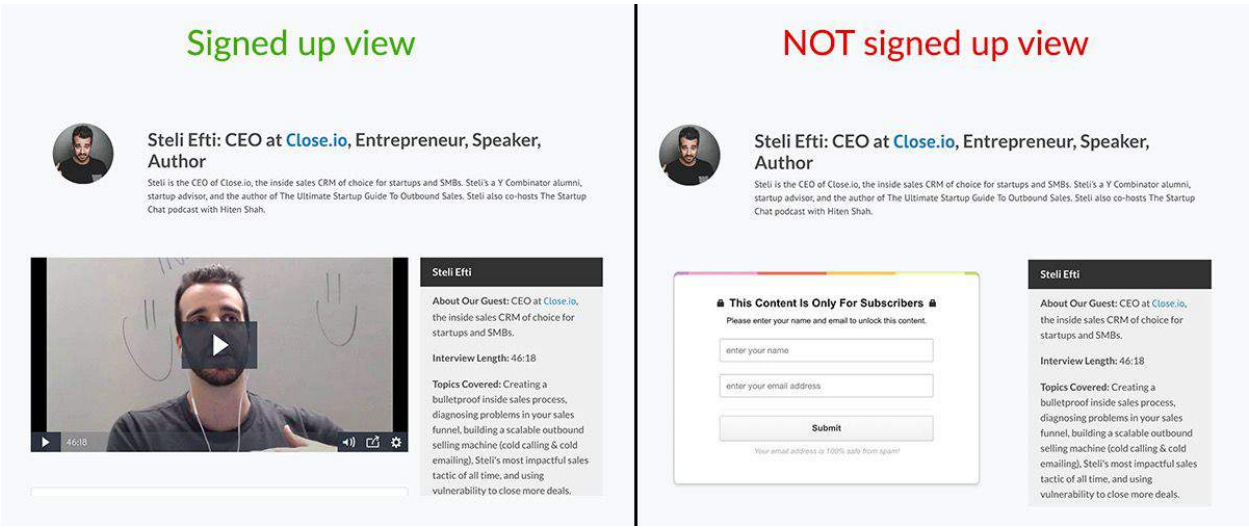
Once our summit went live (if you're a registered attendee), you'd be able to access our interview directory page—which is the URL we linked to in our launch emails.



From here, depending on which day of the week it was, you'd be able to navigate to the interviews that were live and available for consumption.

For our summit, we chose to create individual pages for each speaker, so that we could customize the content of the page exactly for them and make them feel great about choosing to participate in our event.

When attendees navigated to one of the individual speaker pages, they'd see this layout—with a gated content box placed over the embedded video if the visitor hadn't previously registered for the summit.



(We placed a simple cookie on the thank you page that everyone hit after subscribing to join the summit, so that their browsers would remember our website and the gated content box would automatically disappear for them).

8. Creating a virtual summit promotion plan (that achieves your goals)

Like it or not, the success of your virtual summit is determined long before launch.

From our conversations with other virtual summit hosts before working on ours, we knew this was something that'd hold true going into this adventure. Even still, it was a hell of a reality check seeing just how much work it took to get partners and speakers on board—let alone getting them to share the event with their email lists & social followings.

Our biggest takeaway on promotion is this: **You need to have at least one person dedicated to your summit promotion efforts, while another oversees the logistics and creation process**.

The context switching alone proved to be pretty challenging—hopping off of two or three summit interviews in a row, moving straight into writing partner email copy, creating graphics a social team is asking for, and checking in on the dates our key partners are sending promotional emails to their audience. It's *a lot* for one person to juggle.

The reality is that the promotional success of your virtual summit, like with any well thought-out content marketing strategy, is largely decided during the process of *who* you choose to have participating in your summit in the first place.

Everything matters. From the topic you choose for your virtual summit, to the caliber of speakers you book, promotional partners who agree to email their audience and cover the event.

These are the seemingly small decisions that snowball into large downstream effects on the success (or failure) of your summit. Now, let's talk about what we did to promote our summit and what we're doing differently next time.

Our virtual summit promotion plan

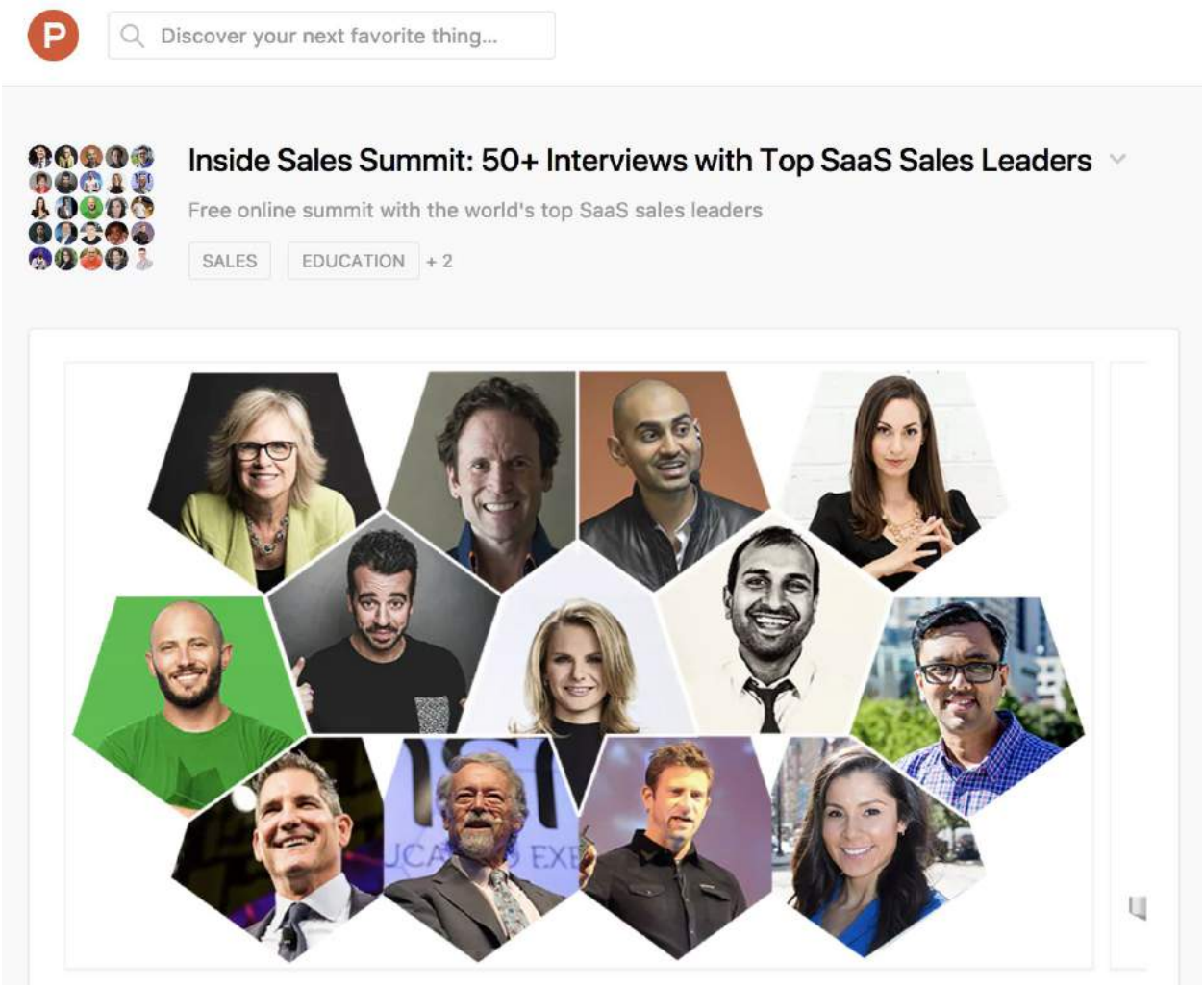
Well, take a look for yourself…

Here's the exact promotion plan we put together, with the highlights, results and improvements we're making for the next round of the virtual summit below.

But first, it's important to note that after we locked arms on this promotion plan, I popped over to Asana to add relevant tasks, to-do's and set deadlines for myself (and others) to make sure we stayed on track with lining up all of these moving parts.

Producthunt launch

In our experience with Producthunt, we typically see anywhere from 150 - 500 upvotes on the projects we launch—and when someone with a high reputation on the platform does the "hunting" on our behalf, that usually gives us more traction.



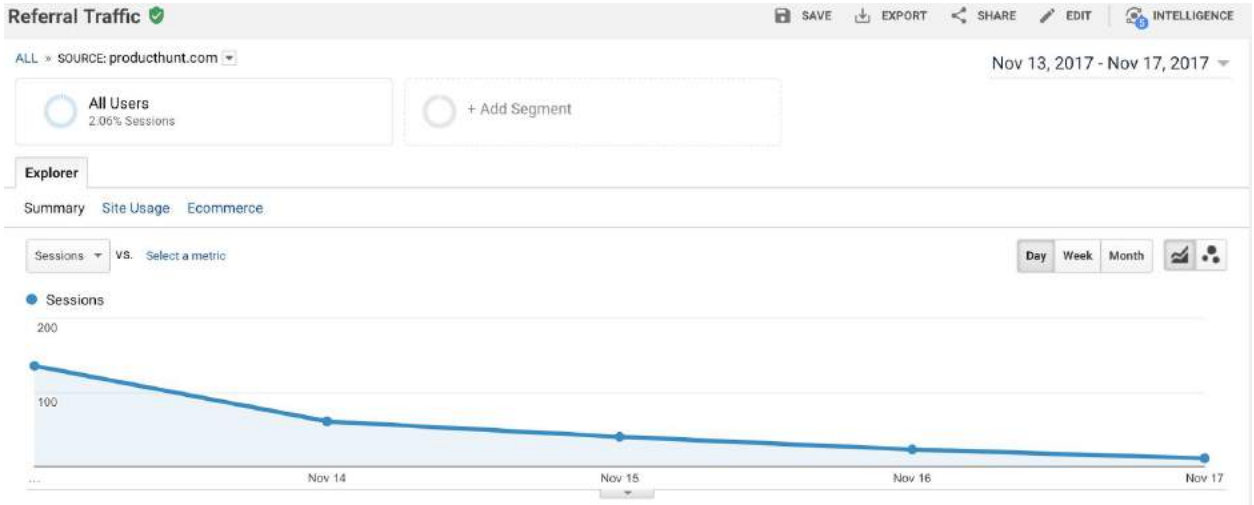
So, we naturally reached out to Hiten Shah, Steli's co-host on The Startup Chat podcast, as he's one of the most active members of the Producthunt community and he said he'd gladly share it for us.

Just about everything Hiten "hunts" gets a substantial number of upvotes—and thus climbs the rankings for the day (giving us more click-throughs to the summit landing page), so this was an easy win.

All we needed to do was arm Hiten with the right images, headline, tagline and copy to use, then ask him to schedule the launch to go live at midnight on the morning of the summit's first day to maximize signups early in the week.

Results from the Producthunt were less than expected. We ended up seeing a total of **157 upvotes** on the product page, which is on the lower end of what we expected.

The bigger surprise was that we only saw **271 unique sessions** attributed to Producthunt driving users to the virtual summit landing page—way lower than anticipated.



These results suggests that we probably had a bit of an audience miss when it comes to interest areas, which shouldn't be a surprise as the Producthunt community is more heavily concentrated with makers & product people, than it is with salespeople.

Partner (and speaker) emails

Partner and speaker emails were by far our most effective channel for acquiring summit signups.

For context, here's a snapshot of our traffic sources to the summit homepage during the *live week*—where you'll see email driving at least 26.94% of visitors—but that's actually a little misleading since **email actually drove more like 85% of visitors**…

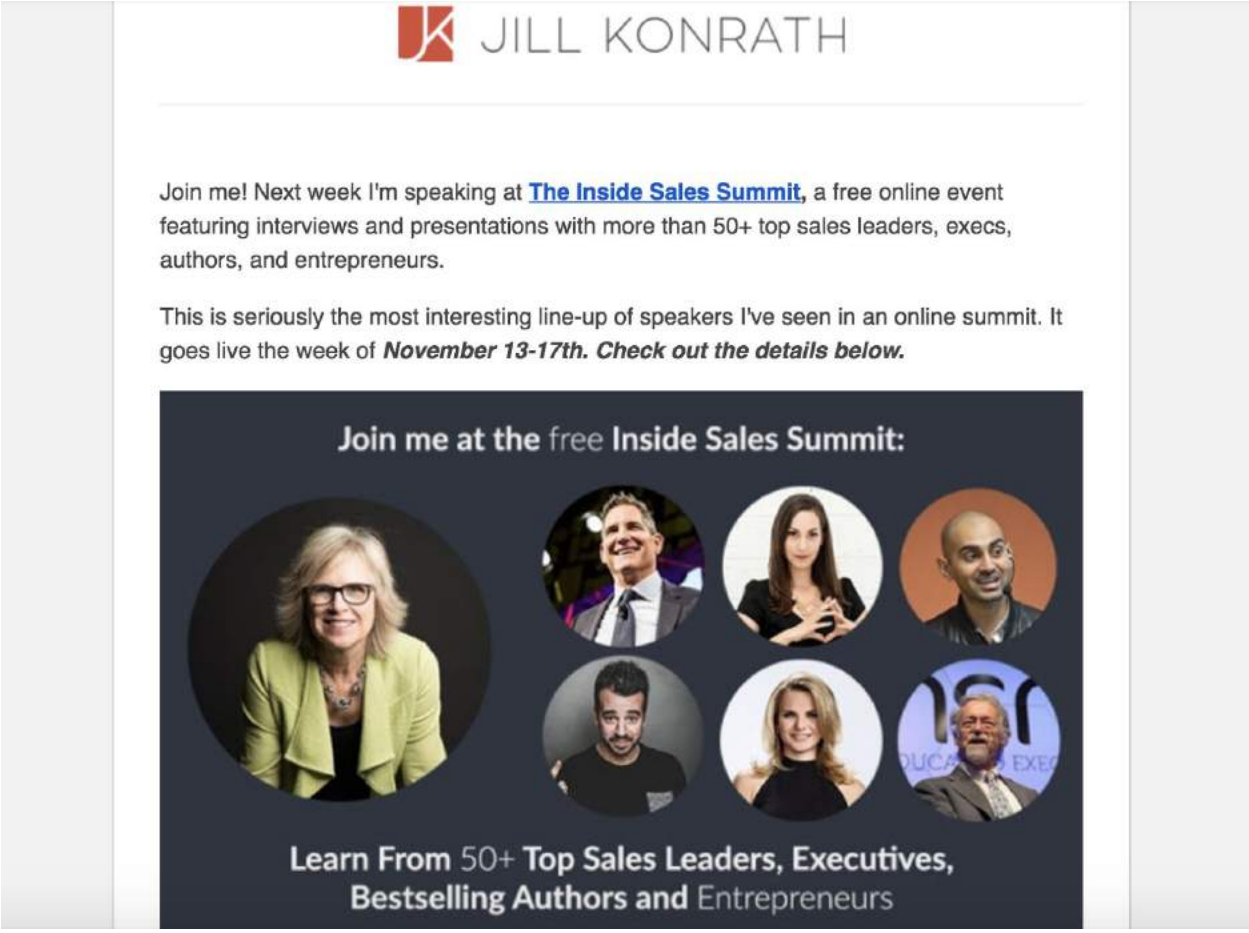
	Medium	Acquisition			Behavior			Conversions		
		Sessions	% New Sessions	New Users	Bounce Rate	Pages / Session	Avg. Session Duration	Goal Conversion Rate	Goal Completions	Goal Value
		13,138 % of Total: 100.00% (13,138)	61.94% Avg for View: 61.91% (0.05%)	8,138 % of Total: 100.05% (8,134)	51.16% Avg for View: 51.16% (0.00%)	2.77 Avg for View: 2.77 (0.00%)	00:02:57 Avg for View: 00:02:57 (0.00%)	0.00% Avg for View: 0.00% (0.00%)	0 % of Total: 0.00% (0)	$0.00 % of Total: 0.00% ($0.00)
1.	referral	6,359 (48.40%)	69.13%	4,396 (54.02%)	54.03%	2.59	00:02:10	0.00%	0 (0.00%)	$0.00 (0.00%)
2.	email	3,539 (26.94%)	37.61%	1,331 (16.36%)	46.37%	3.01	00:04:23	0.00%	0 (0.00%)	$0.00 (0.00%)
3.	(none)	3,025 (23.02%)	75.64%	2,288 (28.12%)	49.98%	2.86	00:02:53	0.00%	0 (0.00%)	$0.00 (0.00%)
4.	organic	112 (0.85%)	46.43%	52 (0.64%)	58.93%	2.63	00:03:12	0.00%	0 (0.00%)	$0.00 (0.00%)
5.	(not set)	63 (0.48%)	66.67%	42 (0.52%)	55.56%	3.44	00:04:21	0.00%	0 (0.00%)	$0.00 (0.00%)
6.	social	40 (0.30%)	72.50%	29 (0.36%)	77.50%	2.52	00:05:05	0.00%	0 (0.00%)	$0.00 (0.00%)

You'll see that email ranks as the second highest traffic source, at **3,539 unique sessions** that can be directly attributed to email.

However, digging a little deeper into our Google Analytics, it becomes clear that the vast majority of the traffic attributed to *referrals* (~80% of it) and almost all of the traffic attributed to the label *none* were also from speaker and partner emails.

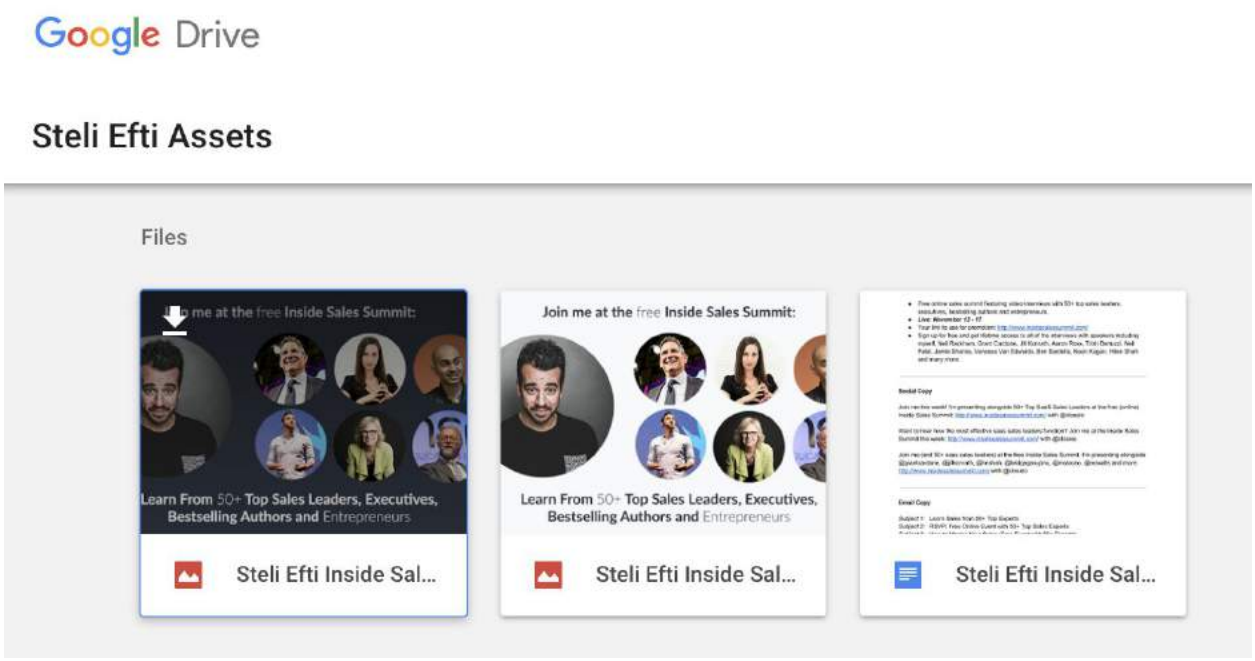
So, email drove more like **11,200 unique sessions** for us during just the live week.

When we talk about partner and speaker email that drove in traffic and signups, we're talking about emails like this one from Jill Konrath, that she sent to her entire list (with subscriber numbers in the six figures):



To make it as easy as possible for our speakers and partner brands to commit to sending a dedicated email (or ideally two), we put together promotion folders like this

one—complete with custom graphics featuring the speaker, pre-written copy to use on Twitter, Facebook, LinkedIn, and a custom-written email template to use—for *every speaker and partner* that agreed to promote the summit.



Yes, this was a lot of work. But it helped get more emails out, and drive in more signups.

Incentivization: In exchange for emailing their lists about their summit appearance, we offered to do a 1-to-1 list share with each of the speakers and partners after the summit concluded, a common practice with hosting joint-webinars.

So, if you emailed your subscribers and drove in 100 signups (through your unique tracking link), then once the summit was over, we'd send you a new list of 100 subscribers that signed up for the summit—and didn't originally come from your list.

Because email was so effective compared to our other promotion efforts, we're doubling down on getting more partners with sizable (relevant) lists, and asking them to send 2-3 dedicated emails to their subscribers in exchange for the 1-to-1 list sharing exchange.

And on top of just the speaker and partner emails, we were sending several emails to our own Close.io email list of blog subscribers, trial users and customers to come tune in to the summit—not surprisingly, we ended up being the largest contributor to signups.

Partner (and speaker) social

While social didn't drive a significant amount of traffic (or signups) for the summit at the end of the day, having our speakers and partner brands share about their participation on their social channels did create a good amount of buzz during the first half of our live week.

Here are a few of those shares from Twitter, where you'll see many of the speakers and brands used the pre-written copy we sent over as a starting point (which made it easier for them to take the time to share).







Now, let's talk about content.

Content promotion

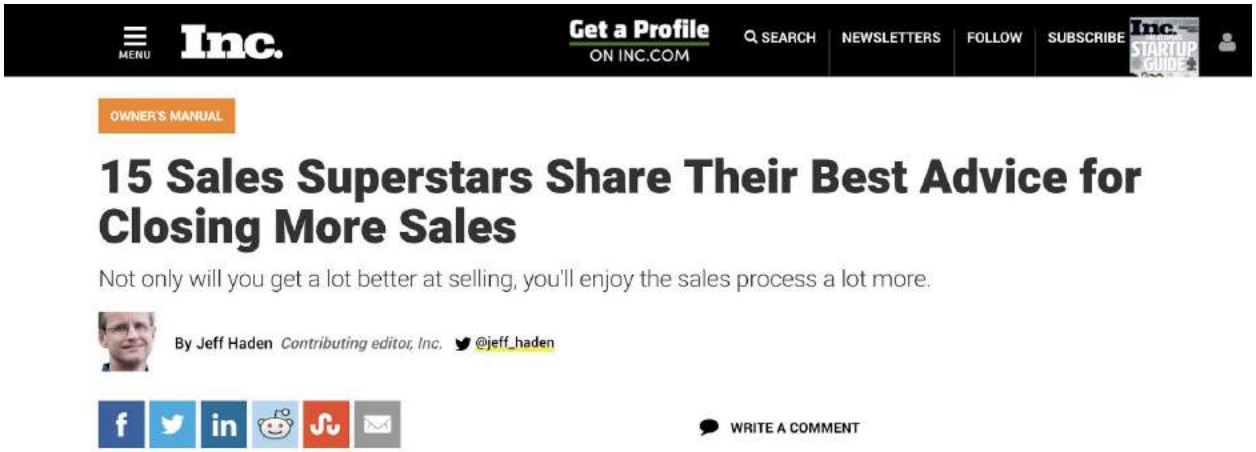
Leading up to the launch of the summit, I'd already started writing and preparing multiple blog posts like [this one sharing sales advice] and other lessons learned from speakers in the summit.



The goal of this content was to give us something we could publish on the Close.io blog (and pitch to external sales blogs & publications) and ask the featured speakers to share with their social audiences—driving in more traffic that may want to attend the summit.

Plus, we could use these posts as a great reason to send an extra email or two promoting the summit the week before it launched.

After publishing this first post to our blog and boosting it for a few bucks on Facebook, I reached out to my editor friend at Inc Magazine and asked if it'd be a good fit to syndicate over to his column. The next day, it went live on Inc and drove in a couple hundred visits to the blog and summit landing page.



I wanted to do 10x of these, but that didn't work out the way I'd planned.

As you'll see in our original promotion plan, I had lofty ambitions of pitching unique articles like this to all of my editors at Forbes, Entrepreneur, Business Insider, and sending shorter-form articles to all of our partners with blogs who'd agreed to publish & promote.

However, I drastically underestimated how much time I'd spend just equipping and staying in close contact with our partners who were promoting the summit via email—which we already knew would be our most predictable acquisition channel if we gave it priority.

9. Launching and boosting engagement

During the week leading up to launch, all of our attention was focused on making sure our speakers and partners had everything they needed to get their promotional emails sent out.

We'd already armed everyone with the email copy, graphics, and suggested social snippets, so one-by-one, I checked in with all of our partners like Max, Gaetano, and Alicia from SalesHacker who were doing a dedicated send to their list.



Gaetano DiNardi [redacted] 11/1/17
to Alicia, me

Thanks Alicia!

Ryan Robinson <ryan@ryrob.com> 11/15/17
to Gaetano, Alicia

Hey you two!

Tomorrow's the big day :)

Need anything else from me ahead of the email send?

Max's interview will be going live at 6am ET tomorrow and it'll be off to the races. I'll update you with the link as soon as it's up.

Alicia Crisp [redacted] 11/15/17
to me, Gaetano

Hi Ryan,

We're all set!

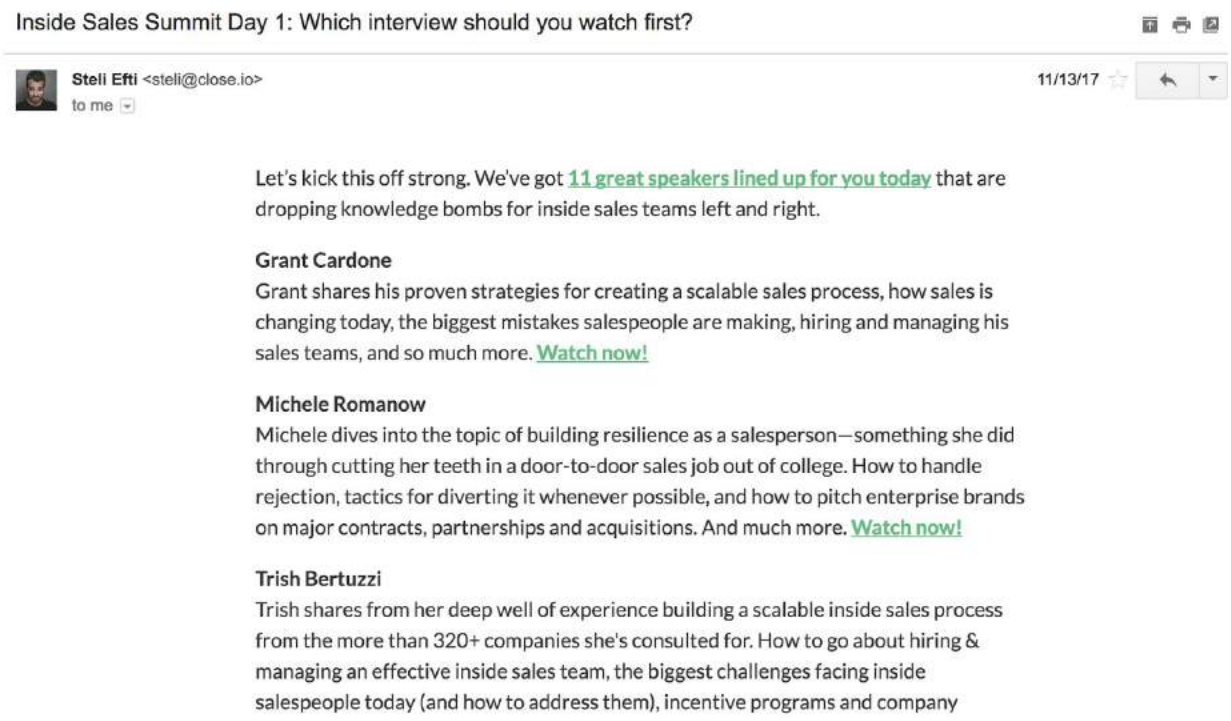
Thanks for the update on Max's interview. I'll keep a lookout for the link tomorrow.

Thanks,
Alicia

I kept this up throughout the live week too, checking in to make sure everyone was still on schedule and had everything they needed. All with the goal of making sure our email partners would still be able to send *during* the live week of the virtual summit when there'd be the most buzz around the sessions—encouraging more signups from the people who hit the landing page and saw the event was still going on live.

While our partners queued up their email campaigns, so did we.

Here's the email that went out from Steli to our Close.io email list on the first day of the summit.



Inside Sales Summit Day 1: Which interview should you watch first?

Steli Efti <steli@close.io>
to me

11/13/17

Let's kick this off strong. We've got **11 great speakers lined up for you today** that are dropping knowledge bombs for inside sales teams left and right.

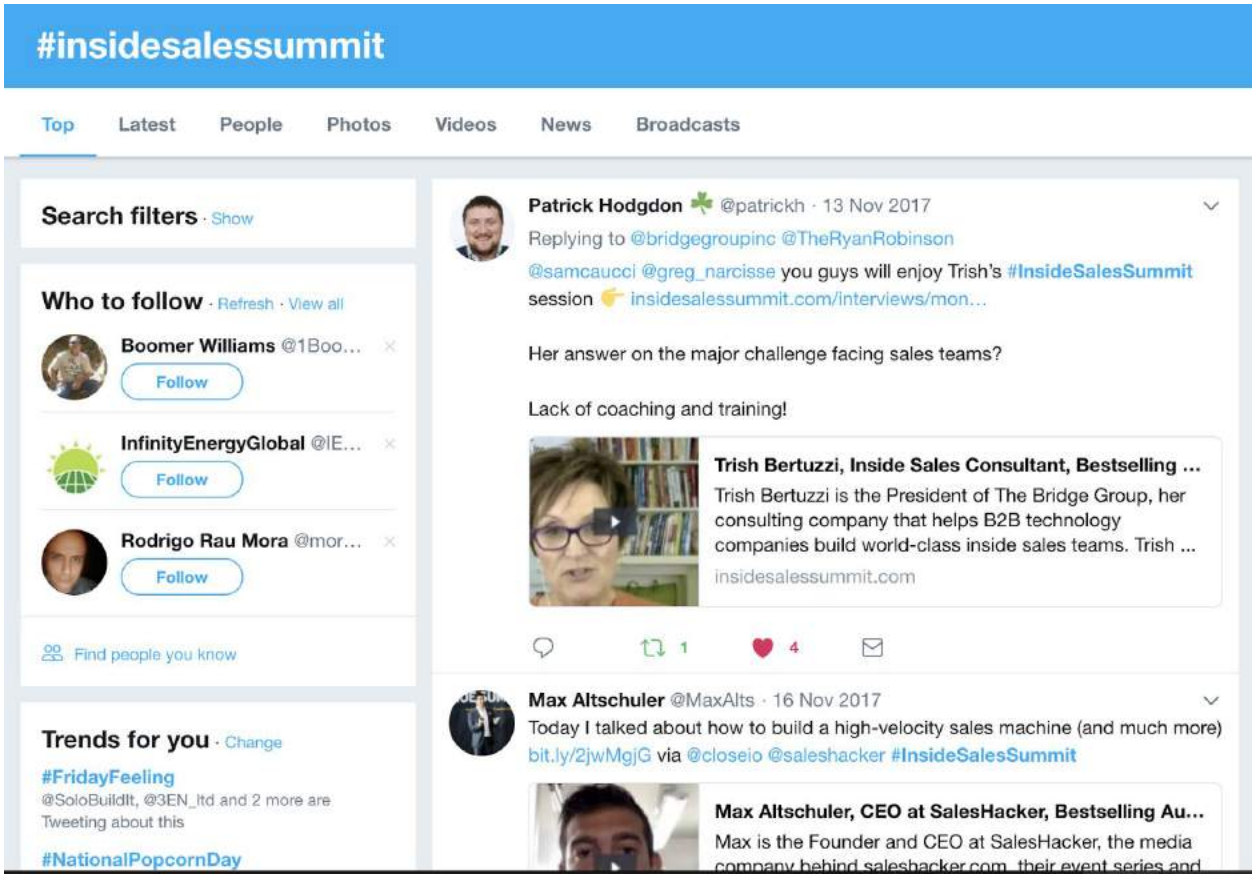
Grant Cardone
Grant shares his proven strategies for creating a scalable sales process, how sales is changing today, the biggest mistakes salespeople are making, hiring and managing his sales teams, and so much more. **Watch now!**

Michele Romanow
Michele dives into the topic of building resilience as a salesperson—something she did through cutting her teeth in a door-to-door sales job out of college. How to handle rejection, tactics for diverting it whenever possible, and how to pitch enterprise brands on major contracts, partnerships and acquisitions. And much more. **Watch now!**

Trish Bertuzzi
Trish shares from her deep well of experience building a scalable inside sales process from the more than 320+ companies she's consulted for. How to go about hiring & managing an effective inside sales team, the biggest challenges facing inside salespeople today (and how to address them), incentive programs and company

We launched similar emails every morning of the summit, directing our blog subscribers and everyone who'd registered for the summit up to that point—to the day's interview schedule (landing page) where they'd be able to immediately jump back into watching.

Throughout the week, we noticed that our hashtag for the virtual summit, *#InsideSalesSummit* started to pick up some momentum on Twitter, too.



To keep the conversations going with the people who were watching (and sharing) our summit interviews, I dedicated a few minutes every couple hours to hop over to Twitter and drive the discussion around what people had to say.

Aside from keeping the emails and social sharing going with our partners, I was still spending a few hours each day creating the individual site pages for the next day's interviews where the videos would be hosted (so people could watch them on-site).

Unfortunately, that didn't leave much time for reaching out to publications, or writing up articles for my columns to generate more press for the summit.

Final thoughts on creating a virtual summit (and what's coming next)

For round two of the Inside Sales Summit (*coming in April 2018*), the company-wide consensus is that we need to **divide and conquer** when it comes to splitting up creation and promotion of the summit.

That conclusion comes from reflecting on everything we've learned from this first round.

Here's a recap on why we didn't hit our 25,000 subscriber goal with this summit.

1. The person in charge of creating was also doing the promoting. Creating the summit was a team effort that couldn't have been pulled off without multiple stakeholders, but in hindsight, I personally produced way too much of the summit myself. I did about 90% of the speaker outreach, schedule coordination, rehearsals in advance, and all 55 interviews in just 8 weeks. I built the website, wrote the copy for landing pages, created the speaker promotion materials, made the graphics, managed the video editor, forged the partnerships, and wrote blog posts promoting the event. In short, I got too caught up in creation activities and didn't spend nearly as much time on managing partners & promoting the summit the way I would've wanted to.

2. We set our subscriber goal before actually confirming partnerships and tallying up our full email list exposure. This is a classic mistake that I'm pissed at myself for making, because I know better than trying to count all of my ducks before they're even in the room. Because we didn't want to spend money on paid acquisition for our first virtual summit, we planned to almost solely rely on driving signups from partners and speakers promoting the event to their email lists and social audiences—in exchange for a list share program.

3. Partner mix-ups and cancellations. Another key takeaway from our first round with this virtual summit is just how much time and effort should go into managing these partner relationships. It's important to set extremely clear expectations, providing them with easy copy/paste assets they need to promote, and making sure they're really in a good position to promote the event—not just *tentatively* commiting and hoping to find time on their marketing calendar somewhere. We ended up having one major partner drop out right before the launch of the summit due to unforeseen circumstances on their end, so that's difficult to account for. But in other cases, we had partners send email promotions to small segments of their audience instead of their full lists, and some that didn't send out dedicated emails promoting *just* the summit that we'd hoped for. I believe many of these issues could've been solved with a combination of managing the relationship closer, getting more clear expectations down in a loose marketing agreement with everyone, and having the right incentives in place.

4. We didn't set clear promotion asks and expectations with all speakers. Some of our speakers for the summit didn't (at least clearly) have massive email lists to promote their

interview to, and for that reason we didn't ask every speaker to agree to a dedicated marketing email in advance. Because of that, we probably missed out on some opportunities to tap into networks and email lists that we didn't know existed.

5. We didn't land our biggest speaker prospects. At the end of the day, we fell short on landing the majority of the most-established speakers we reached out to for speaking at the summit. We had conversations with people like Robert Herjavec, Gary Vaynerchuk, Tony Robbins, Tim Ferriss, and Daymond John, but it turns out that these people tend to schedule their events further out in advance than say, a month and a half. Scheduling conflicts killed us on attracting a marquee name.

6. Timing is everything. In general, our two-month timeline for putting this summit together really put some limitations on the number of partnerships and speakers we could secure. On top of that, the only (best) week we could find to launch the summit was right after Dreamforce and just before people slid into the U.S. Thanksgiving holiday—not ideal, especially as Q4 tends to be a particularly distracting time for salespeople.

But for now, it's back to work on the Inside Sales Summit 2.0

Coming at you, April 2018!

We're bringing in more speakers, more partner brands, more in-depth (and varied) content, so come join us right here.

Plus, when you sign up today, you'll still get lifetime access to all of the interviews we did in the first round of the summit, before they're taken down. So seriously, grab your spot right here.

Oh! And if you have any questions or want feedback on your own virtual summit you're putting together… chime in below in the comments. Ask away, I'm here to help!