

Seller Event Playbook: Innovation Conference

July 2025 | Convention Center |
Columbus, OH



Getting Started

Getting Started

EVENT TITLE: Name

Event info

Hotel Reservations

Company A event support:

Marketing event lead: [Name](#)

Sales Enablement & Training lead:

[Name](#)

DATE:

July 27 – July 30

LOCATION:

Convention Center
400 N High St



QUICK LINKS:

- [Campaign Brief \(marketing\)](#)
- [Seller Event Playbook](#)
- [Master Campaign Tracker](#)
- [Email template \(OFT\)](#)
- [Case Study](#)
- [Business card request](#)

ENGAGEMENT GOALS:

Individual Goals: 3 – 5 Meetings total

FOCUS ON: (select to access related resources):

- Solution 1
- Solution 2
- Solution 3



7-Point Action Plan (What to Do)

Pre-conference

Goal Setting

1. Know my strategy:

- Set a clear objective for engagement (e.g., booking a meeting, generate leads, build relationships, gather competitive intelligence)
- How many meaningful conversations do I aim to have per day? (e.g., 3, 5, etc.) to meet our event engagement goals.

I aim to have engagements per day.

2. Know clients/prospects attending:

- Know key target accounts attending that I want to engage with
- Research the prospect's industry, company's sustainability goals, ESG (e.g., net zero targets, Scope goals, etc.).

3. Pre-outreach:

- Leverage marketing outreach email templates and/or social media post to pre-outreach contacts
- Use a Value Statement Structure (Issue – Action – Value), see example here.

Mid-conference Reflection

Recharge • Regroup • Reset

5. Reflection question:

- What have I learned from clients/prospects so far that can help refine my talking points to our solutions (e.g., common themes, challenges, competitor intel, etc.)?
- Am I meeting my engagement goals? If not, what can I adjust?

Yes Ontrack No

During the Conference

Engage

4. Engagement Plan:

Company A Sponsored Engagements

Know what the intentional (sponsored) activities we plan to do at this conference are to help with engagement goals?

Company A Sponsored Engagements		
	Yes	No
Booth	Booth #1154	—
Booth scanners	Yes	—
Dinner	—	—
Activity	—	—
Giveaway (at booth)	3 mon subscription Jeni's icecream	—

Exhibitor Resources

Conference

- Which conference sessions do I plan to attend where I have opportunities to interact with clients and/or prospects?
- Set clear goals for who you want to talk to at a conference session
- Who are the key target clients and prospects and/or companies aim to talk with?

Conference Agenda



7-Point Action Plan (cont'd) (What to Do)

Post-conference

Notes (type or write notes here)

Follow-up

6. Follow-up plan:

- What are the leads I need to follow up with (name, company, key points from discussion).
- What are the or the client/prospect owners' next steps to talk with these clients/prospects (e.g., schedule meeting, send more information, facilitate internal/external meetings)

6. Follow-up checklist:

Share relevant meeting information with prospect/account owners

Share insights or leads with internal teams (prospect/account owners, marketing, product, sales leadership)

Send personalized follow-up emails within 48 hours

Add leads to Salesforce and log interactions for future outreach (for your accounts/prospects)

Schedule follow-up meetings or calls with interested clients/prospects





Brand Positioning

(What to Say)

Company A

Company A is the global decarbonization partner of choice because we establish dynamic, long-term partnerships backed by extensive resources and applied expertise, to drive holistic decarbonization results.

“Our focus is on partnership, adapting to client needs, being there for their whole decarbonization journey, embracing a level of accountability, and having the resources to address any related needs along the way, strategy, implementation resources, carbon data excellence, digital tools, and financing solutions.”

While other traditional corporate advisory services are scrambling to add implementation capabilities to their offerings, we’re already positioned to do that executional work, if that’s what our client needs, as well as offer managed data services, a customizable suite of digital tools, and financing solutions.”

Event Common Messaging Theme (based on the event agenda)

Themes

Streamline Operational Efficiency Across Utility & Waste Services	
Messaging <small>(What to Say)</small>	Healthcare facilities are under increasing pressure to manage rising utility costs, complex waste streams, and regulatory compliance, all with limited staff. Company A’s Centralized Platform connects EDM, Bill Pay, and Waste solutions into one seamless system, freeing teams to focus on patient care instead of paperwork.
Improve Budget Accuracy and Resiliency with Energy & Utility Data Intelligence	
Messaging <small>(What to Say)</small>	Volatile energy pricing and decarbonization targets require a data-driven approach. With Company A’s EDM and Energy solutions, healthcare systems gain the insights to optimize usage, benchmark performance, and align capital planning with sustainability and resilience goals.



Brand Positioning (con't)

(What to Say)

Event Common Messaging Theme (based on the event agenda) (con't)

Themes

Meet Regulatory and ESG Reporting Needs Without Adding Workload

Messaging
(What to Say)

Healthcare systems are increasingly expected to disclose sustainability data, emissions, and ESG metrics. Company A helps you automate utility and waste data capture and centralize reporting across facilities to meet internal and external reporting demands, without burdening your team.



Starter Questions by Theme

(What to Say)

Why these are effective

Knowing and using event theme specific starter questions shows that you understand their world, builds credibility faster, and increases the likelihood of meaningful conversations.

Streamline Operational Efficiency Across Utility & Waste Services

	Starter Focus	What to Listen For...	Open-Ended Starter Questions
Starter Questions (What to Say)	Utility + Waste Process Pain Points	<ul style="list-style-type: none"> • Time-consuming bill validation or payment approvals • Manual waste tracking or fragmented vendors • Missed rebate or savings opportunities • Difficulty forecasting usage or spend 	<ul style="list-style-type: none"> • “How does your team currently manage and pay utility bills across facilities?” • “What visibility do you have today into your waste performance and costs across hospitals or clinics?” • “Are you seeing pressure to reduce costs or improve operational reporting from finance or sustainability leaders?”
	Readiness for Growth / Resiliency	<ul style="list-style-type: none"> • New hospital builds or renovations underway • Prior struggles with scaling systems across acquisitions or networks • Challenges aligning operational systems with ESG or resilience goals 	<ul style="list-style-type: none"> • “Are you expanding your facility footprint or centralizing operations? How is that impacting utility or waste management?” • “What role does your facilities team play in supporting sustainability or ESG initiatives?”
<p>Solutions to position:</p> <ul style="list-style-type: none"> • EDM (Energy & Data Management): Centralizes and validates utility and waste data across facilities, enabling analytics and reporting. • Bill Pay Services: Automates invoice processing, reduces late fees, and frees up facilities/AP staff. • Waste Services: Optimizes vendor management, improves diversion metrics, and supports cost control. • Centralized Platform: Unifies visibility across utility and waste services, enabling actionable insights for facilities, sustainability, and finance teams. 			

➤ Know Your Stakeholders by Theme (What to Say)

Why is identifying stakeholders effective

Decisions about utilities, waste, and sustainability typically require insights from various departments, such as finance, facilities, and IT. This section will help you identify hidden influencers and decision-makers early on, fostering stronger alignment and speeding up the sales cycle. A well-structured stakeholder map can unlock greater value and improve your chances of securing enterprise-level engagements.

Streamline Operational Efficiency Across Utility & Waste Services		
	Stakeholders to identify or ask about	Use prompts like
Starter Questions (What to Say)	<ul style="list-style-type: none"> • Facilities Operations Director or VP • Finance Decision-Maker (Controller, CFO, or Shared Services Leader) • Chief Sustainability Officer or ESG Reporting Lead • Capital Planning / Real Estate Executive • IT or Digital Innovation Sponsor (for platform alignment) 	<ul style="list-style-type: none"> • “Who else at your organization would benefit from this kind of platform visibility?” • “Do you typically collaborate with Finance or Sustainability teams when it comes to utility or waste goals?”



Starter Questions by Theme

(What to Say)

Improve Budget Accuracy and Resiliency with Energy & Utility Data Intelligence

Starter Questions
(What to Say)

Starter Focus	What to Listen For...	Open-Ended Starter Questions
Resiliency & Risk Planning	<ul style="list-style-type: none"> • Leadership push to enhance resilience post-disruption (e.g., storms, outages) • Need for energy risk mitigation strategies or scenario planning • Distributed infrastructure complexity 	<ul style="list-style-type: none"> • “How does your team plan for energy supply risk, outages, or grid disruptions?” • “Are you working on any long-term energy resiliency strategies, especially as your network grows or diversifies?”
Data Intelligence for Reporting & Decision Support	<ul style="list-style-type: none"> • Data living in silos or lacking context • Frustration with inaccurate or delayed data • Difficulty aligning finance, facilities, and ESG leaders 	<ul style="list-style-type: none"> • “How are energy data and usage insights shared across departments like finance or sustainability?” • “Where do you wish you had stronger visibility to drive more confident energy-related decisions?”

Solutions to position:

- **Energy Data Management (EDM):** Centralizes and normalizes energy data to improve forecasting, risk mitigation, and decision-making.
- **Energy Supply Management (ESM):** Aligns procurement with budget risk tolerance and resilience goals.
- **Ellipse Analytics Tool:** Offers granular insight into where energy inefficiencies or budget risks lie across large hospital networks.
- **Centralized Platform:** Connects energy data, forecasts, and facility-level performance for integrated decision-making.

Know Your Stakeholders by Theme (What to Say)

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Improve Budget Accuracy and Resiliency with Energy & Utility Data Intelligence

	Stakeholders to identify or ask about	Use prompts like
Starter Questions (What to Say)	<ul style="list-style-type: none"> • CFO or VP of Finance – responsible for budget accuracy and energy cost forecasting • Energy Manager or Director of Engineering – oversees operational performance and sourcing strategy • Sustainability/ESG Reporting Lead – increasingly involved in aligning energy performance with public and investor-facing goals • Capital Planning / Real Estate Strategy Leader – planning site upgrades, new builds, and infrastructure investments • IT/Data Analytics Leader – supports platform integration or visibility needs 	<ul style="list-style-type: none"> • “Who owns energy forecasting or budget responsibility at the enterprise level?” • “Are your sustainability and finance teams collaborating on long-term resiliency planning?”



Starter Questions by Theme

(What to Say)

Meet Regulatory and ESG Reporting Needs Without Adding Workload

Starter Questions
(What to Say)

Starter Focus	What to Listen For...	Open-Ended Starter Questions
Cross-functional Alignment	<ul style="list-style-type: none"> • Frustration between operations, finance, and sustainability teams over reporting responsibilities • Manual handoffs or inconsistent definitions of performance metrics 	<ul style="list-style-type: none"> • “Who owns ESG reporting within your system, and how do facilities or finance support that?” • “Are your data systems built for collaboration—or do teams manage their own reports?”
Data Accuracy & Audit Confidence	<ul style="list-style-type: none"> • Fear of non-compliance, reputational risk, or disclosure errors • Difficulty explaining or defending reported metrics to leadership or auditors 	<ul style="list-style-type: none"> • “How confident are you in the accuracy and audit-readiness of your utility or waste data?” • “What would make ESG reporting less of a fire drill for your team?”

Solutions to position:

- **Energy Data Management (EDM):** Automates the aggregation, validation, and structuring of ESG-relevant utility and waste data across multiple sites.
- **Reporting & Disclosure Services:** Supports CSRD, SEC, and custom ESG reporting through ready-to-use templates and advisory.
- **Centralized Platform:** Unites disparate data streams into a single, auditable system accessible by all internal stakeholders.
- **Ellipse Tool:** Surfaces outliers and trends across sites for more confident and consistent reporting.

➤ Know Your Stakeholders by Theme (What to Say)

Why is identifying stakeholders effective

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Meet Regulatory and ESG Reporting Needs Without Adding Workload

	Stakeholders to identify or ask about	Use prompts like
Starter Questions (What to Say)	<ul style="list-style-type: none"> • ESG/Compliance Lead or Chief Sustainability Officer – likely owns disclosures and public commitments • VP of Finance / Controller – responsible for internal controls and reporting accuracy • Facilities Ops Leader – owns or collects performance data used in reports • IT or Data Governance Lead – enables system integration and data sharing across teams • Investor Relations / Legal (for large hospital systems) – responsible for reputational and compliance risk 	<ul style="list-style-type: none"> • “Who is accountable for ESG or sustainability disclosures in your organization?” • “Are finance and facilities working together on reporting—or do they operate separately?” • “How is your team preparing for potential expansion of ESG regulations in your state?”



Notes

