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A Study of Delegate Acquisition, Data Management and Event Coordination for a B2B Manufacturing Summit

Mayur Durangi
Student, MBA- Operations and Supply Chain Management, School of Business, Indira University,
Pune, India 41103

Prof. Shrirang Sajanapwar
Professor of Practice – MBA, School of Business, Indira University,
Pune, India 411033
shrirang.sajanpwar@indirauniversity.edu.in

Dr. Sanjay Asati
Assistant Professor – MBA, School of Business, Indira University,
Pune, India 411033
sanjay.asati@indiraisbs.edu.in

Abstract - B2B industry events connect professionals, solution providers and organisations around sector-specific knowledge and business opportunities. Their success depends not only on event-day execution but also on systematic delegate identification, professional outreach, registration follow-up and reliable information management. This paper presents a practice-based study based on an On-the-Job Training (OJT) placement at TMF Mediaworks Private Limited, which operates The Manufacturing Frontier. The internship was undertaken in the events division from 12 June to 12 August 2026 and focused on delegate acquisition, database management and event coordination for the Future Factory Transformation Summit 2026, held on 10 July 2026 at Novotel Pune, Viman Nagar. The study uses a descriptive and observational approach, drawing on work records, task outputs and practical exposure rather than a questionnaire survey. Reported work outputs included engagement with more than 1,000 leads, over 1,200 calls, emails and follow-ups, support for 120 registrations, delegate reconfirmation, on-ground entry and coordination support, and post-event database cleaning and organisation. The observations indicate that targeted professional research, consistent follow-up, accurate registration tracking and structured database maintenance are complementary parts of one delegate-management process. The paper recommends a shared lead tracker, standardised status categories, scheduled reconfirmation, and a clear handover between acquisition, event operations and post-event data management. As a single OJT case, the findings are descriptive and should not be interpreted as a controlled evaluation of causal effects.

Keywords - B2B Event Marketing, Delegate Acquisition, Data Management, Event Coordination, Lead Management, Manufacturing Summit, On-the-Job Training

I. INTRODUCTION

Professional B2B events are designed to bring together decision-makers, technical specialists, manufacturers, technology providers and other industry participants. In manufacturing-focused events, the value of participation often depends on whether the audience is relevant to the subject, whether communication reaches the intended professionals, and whether registration information is dependable. Delegate acquisition is therefore more than sending invitations: it involves identifying suitable prospects, verifying professional details, explaining the event's relevance, following up and recording outcomes.

The Future Factory Transformation Summit 2026 was organised by The Manufacturing Frontier, operated by TMF Mediaworks Private Limited. The summit took place on 10 July 2026 at Novotel Pune, Viman Nagar, with an optional AMR Masterclass scheduled after the main event. The OJT placement in the events division provided practical exposure to the work before, during and after the summit.

This paper analyses delegate acquisition, data management and event coordination as connected processes. It documents the activities undertaken, summarises work outputs, identifies operational challenges and proposes practical improvements. It is based on the trainee's OJT experience and is not intended to be a formal audit of the organisation.

II. LITERATURE REVIEW AND CONCEPTUAL BACKGROUND

B2B marketing differs from broad consumer promotion because outreach is directed towards organisations and professionals whose roles, responsibilities and interests affect their relevance to an offering. Relationship marketing emphasises the development of ongoing professional relationships rather than relying exclusively on one-time transactions. In an event context, this supports clear communication, respectful follow-up and accurate recording of a prospect's interest and response.

Lead management provides a process for moving potential participants through stages such as identification, qualification, contact, follow-up and conversion. A shared database supports this process by making contact details and interaction status visible to the people responsible for outreach. Poor-quality records—such as duplicate entries, outdated designations or unclear registration status—can waste effort and create confusion during event preparation.

Event operations literature commonly treats event delivery as a sequence of interdependent activities, including pre-event planning, participant communication, registration, arrival management and post-event follow-up. The practical case

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considered here combines these ideas: delegate acquisition creates participation, data management provides the information base, and event coordination turns registrations into an organised on-site experience. The present paper uses these concepts as an interpretive framework; it does not claim to test a formal causal model.

III. RESEARCH OBJECTIVES

1) To understand the process used to identify and acquire relevant delegates for a B2B manufacturing summit.

2) To examine how professional communication and follow-up support registration conversion.

3) To study the role of database quality, verification and organisation in delegate management.

4) To document the connection between pre-event delegate activities and on-ground event coordination.

5) To identify practical challenges and recommend process improvements for future events.

IV. MATERIALS AND METHODS

Research design: The study follows a descriptive, observational, single-organisation case approach based on the OJT completed at TMF Mediaworks Private Limited from 12 June to 12 August 2026. No primary questionnaire survey was conducted.

Sources of information: The paper draws on the OJT report, task records, work outputs and direct practical exposure to delegate engagement, registration tracking, event-day support and database management. The findings reflect the trainee's role and available records.

Activities studied: The work covered professional research and lead identification; calls, emails and WhatsApp communication; follow-up and registration support; registration reconfirmation; delegate welcoming and entry support at the summit; and subsequent database cleaning, verification, categorisation and reorganisation.

Tools: Google Sheets was used for database maintenance, categorisation and tracking. LinkedIn supported professional research and information verification. WhatsApp was used for professional communication and follow-up.

Scope and limitations: The case focuses on one summit and one OJT period. The available information supports descriptive reporting of work outputs, but does not provide a controlled comparison of channels, verified channel-level conversion rates, or a basis for claiming that any one activity alone caused the registration outcome.

V. EVENT AND OJT PROCESS

The OJT process can be understood as a seven-stage workflow. First, the existing database and professional sources were reviewed. Second, records were cleaned and enriched. Third, potential delegates were identified and qualified based on professional relevance. Fourth, outreach was conducted through calls, emails and WhatsApp, with follow-ups for interested or unresponsive prospects. Fifth, registration status was recorded and delegates were reconfirmed before the event. Sixth, on-ground support helped delegates with welcoming and entry-related coordination. Finally, the database was cleaned, verified and reorganised after the summit.

Stage	Main activity	Operational purpose
1	Database and LinkedIn research	Identify relevant professionals and verify details
2	Data cleaning and enrichment	Improve accuracy, completeness and usability
3	Lead qualification	Prioritise suitable prospective delegates
4	Calls, email and WhatsApp	Explain event relevance and engage prospects
5	Registration and reconfirmation	Track participation status and reduce uncertainty
6	On-ground coordination	Support delegate arrival and event entry
7	Post-event data management	Organise records for future use and reporting

VI. RESULTS AND DISCUSSION

A. Reported work outputs

The OJT report records work involving more than 1,000 leads and more than 1,200 calls, emails and follow-ups. The work supported 120 registrations for the summit. These figures are reported as project outputs in the OJT materials; they are not independently audited in this paper. Because calls, emails and follow-ups are combined in the reported total, the available record does not permit a channel-by-channel conversion comparison.

Reported indicator	OJT-reported output
Leads personally worked on	1,000+
Calls, emails and follow-ups	1,200+
Registrations supported	120
Event	Future Factory Transformation Summit 2026
Event date and venue	10 July 2026; Novotel Pune, Viman Nagar

B. Delegate acquisition and follow-up

The acquisition workflow required research before contact, explanation of the event's relevance, follow-up and consistent status recording. Professional research helped the trainee understand a prospect's company and designation before communication. Follow-up was important because an initial invitation did not necessarily lead to an immediate registration. Maintaining a record of responses and next actions helped organise repeated contact and reduce the risk of losing track of interested prospects.

C. Data management

Database work included identifying duplicate records, correcting outdated or incorrect information, adding missing professional details, categorising records and distinguishing registration and confirmation statuses. LinkedIn was used to verify professional information where required. These tasks supported both acquisition and event operations: accurate records helped direct communication to appropriate people and made it easier to identify delegates requiring reconfirmation.

D. Event coordination

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The summit provided an opportunity to observe the operational transition from pre-event registration to on-site delegate support. Activities included welcoming delegates, supporting entry and contributing to coordination during the event. This stage depended on accurate registration and confirmation information produced earlier in the process. Post-event database work extended the value of the event beyond the event day by improving the organisation of participant records.

E. Integrated interpretation

The principal observation is that acquisition, data management and event coordination should not be treated as isolated tasks. Acquisition generates prospects and registrations; data management preserves the quality and visibility of the information; and event coordination uses that information to support participation. A weakness in any stage can create additional work in later stages. For example, an unclear registration status can complicate reconfirmation, while duplicate or outdated records can lead to repeated or misdirected communication.

VII. CHALLENGES AND IMPROVEMENT OPPORTUNITIES

The OJT experience involved practical challenges typical of professional outreach: identifying relevant contacts, explaining the event to busy professionals, handling objections or delayed responses, maintaining follow-up discipline and ensuring that records remained updated as statuses changed. These observations are drawn from the internship experience and should not be read as quantified measures of organisational performance.

Observed process risk	Suggested improvement
Follow-ups can be missed	Use a shared tracker with owner, last contact, next action and due date
Duplicate or outdated records	Apply a standard cleaning checklist and periodic duplicate review
Inconsistent status labels	Use agreed categories such as new, contacted, interested, registered, reconfirmed and not proceeding
Unclear handover to event team	Maintain a final confirmed-delegate list with a defined update cut-off
Post-event records are difficult to reuse	Standardise fields and preserve a clean, searchable database

A common tracker should ideally include a unique record identifier, name, company, designation, contact source, communication history, current status, last contact date, next follow-up date and notes. Access should be limited to authorised personnel, and personal contact information should be handled according to company policy and applicable requirements.

VIII. FINDINGS AND RECOMMENDATIONS

The study leads to five findings. First, delegate acquisition is a staged process involving research, qualification, communication, follow-up and registration support. Second, follow-up and status tracking are important for maintaining continuity across repeated interactions. Third, data cleaning and professional verification support the usefulness of the delegate database. Fourth, on-ground event coordination relies on the quality and timeliness of pre-event registration information. Fifth, post-event database organisation is part of the event lifecycle rather than an unrelated administrative task.

The following recommendations are proposed from the trainee's perspective:

1) Maintain a shared lead tracker with clear ownership and next-action dates.

2) Standardise lead and registration status categories across the team.

3) Schedule delegate reconfirmation and establish a final update cut-off before event day.

4) Use a repeatable database-cleaning checklist for duplicates, missing fields and outdated designations.

5) Create a documented handover from acquisition staff to event operations, followed by a post-event data-cleaning checklist.

6) Where records permit, track channel-level outreach and conversion separately in future events to identify which communication methods are most productive.

IX. CONCLUSION

This OJT-based study describes how delegate acquisition, data management and event coordination operated together in preparation for and delivery of the Future Factory Transformation Summit 2026. The reported work outputs—1,000+ leads worked on, 1,200+ calls, emails and follow-ups, and support for 120 registrations—illustrate the scale of the trainee's involvement, while the event-day and post-event activities show that delegate management continues beyond initial outreach. The main practical conclusion is that a structured workflow, reliable data and disciplined follow-up help connect professional outreach with event delivery. Shared tracking, standardised statuses, planned reconfirmation and a clear operational handover are low-cost improvements that can make this process more consistent. As the study is based on a single OJT experience, further research using comparable data across multiple events would be required to evaluate effectiveness quantitatively.

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