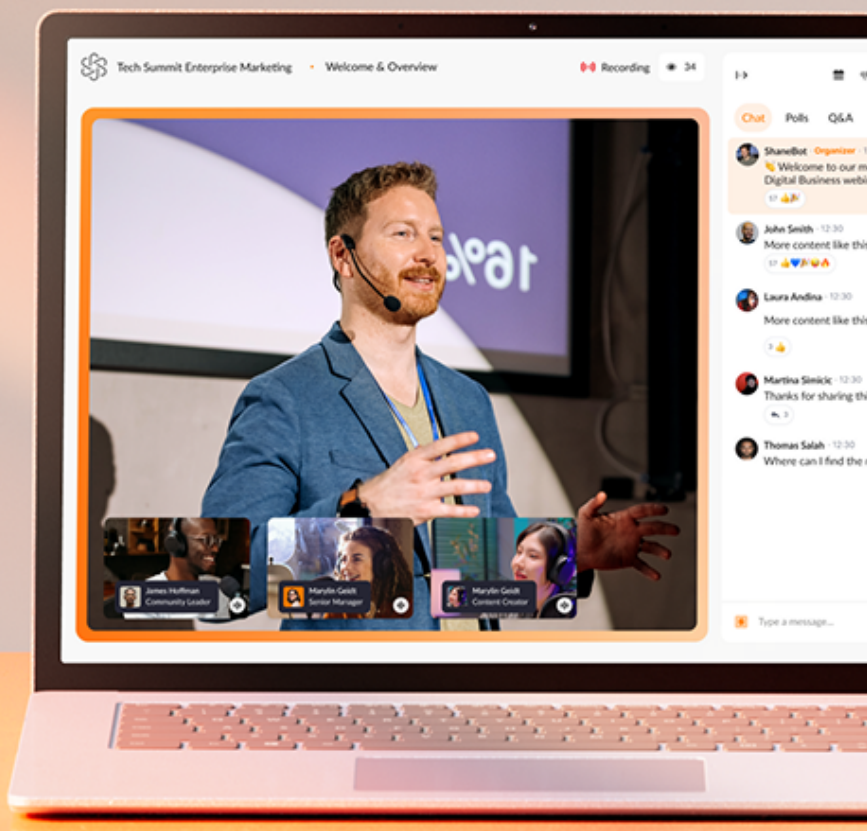
RingCentral

Unlocking the full potential of your event investments

Event marketing is one of the most powerful ways to build brand engagement and generate demand. But all too often, that impact can be short-lived for many teams.



Short-lived content
Event assets lose momentum quickly after broadcast.

Siloed tools
Video replays, follow-ups, and resources live across disconnected platforms.

Lost lead signals
Audience interest is hard to track without centralized engagement data.

Low ROI visibility
Success metrics are often limited to registrations and attendance only.

After the final session ends, content is often siloed, leads grow cold, and an event's full value fades.

With rising pressure to do more with less, marketers need better ways to stretch every asset, increase lead quality, build brand awareness, and maintain audience engagement long after event day.

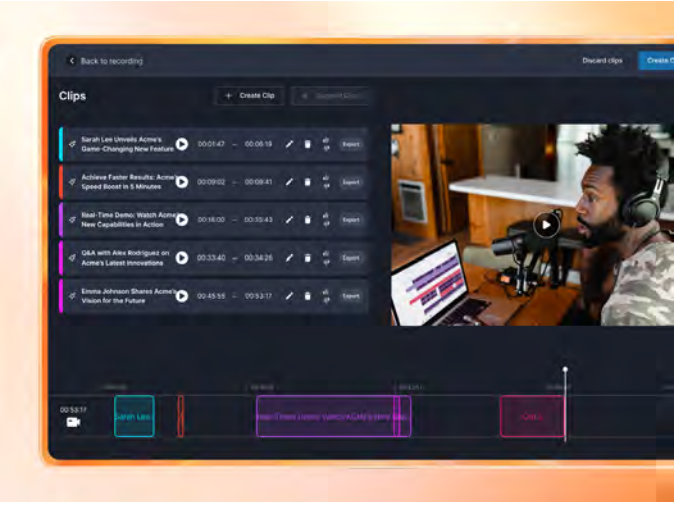
Whether you're running a flagship virtual event or a quarterly webinar series, RingCentral Events helps extend the life of your event content while capturing meaningful insights and qualified leads.

By combining AI-powered content generation, integrated lead capture, and centralized content management, RingCentral Events empowers marketers to drive ROI beyond the live moment—moving from one-time campaigns to always-on engagement strategies.

Extending engagement with RingCentral Events

Our approach is rooted in using cutting-edge AI tools and integrated platform experiences to ensure your event content continues delivering value beyond event day.

AI-powered content generation and highlight clips



Get more from every moment.

Automatically create bite-sized, shareable video content using AI. These clips can be used across social channels, nurture emails, and future campaigns, giving your best moments extended shelf life with no added editing time.

- Surface key takeaways instantly
- Fuel multi-channel campaigns with ease
- Increase reuse across your multi-channel content strategies

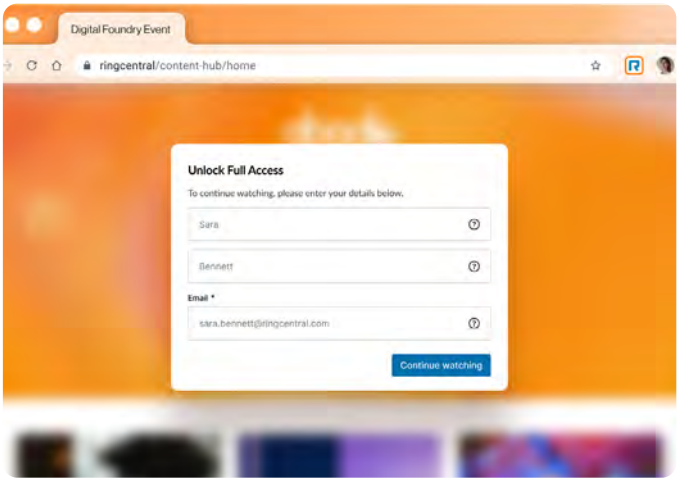
Centralized, branded content hubs

One destination. All your content.

Launch custom-branded pages where audiences can engage with your full library of event assets—from highlight clips and full session replays to downloadable resources and future event promotions.

- Keep audiences engaged between events
- Eliminate content silos across your team
- Reinforce brand leadership and community-building

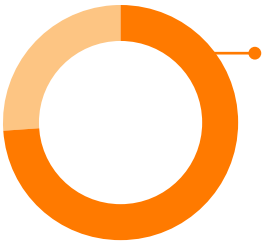
Lead capture & content personalization



Turn views into valuable leads.

Built-in gating features allow you to capture first-party data and personalize follow-ups based on user behavior. Gain visibility into what your audience consumes—and when—to power more relevant engagement.

- Increase qualified pipeline from post-event content
- Track and score content interactions
- Automate follow-up strategies with greater precision



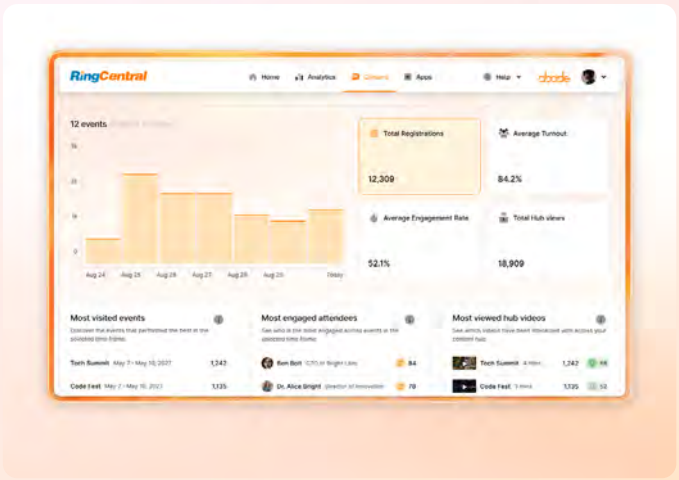
74%

of marketers say their event ROI increases significantly when event content is reused for future campaigns

(Forrester)

" When I do events, I always think about how to create this event that I can repurpose forever and create evergreen content that I can make on social, blogs, podcasts, newsletters, etc. It's about killing two birds with one stone—creating engaging experiences and generating a wealth of shareable content."

Daniel Murray,
Founder
The Marketing Millennials



From one-time tactics to long-term brand impact.

Event marketing today is about more than filling seats. It's about building brand awareness and staying top-of-mind. When repurposed strategically, a single standout event can become:

- A customer story on your homepage
- A short-form clip for social
- An asset for your outbound team
- An evergreen pillar in your content hub

By turning one event into many touchpoints, marketers drive visibility, reinforce trust, and create a lasting impression. When buyers are ready to act, your brand is already at the top of their minds.

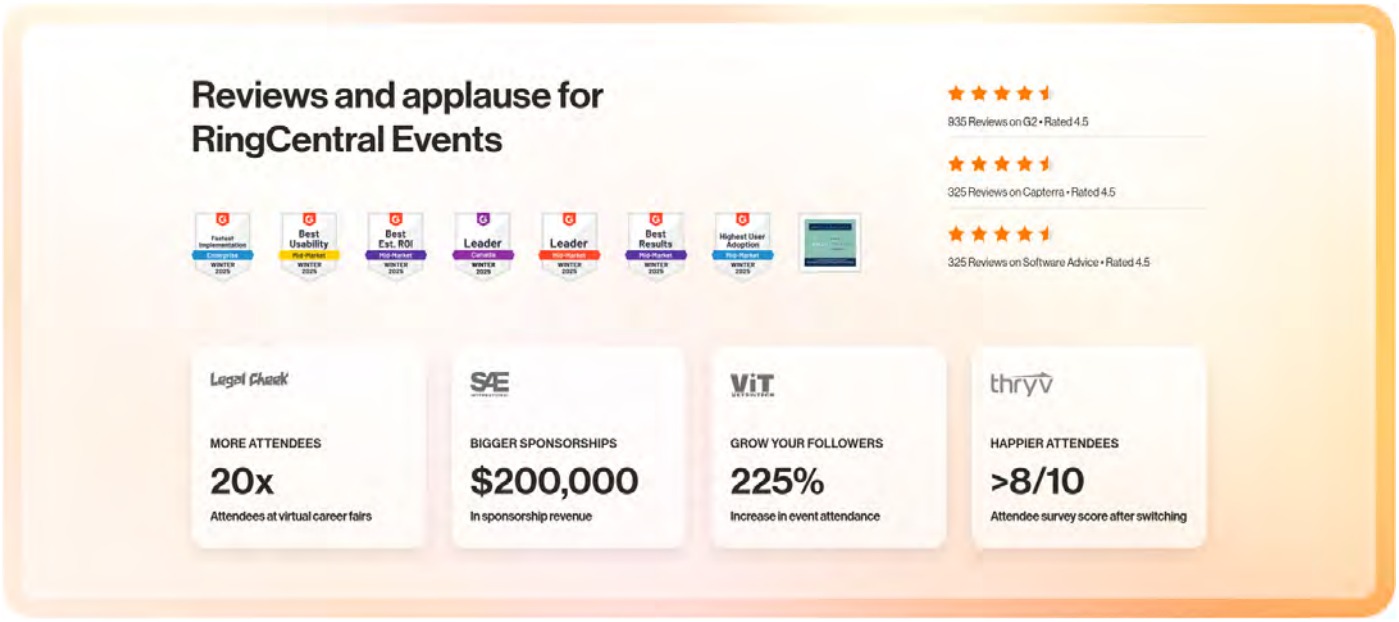
With RingCentral Events, your live event is just the beginning

Today's audiences expect more than a single interaction—they seek communities and ongoing experiences with the brands they trust.

By leveraging RingCentral Events' AI-powered highlights, centralized content hubs, and intelligent lead-nurturing tools, marketers can transform isolated events into continuous journeys of engagement that nurture long-term relationships.

Key platform capabilities:

- Surface key takeaways instantly
- Fuel multi-channel campaigns with ease
- Increase reuse across your multi-channel content strategies



Extend even further with integrations and customization

You've captured the moments, the leads, and the insights—now it's time to put them to work.

RingCentral Events makes it easy to sync engagement data from your Content Hub into platforms like HubSpot, Marketo, and more, helping you take action while interest is still high.

Connect 40+ integrations

Customize your event workflows and content experiences by connecting with over 40 App Store integrations and public or custom APIs.



Never settle for one and done. Ready to transform your event strategy?

Keep your audience coming back all year, amplify ROI, and transform your events into lasting brand experiences. Learn more about RingCentral Events and start your free trial today

Sign up now

For more information, please contact a sales representative. Visit ringcentral.com or call 855-774-2510.

RingCentral Inc. (NYSE: RNG) is a leading provider of AI-driven cloud business communications, contact center, video and hybrid event solutions. RingCentral empowers businesses with conversation intelligence, and unlocks rich customer and employee interactions to provide insights and improved business outcomes. With decades of expertise in reliable and secure cloud communications, RingCentral has earned the trust of millions of customers and thousands of partners worldwide. RingCentral is headquartered in Belmont, California, and has offices around the world.

RingCentral

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FIVE METRICS EVENT MARKETERS SHOULD STEAL FROM THE C-SUITE



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INTRODUCTION

At this year's Eventastic, one question came up again and again:

How do I prove the value of events beyond lead gen?

It's a challenge many event marketers are facing, because If we want event marketing to be seen as a strategic driver of business — not just a tactical lead machine — we need to get better at proving its long-term impact.

When all our energy, focus and resources go towards short-term wins, we:

- Struggle to prove the full value of what we do
- Get caught in a loop of short-term tactics instead of building long-term strategy
- Eventually lose the ability to make the case for more creative, experiential, or brand-building work.

This guide builds on a key section from our keynote talk: how to borrow the right metrics from your executive team to prove event impact in a way they recognise and respect.

We've kept it short, simple and actionable. You'll find clear definitions, tracking tips and a few ways to assess where you are today — so you can start shifting the conversation internally.

So, whether you're building a new reporting dashboard or just want better answers for your next debrief, we hope this helps.



1

CUSTOMER LIFETIME VALUE (CLTV)

WHAT IT TELLS YOU:

Are your event leads becoming long-term, high-value customers? Are customers you take the opportunity to meet and reconnect with at events showing a higher CLTV?

HOW TO TRACK IT:

- Compare average CLTV of event-sourced leads vs other acquisition channels
- Work with your CRM team to monitor account performance over 6–12 months
- Flag high-value accounts that first engaged with you at an event

WHY IT MATTERS:

CLTV shows the strategic value of your event leads. If they consistently outperform other sources, it's a clear sign your events are attracting the right kind of prospects.



HOW READY ARE YOU?

- ☐ ALREADY DOING IT
- ☐ NEED SOME HELP
- ☐ NOT STARTED

2

SALES CYCLE ACCELERATION

WHAT IT TELLS YOU:

Are your events helping deals move through the funnel faster?

HOW TO TRACK IT:

- Map average time-to-close for event-engaged leads vs non-attendees
- Use automation to tag event-engaged contacts in your CRM or sales funnel
- Identify which formats, audiences or themes shorten sales cycles most

WHY IT MATTERS:

A shorter sales cycle translates directly into cost savings and revenue efficiency — metrics that resonate with the C-suite.



HOW READY ARE YOU?

- ☐ ALREADY DOING IT
- ☐ NEED SOME HELP
- ☐ NOT STARTED

3

ACCOUNT EXPANSION

WHAT IT TELLS YOU:

Are your events helping grow revenue from existing customers?

HOW TO TRACK IT:

- Monitor cross-sell and upsell activity post-event
- Connect booth visits or session attendance with follow-on deals
- Collect sales team feedback on accounts that re-engaged at your event

WHY IT MATTERS:

Growth within existing accounts is often faster and more profitable.
Events that support this show a strong return on relationship.



HOW READY ARE YOU?

- ☐ ALREADY DOING IT
- ☐ NEED SOME HELP
- ☐ NOT STARTED

4

BRAND TRUST & AFFINITY

WHAT IT TELLS YOU:

Are your events improving how people feel about your brand?

HOW TO TRACK IT:

- Run brand recall and perception surveys before and after your event
- Monitor social sentiment, engagement and share of voice
- Capture qualitative feedback from attendees and speakers

WHY IT MATTERS:

Trust influences every stage of the buyer journey — but it's often under-measured. These signals help you quantify brand impact.



HOW READY ARE YOU?

- ☐ ALREADY DOING IT
- ☐ NEED SOME HELP
- ☐ NOT STARTED

5

DOWNSTREAM INFLUENCE

WHAT IT TELLS YOU:

Are your events influencing long-term behaviour, even if leads don't convert right away?

HOW TO TRACK IT:

- Use multi-touch attribution to map post-event impact
- Track 'cold' event leads that later convert through nurture or ABM programmes
- Identify contacts that re-engage after attending an event

WHY IT MATTERS:

Not all value is immediate. This metric helps you credit events for their role in shaping future opportunities.



HOW READY ARE YOU?

- ☐ ALREADY DOING IT
- ☐ NEED SOME HELP
- ☐ NOT STARTED

HOW TO GET STARTED TODAY

You don't need to reinvent your entire reporting framework overnight. Start small — pick one or two metrics that align with your goals, and build from there.

Here's how to take the first step for each:

1. CUSTOMER LIFETIME VALUE (CLTV)

- Ask your CRM or RevOps team for average CLTV by source
- Identify a few high-value accounts that first engaged at events
- Set a reminder to review event-influenced accounts after 6–12 months

2. SALES CYCLE ACCELERATION

- Compare time-to-close for event-engaged vs non-event leads
- Work with Sales to tag leads who interacted at events
- Look for early trends by event type or audience

3. ACCOUNT EXPANSION

- Map event attendees against accounts with open opportunities
- Ask Sales which clients mentioned the event post-meeting
- Track follow-on conversations with existing customers

4. BRAND TRUST AND AFFINITY

- Run a simple post-event perception survey
- Capture attendee quotes or testimonials while feedback is fresh
- Review social sentiment before, during and after the event

5. DOWNSTREAM INFLUENCE

- Make sure event leads are tagged in your nurture or ABM programmes
- Track re-engagement rates over time
- Use attribution tools to connect early touchpoints to future deals

FINAL THOUGHT

You don’t need to abandon lead gen — but you do need to look beyond it.

These five metrics help you prove that your events aren’t just generating contacts — they’re delivering real business outcomes. And that’s a narrative the C-suite is far more likely to get behind.

You don’t need perfect data to start. Even directional insight can help you tell a better story — and open the door to deeper analysis next time.



Who We Are

At Informa, we bring people together with knowledge that helps them learn more, know more and do more.
We're a leading international events, digital services and academic research group operating in dozens of specialist markets including Healthcare & Pharma, Technology, Finance, Education, Marketing, Health & Nutrition, and Foodservice.

Our Events: Where Your Industry Comes to Life

Our events are where your industry happens! As the world's leading exhibition organizer, we create powerful forums for signing deals and building relationships.

From the National Restaurant Show attracting 50,000+ participants to The AI Summit where commerical AI comes to life; we run events in dozens of specialist markets and subject matter categories, including in Healthcare & Pharma, Technology, Finance, Education, Marketing, Health & Nutrition, Foodservice, and many more.

Your Success Is Our Priority

With 14,000+ colleagues across 30+ countries, we're deeply embedded in the specialist markets we serve. This means we truly understand your business challenges and opportunities, allowing us to create events that deliver real value.

Whether you're looking to launch products, find new customers, build your brand, or stay ahead of industry trends - we're here to help you make it happen.

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swoogo

The Event Maturity Model

Unlock the power of your events

Stage 1	Optimize event registration
Stage 2	Capture full-funnel attendee insights
Stage 3	Map events to revenue impact
Stage 4	Become a core revenue driver
Stage 5	Grow a brand-driven community

The framework you've been waiting for

For too long, event leaders have been stuck in “execution mode,” pulling off the impossible without always getting the credit, influence, or strategic seat they deserve. The fact is, events can fuel serious business growth—but without clarity or a clear path forward, it’s hard to tell if you’re truly making progress or tapping into their full potential.

That’s where the Event Maturity Model comes in.

The Event Maturity Model is a strategic framework to help you build event programs that drive revenue, deepen relationships, and elevate your brand’s role in the market. It gives you a clear way to assess your current strategy, spot growth opportunities, and position events as a core driver of business success.

Boom, look at that. You’ve got yourself a compass now. 🔥



Elizabeth Pun
Content Strategist
Swoogo

How the Event Maturity Model works

The Event Maturity Model consists of five stages, each with three progression levels (Activation, Expansion, and Mastery), so you can track where you are and how to level up.

As you move through the stages, your events evolve from tactical execution to strategic growth levers, all the way to shaping something bigger: community, conversation, and the future of your industry. At that point, events aren't just what you *do*—they're part of who your brand *is*.



Couple things to keep in mind

First, this framework isn't your typical step-by-step "how to plan an event" checklist. It's not necessarily linear. Think of it more like a mindset shift—a way to zoom out and see your events not just as one-off tactics, but as powerful programs that can grow, evolve, and drive big-picture impact. It's about leveling up how you think about events, so you can level up how you do them.

Second, this isn't about rushing to Stage 5 (which, full transparency, is boss level. It's rare, and few get there—but that's what makes it worth aiming for).

Rather, it's about mastering each stage, building upon each one as a stronger foundation for the next. No matter where you start, there's value and opportunity at every level.

In fact, you might find yourself at different levels in different stages; that's not only okay, it's expected. As you master each stage, you're on your way to building a high-impact, revenue-generating, community-focused event ecosystem.

"You can host as many events as you want. But there are certain things that need to happen pre-, during-, and post-event to effectively drive ROI and long-term gains. The Event Maturity Model covers all of those pieces."

Stefanie Ordoveza, Head of Events at Guild

Who is the Event Maturity Model for?

The Event Maturity Model is for leaders who run revenue-driving events. If you're ready to shift from running events to running an event ecosystem that powers business, customer loyalty, and brand leadership, you're in the right spot.

It's designed to help you connect your event work to what your exec team cares about most: pipeline, retention, and market influence.

Wherever you sit, this model gives you the language and strategic lens to build your leadership. Use it to grow intentionally, so you can create events (and a career) that make a real impact.

Let's go.

The 5 stages of the Event Maturity Model

Let’s deep-dive into each stage of the Event Maturity Model, and what different levels of adoption look like within each. We’ve included some sample goals and things to consider for each stage to help you identify where you are and how to level up.

Stage 1 Optimize event registration

You can't drive event success if nobody shows up. With your event ideas in hand, Stage 1 is all about drawing people to your live or virtual events, boosting registration numbers through great UX that feels easy and personal. As you master this stage, you're not just packing the house. You're gathering juicy attendee data to inform future personalization.

Here’s what Stage 1 looks like across different levels:

Activating

At this level, you’re focused on creating a simple, frictionless registration experience. You likely haven’t incorporated any major personalization yet; you’re mainly trying to boost conversions and reduce drop-off.

Goal inspo and examples

Create a seamless, mobile-friendly registration form (no personalization through conditional logic yet)
Design a clean event website experience
Auto-send confirmation emails only (no segmentation yet)

Expanding

At this level, you're starting to prioritize personalization and data collection. You're using conditional logic and personalizing registration paths, capturing richer data (e.g., roles, industries, interests) that can be used to tailor the attendee experience later on.

Goal inspo and examples

Introduce multi-step registration workflows (e.g., expand from asking basic info to asking role-specific questions or industry details)
Personalize their registration experience (e.g., by role, by company, by registration type)
Collect preferences for sessions or tracks

Mastering

At this level, you're aligning with sales and marketing to capture strategic registration insights that inform sales engagement. For example, you might integrate questions to uncover buying signals for the sales team, or maybe marketing wants to understand specific challenges your C-level audience is facing.

You're using registration as a true insights tool. You're also weaving these insights into your event content and marketing strategy.

Goal inspo and examples

Collaborate cross-departmentally to ask the right questions during registration
Learn your attendees' goals and priorities through value-based questioning
Personalize follow-ups based on registration data

Stage 1 KPIs and stakeholders

Sample KPIs to measure	Stakeholders by the end of this stage
Registration conversion rate	Event Marketing
Abandonment rate on registration forms	Demand Gen
Completion rate for registration fields (data richness)	Sales
Personalized registration path adoption rate	
No-show rate	

Get more tools to nail Stage 1

Check out our digital guide for more tools, ideas, and resources to help you optimize event registration.

Show Me More

> 💡 **Swoogo Tip**
>
> Get aligned with sales and marketing to implement conditional logic and ask specific questions based on attendee information. Use this to create different registration paths for different attendee types, like sponsors, speakers, attendees, and your staff. You can also use this data to inform unique experiences on the day of the event.

07

How are other event leaders doing it?

"We created personalized registration paths where our attendees can submit all their information and also opt into specific programs at the event. For example, we might have a founders' session for startups and investors. So if someone fills out 'startup' when they're registering, we can then use Swoogo's conditional logic to add a question later in the registration that says, 'Hey, we noticed you said your company is a startup—you might find this session for startups interesting.' It helps us create a much more tailored experience."

Matt Baum, Senior Manager, Product & Operations at HLTH

Stage 2

Capture full-funnel attendee insights

Stage 2 is where you shift from collecting basic registration data to dynamic, behavioral attendee insights before, during, and after the event. You're capturing actionable data throughout the event lifecycle, which equips you to deliver more personalized experiences, strategize event content, and arm sales and customer-facing teams with real-time intelligence.

Here's how Stage 2 plays out across progression levels:

Activating

At this level, you're gathering attendee preferences (e.g., interests, current challenges, preferences) from registration only. You use this data to tailor pre-event communications.

Goal inspo and examples

Use attendee interests to inform event content
Strategize session formats based on attendee preferences
Send pre-event emails tailored to interests

Expanding

Capturing data doesn’t stop at registration. Now, you expand your efforts to capture live behaviors on the day of the event. For example, you’re tracking the sessions they attended, meetings they booked, and content they consumed. You feed these insights to sales after the fact, letting them know, “Hey, Dwight Schrute attended lots of beets sessions. Be sure to bring up beets with him.”

Goal inspo and examples
Track badge scans and session check-ins
Send post-session surveys ("Was this valuable?")
Session attendance triggers targeted nurture follow-up
Refine target personas based on behavior (e.g., correlate job titles or industries with session choices to spot behavior trends by persona)

Mastering

At this level, you’re delivering dynamic, personalized experiences based on real-time insights—before, during, and after events. Every interaction informs you on how to tailor next steps. You’re curating entire event journeys based on persona, and extending that personalization into post-event engagement (e.g., serving up custom on-demand content) and future event targeting.

Capturing and delivering on that full-funnel journey also means bringing your content to those who couldn’t attend (but wished they could), such as through on-demand content. This also helps generate interest for future events, as well as capture more insights for future personalization.

You’re delivering real-time or near-real-time insights to sales and offering more tailored intelligence at this point—but this is still geared toward fueling your sales team's post-event lead follow-up, and not yet about proactively weaving sales insights into your event strategy.

Goal inspo and examples
Craft valuable, personalized communications for the entire attendee journey: pre-event, to day-of, to post-event
Serve up personalized content hubs based on sessions attended
Let attendee insights guide your next event's content and structure
Collect specific reasons for declines or no-shows from registrants (e.g., time/location, experience, content relevance, format)
Combine registration data, session attendance, poll responses, and post-event content interaction into a unified view for future targeting
Personalize the next invite based on past attendance and engagement style
Equip sales with follow-up content tied to attendee behavior (e.g., session attendance)

Stage 2 KPIs and stakeholders

Sample KPIs to measure
Email engagement (tracking performance across segmented audiences)
Engagements day-of (sessions attended, interactions)
Lead scoring improvements based on event engagement
Post-event survey data on personalization effectiveness

Stakeholders by the end of this stage
Marketing Ops
Sales

Want smarter attendee insights?

Get more resources on how to capture full-funnel attendee data in our digital guide.

Show Me More

> 💡 **Swoogo Tip**
>
> Use registration data to personalize what your attendees see after signing up. It could be a custom event agenda, or an on-demand content hub built around their personal preferences—something that makes them think, "Wow! They actually used all that info I gave them during registration to send me content that I'm genuinely interested in!"

How are other event leaders doing it?

"Because Swoogo lets you design for both web and mobile, we put QR codes throughout the event space, on badges, and just leveraged that landing page as the hub for all event information. Sometimes you don't necessarily need a mobile app, say for a half-day event, but we can push attendees to the landing page that they've been interacting with throughout the event to get them to engage easily."

Brendan Shuff, Director of Event Technology at Event Strategy Group

Stage 3

Map events to revenue impact

In Stage 3, you're moving beyond engagement metrics to directly proving events drive business outcomes like pipeline, opportunities, and closed-won deals. You're partnering proactively with sales, marketing, operations, and customer success to ensure your event goals are tied to business metrics and can be successfully tracked and attributed.

Yes, you're tracking event-specific metrics like registration count, but you're also more strategic from the top—curating your attendee list based on prospects whose business you want to win, and customers whose business you're hoping to retain and grow. You don't blindly want thousands of attendees—you want the right ones.

Teams that are strong in this stage have a strong handle on their tech, tracking those goals effectively with a CRM solution and creating a cross-departmental feedback loop.

Activating

At this level, based on your event types and audiences, you're collaborating with sales, marketing, and customer success as a true partner, working with them early on to set basic pipeline, revenue, retention, or expansion goals. This collaboration guides the quality of attendees you want to invite.

At this point, your main focus is showing events' impact on pipeline. Your processes and feedback loops are still semi-manual.

Goal inspo and examples

Develop shared goals with sales, marketing, and customer success on new business and customer growth that you want to drive from your events

Track "event-sourced" leads

Follow strong debrief process with sales post-event to share actionable intel and develop opportunities identified at event

Expanding

Incorporating your CRM, integrations, and operations team is fundamental to expanding in Stage 3.

You're scaling attribution with less manual effort, using a CRM to automatically track leads, pipeline influence, customer growth, and retention goals leading up to and after your event. Organizations in Stage 3 also lean into a marketing automation solution to set up email nurture campaigns for registrants, attendees, and site visitors who dropped off.

Goal inspo and examples

Connect event software with your CRM and marketing automation solution
Set up a campaign ID or tracking solution for your event(s) to effectively track attribution
Auto-attach event touchpoints to opportunity records
Automate email nurture campaigns
Pull campaigns from your martech tools to your event invitation lists
Create pipeline dashboards showing event influence

Mastering

At the mastering level, you've established trusted attribution models that show event ROI across new business and customer growth (impact on pipeline, deal velocity, and customer expansion). By now, your team is also super comfortable using your CRM solution to share real-time insights with other teams. You're able to confidently map events' impact on revenue.

Goal inspo and examples

Set up attribution reports showing $X pipeline sourced vs. influenced
Sales insights dashboards show attendee behavior and deal acceleration impact
Event-driven revenue is used in quarterly business reviews (QBRs)

Stage 3 KPIs and stakeholders

Sample KPIs to measure
Influenced pipeline (new business, upsells, renewals)
Sourced pipeline (new leads created via events)
Opportunity conversion rates for event-engaged leads
Closed-won revenue attributed to events
Event-influenced customer expansion rates

Stakeholders by the end of this stage
Sales
Customer Success
RevOps

Grab more resources to nail Stage 3

Explore our digital guide for more tips and tools to prove how your events drive business impact.

Show Me More

> 💡 **Swoogo Tip**
>
> Integrating your CRM with your events platform will not only show you all of your leads' event interactions and drive sales conversations, but it will also allow you to see the full picture of all your marketing efforts in one place. You'll see how attendees are engaging with you, your events, and your other marketing content in the context of their whole journey. Swoogo integrates with CRMs like Salesforce and HubSpot to automate the bulk of your data syncing.

How are other event leaders doing it?

"Some folks see 'revenue' and think solely of ticket sales, but it's important to remember that 'revenue' can be all-encompassing. There's the opportunity to engage with new leads, in-pipeline accounts as well as retain and expand existing deals too. This is where viewing events as a pivotal part of your GTM/sales strategy can really unlock revenue potential!"

Stefanie Ordoveza, Head of Events at Guild

Stage 4

Become a core revenue driver

Now that you can prove the business value of events, this stage is where you take a seat at the strategic table. Events shift from being reactive support tools to proactive revenue levers across the customer lifecycle—from pre-sales (new business) to post-sales (customer upgrades, renewals, and retention).

You're building events directly into your integrated revenue campaigns, where they're accelerating revenue across product launches, territory expansion, and other key initiatives. Events are a core pillar for your GTM strategy, and are recognized as such by C-suite leadership.

Activating

Early on, you're incorporating events into your GTM motion. When you're launching a new product or your marketing team is pushing out a new campaign, events are seen as a way to amplify the messaging.

In other words, you've got a seat at the revenue table, but you may still be reacting to GTM needs—*helping* sales, marketing, and CS—rather than shaping revenue campaigns.

Goal inspo and examples

Annual and quarterly planning sessions with cross-functional business leaders to discuss major marketing themes and how events will support

Strategize event timing and content to map to larger revenue initiatives, such as:

- Executive dinners in new sales territories (reactively scheduled after sales expansion)
- Customer renewal happy hours scheduled before big renewal periods
- Product launch webinars held after marketing requests an event

Expanding

At this level, you're now becoming a strategic contributor. You're co-designing GTM campaigns with events as a core component, designed intentionally to drive pipeline, renewals, and expansion. Events are a must-have (not a nice-to-have) to hit quarterly revenue goals.

Goal inspo and examples

Measure event success against goals for annual recurring revenue (ARR), net revenue retention (NRR), and gross revenue retention (GRR)

Score success on quality meetings, pipeline velocity, and expansion revenue

Design field marketing events around target account lists (key ABM strategy)

Schedule churn-reduction workshops proactively based on product adoption gaps

Events become a key component of sales' quarterly paths to hitting their numbers

Mastering

If you're mastering this stage, your events are indispensable to revenue efforts. Event calendars shape launch timelines, product roadmaps, and GTM strategies —not the other way around.

Business outcomes, like deal acceleration and account growth, are planned *through* events. Insights from events also influence roadmaps or corporate strategy.

Goal inspo and examples
Plan product roadmap and launches around annual user conference
Lower CAC (customer acquisition cost) and widen reach by blending event formats (e.g., webinars, roundtables, regional pop-ups)
Revenue teams use the event schedule to map out deal acceleration plays (e.g., enterprise sellers know key accounts will attend a specific leadership summit, so they build custom experiences to engage executives pre- and post-event)
After identifying stalled deals in the pipeline, revenue team invites decisionmakers from those accounts to an exclusive VIP track at a regional showcase event
A post-event dashboard shows which existing customers visited specific product booths, asked in-depth questions, or scheduled time with product managers. This data is routed directly into CS and account growth teams' workflows, who then launch expansion plays with highly personalized outreach

Stage 4 KPIs and stakeholders

Sample KPIs to measure	Stakeholders by the end of this stage
Influenced ARR (annual recurring revenue)	GTM leaders
NRR (net revenue retention) for event-engaged accounts	Executive leadership
GRR (gross revenue retention)	

CAC (customer acquisition cost) and payback

Deal velocity improvement (time from lead → closed-won)

Event-driven account expansion rates (upsells, cross-sells)

Snag more Stage 4 tools

Check out our digital guide for additional resources on integrated revenue campaigns, working with other GTM leaders, and more.

Show Me More

> 💡 **Swoogo Tip**
>
> Having a great event platform is crucial here, because collecting data isn't usually the problem—consolidating that data into a clear story is where it's easy to get stuck. For a quick pulse on event program health, Swoogo's highly customizable dashboard gives you a session summary that includes KPIs like the number of registrants, registration by session, revenue, and more.
>
> Plus, did you know Swoogo has a calendar widget where you can aggregate all of your events on one calendar to promote to your prospective attendees? Swoogo's open API also allows you to plug your data from Swoogo into a business intelligence tool like Looker or Domo to make that data more actionable.

How are other event leaders doing it?

"We've successfully been able to get executive buy-in on the value of our events strategy by showing the pipeline data attributed to events, and getting executives to show up and engage at the event. This year, leadership tasked marketing with building a proposal for what we want to launch on stage at our annual conference, Collaborative. This plan then drove the product roadmap. Product was asked to deliver based on our event timeline. Our messaging and content will also ladder up to this major market launch."

Laura Kaiden, Senior Manager of Events at Classy

Stage 5

Grow a brand-driven community

At the pinnacle of this model, your events become industry pillars and must-attend experiences. You've moved beyond just leads and pipeline—you're creating eagerly anticipated, deeply respected events that foster lasting community, brand loyalty, and market leadership. All of this fuels organic demand and long-term growth.

Think of Atlassian's Team event, HubSpot's INBOUND, Adobe Summit, or Dreamforce. These events transcend product to actually shape the market, positioning their companies as true industry thought leaders.

Activating

The beginning of Stage 5 marks the shift from events as purely transactional experiences to powerful brand-building platforms. You're aiming to build emotional connections and loyalty at your events, transforming attendees into advocates. Your guiding mindset is clear: attendees should want to come back for the *community*, not just the content.

Goal inspo and examples

Curate VIP networking lounges or affinity group gatherings (e.g., Women in Tech breakfasts)

Launch a branded event hashtag and drive user-generated content (UGC)
Conduct post-event NPS survey

Expanding

At this level, your events become the launchpad for ongoing engagement. You create community programs around your events, pointing attendees to initiatives like user groups, executive councils, loyalty programs, regional events, certification programs, and other experiences that reinforce connection and influence. Essentially, you're extending the event experience well beyond the event itself—turning fleeting moments into long-term community and advocacy.

Goal inspo and examples

Invite VIPs to annual executive councils or advisory boards
Create a private Slack group for alumni
Launch smaller regional events laddering up to your larger annual event
Start loyalty programs with exclusive perks for repeat attendees

Mastering

At this level, your event brand transcends your product; it becomes an industry-wide platform for innovation, thought leadership, and community. People attend not just to learn about your offerings, but to be part of something transformative—they come for inspiration, bold ideas, and meaningful connections. After all, your events define trends and set the tone for your industry.

You've gone from building community to being the community. It's not just customers anymore—the whole industry is orbiting your brand, wanting to take part in the conversation you're hosting.

Goal inspo and examples
Thought leaders, partners, and media actively seek to participate in your events
Waitlists not just from customers, but the broader industry trying to attend
Your event inspires sub-communities to form on their own around your brand and event (local chapters, industry think tanks)

Stage 5 KPIs and stakeholders

Sample KPIs to measure
Net Promoter Score (NPS) for event/ community programs
Community participation and growth rates
Share of voice (mentions in media, social)
Word-of-mouth registration rates (referrals, organic lift)
Advocacy rates (testimonials, case study participation from event attendees)
Community-driven deal attribution (new logos from community referrals)

Stakeholders by the end of this stage
GTM leaders
Executive leadership
Brand and community leads
Customers and advocates
Industry leaders and influencers
Media

Get resources to grow a lasting community

Dive into our digital guide for more tips and strategies to turn your event program into a year-round, community-driven engine.

Show Me More

> 💡 **Swoogo Tip**
>
> Consider a multi-format approach to extend the value of your events and continuously engage your community. For instance, you can layer in webinars, on-demand experiences, local micro-events as offshoots of your major conference, and more to fuel engagement and conversation year-round.

How are other event leaders doing it?

"You never leave a stage behind. You continue to build on the foundation you've established. The jump to stage 5 involves making a shift away from solely product/sales focus, and more into industry and thought leadership. It's creating lifelong relationships at the highest decision-making levels that establish us as a trusted partner.

We also see our events as a way to establish and nurture community. We use our events to push to the next step that continues to add value for the customer: webinars, group forums, engaging in Atlassian Community, and Atlassian University."

Josh Shepherd, Head of Event Technology at Atlassian

How mature is your event model?

No matter where you're starting, the Event Maturity Model is here to give you clarity, direction, and momentum as you evolve your event strategy. Use this framework to turn your events into true growth engines for your company. Every stage you unlock builds not just better events, but a stronger brand and a bigger voice at the leadership table.

When you're ready to put it all into action, we're here to help. Learn how Swoogo's event management platform can help you personalize attendee experiences, integrate seamlessly with your tech stack, and measure your events' impact.

Let's build something big.

Ready to take your events to the next level?

Get a Demo

SESSION BOARD

12 Strategic Speaker Data Points To Track



A resource made exclusively for

EVENTASTIC

Unlocking Your Untapped Marketing Powerhouse: Why You Need a Speaker CRM

I've had a front-row seat to the transformative power of speakers.

They're not just voices on a stage or faces on a screen; they're your company's most potent, yet often underutilized, marketing assets.

Think about it. These individuals are your Subject Matter Experts, influencers, thought leaders, and content creators—everything Google prioritizes in its E.E.A.T. (Experience, Expertise, Authority, Trust) framework.

Speakers possess networks, insights, and credibility that can amplify your brand's message far beyond the confines of a single event.

Yet, I consistently see event marketing teams treating speakers as ephemeral resources, forgetting their value the moment the event concludes. This is a monumental missed opportunity. We're essentially leaving a goldmine of marketing potential buried in the sand.

It's time to recognize speakers as the strategic assets they truly are.



Chris Carver
Co-Founder and CEO
SESSION BOARD

SESSION BOARD

PART 1

12 Data Points To Track For Your Speakers

SESSION BOARD

12 Data Points To Track



Geographic Data



Key Contact: Assistant



Speaker Diversity



Session Transcripts



Past Videos + Presentations



Network Efficacy



Content Syndication



Speaker Training



Industry Expertise



Sales Cycle Data



Internal Notes



Track Past Sessions

#1 | Geographic Data

In today's remote-first world, a speaker's location has become a strategic asset. Knowing where your speakers live allows you to:

- Tap into local expertise
- Strengthen community ties
- Build regionally relevant programming.

With **27% of event marketers investing more in smaller, regional gatherings**, this presents a golden opportunity to involve subject matter experts, influencers, and champions who are already in-market.

By tracking speaker location, your field marketing and community teams can easily invite them to participate in local meetups, customer dinners, or micro-events.

Beyond logistics, location data helps your event marketing team foster deeper relationships with key voices in each region - building affinity, loyalty, and brand alignment.

I**mpact:**

- Enables targeted field marketing
- Supports localized content and regional relevance
- Builds stronger relationships with local industry influencers

And then there's the FOMO factor:

People want to be where the action (and the influence) is. By creating city- or region-based cohorts of respected thought leaders and creators, your regional events become more desirable, more social, and more shareable. Influence attracts influence.

27% of event marketers

are investing more in smaller, regional gatherings..
Event marketers plans to host 11-20 smaller, scalable events designed to be replicated across various regions and formats.



#2 | Contact Data: Executive Assistant

This one’s simple—but essential.

We all know how tough it can be to get time on the calendar of a busy executive. Often, it’s not the speaker you’ll be coordinating with directly, but their executive assistant or someone from their comms or marketing team.

If you’re not tracking that contact info - or if it’s buried in a spreadsheet or floating around in someone’s inbox - you’re increasing the risk of miscommunication, missed deadlines, or losing the speaker entirely.

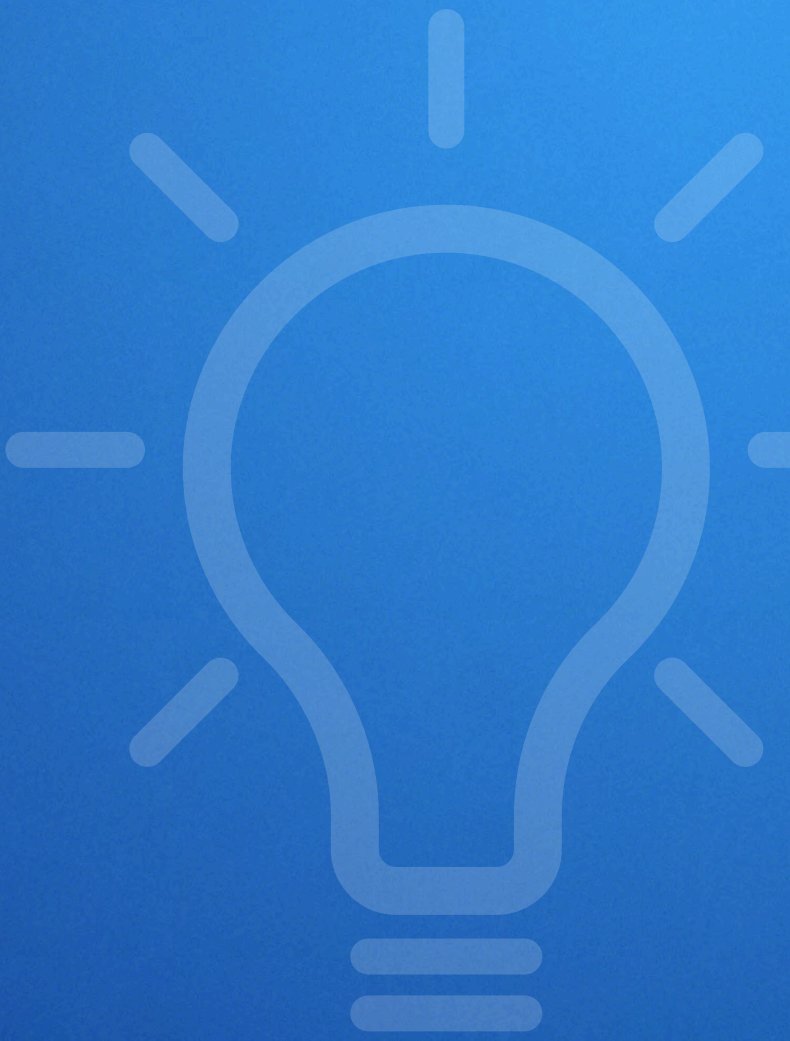
Storing this information in a secure, centralized system ensures continuity, especially when internal teams shift, contractors roll off, or institutional memory fades. It’s a small detail that can make a huge difference when it’s go-time.

Impact:

- Ensures direct access to gatekeepers and key collaborators
- Reduces friction in scheduling and communications
- Maintains continuity across team transitions or turnover
- Saves time and avoids last-minute scrambles

Pro Tip

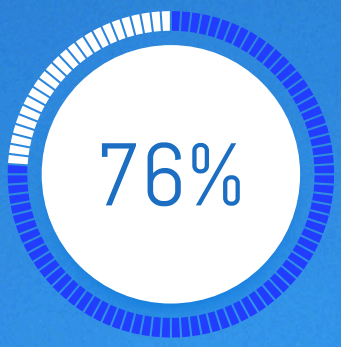
Always confirm and log EA communications contact details in the speaker contracting and/or onboarding process. It’s much easier to get that information up front.



#3 | Speaker Diversity & Representation

A diverse speaker lineup isn't just a DEI checkbox - it's a competitive advantage. Today's audiences expect to hear from voices that reflect the real world: diverse in gender, race, nationality, education, audience type, and lived experience. Curating inclusive programs drives richer conversations, broader perspectives, and greater audience engagement.

And the data backs it up:



of attendees say

they are more likely to attend an event that prioritizes diversity in its speaker lineup.

2023 EventMB report

To build truly representative programs, you need to track diversity-related data across your entire speaker ecosystem. This includes demographics like:

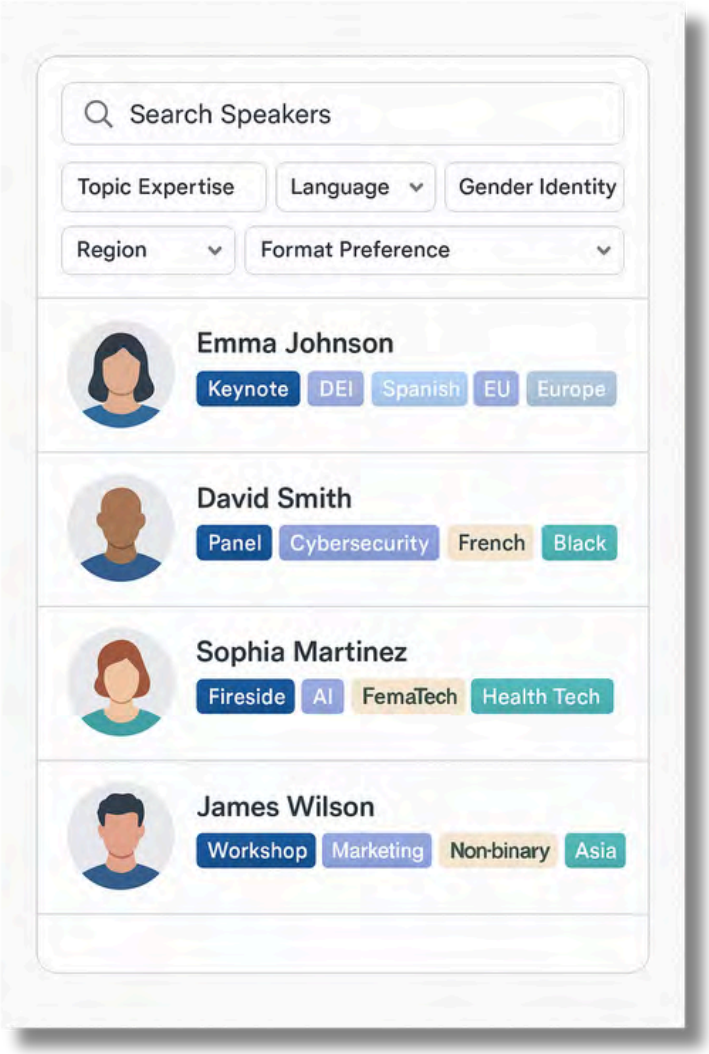
- Gender identity
- Nationality and global region
- Race and ethnicity
- Languages spoken
- Education background
- Industry or audience type

But true representation also means going beyond demographics.

Index your speaker database with additional filters such as:

- Company affiliation
- Past speaking experience
- Preferred content format (keynote, fireside, panel, etc.)
- Topic expertise
- Career level (e.g., executive, practitioner, creator)

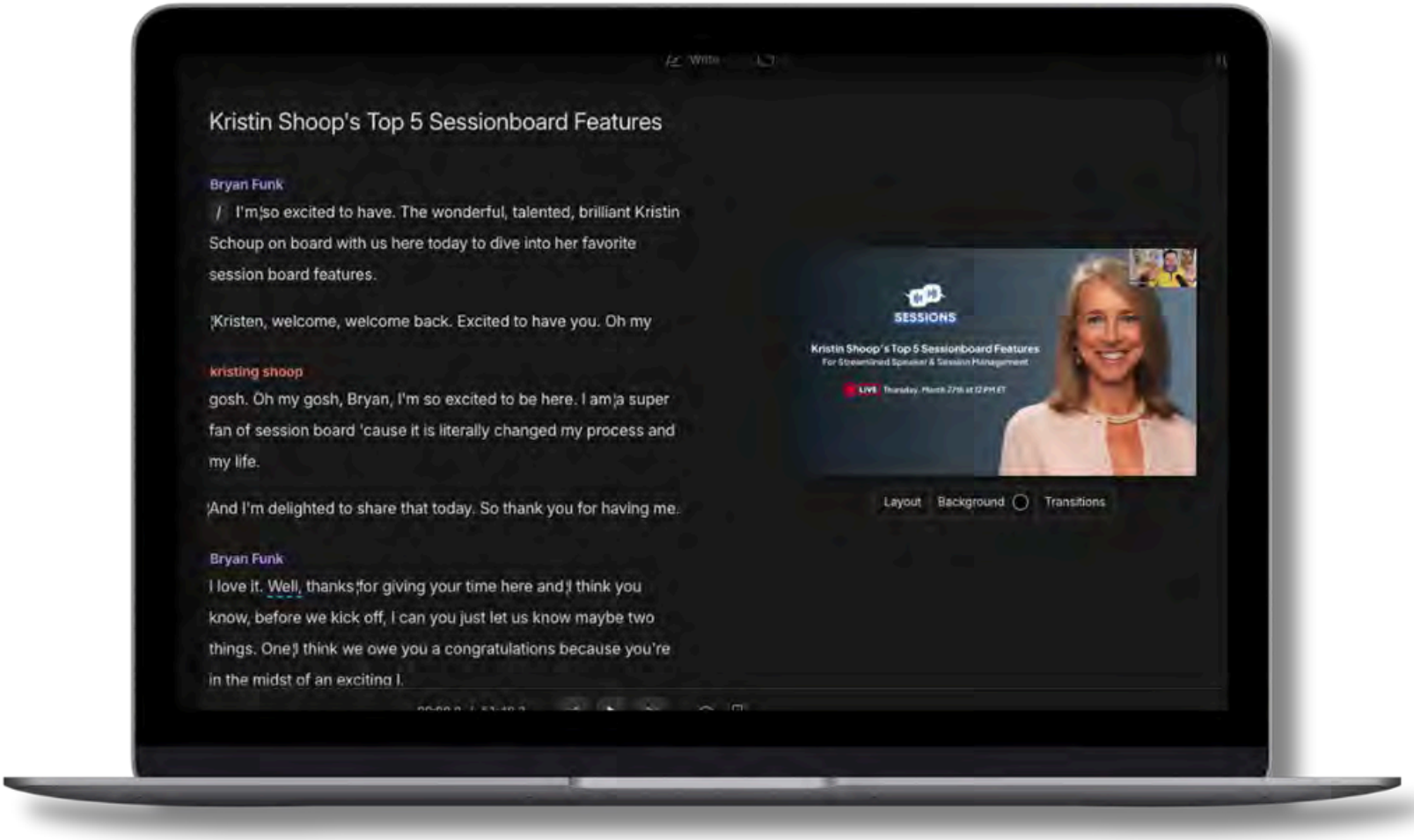
By capturing and centralizing this data across all events - conferences, webinars, podcasts, and beyond - you'll be able to curate stronger, more balanced agendas and **avoid the dreaded "same five people" loop.**



#4 | Session Transcripts and Summaries

Storing transcripts and session summaries alongside your speaker records unlocks an incredibly valuable dataset. **This content becomes searchable, reusable, and central** to fueling future event agendas, thought leadership pieces, and marketing campaigns.

Thanks to tools like NoteAffect, Rozie.AI, Voxo, and Wordly, it's easier than ever to capture high-quality session transcripts and summaries - often in real-time for live events. These tools not only enhance the experience for attendees (especially those who want real-time translation or accessibility support) but also set you up for long-term content ROI.



Descript's recording transcription and editing platform.

Even better, when integrated into platforms like Sessionboard, these transcripts become more than just records - they become assets.

By enriching your speaker profiles with session content, you gain the ability to search, sort, and discover ideal speakers or content themes for future events, webinars, podcasts, or marketing efforts.

Impact:

- Makes it easy to repurpose speaker content into blog posts, social snippets, articles, and on-demand assets
- Enhances your team's ability to find the right speaker/content match for future programming
- Supports real-time and post-event accessibility, engagement, and SEO
- Track SEO keywords and align session content with the E-E-A-T framework to produce high-ROI, search-optimized content

What is E-E-A-T?

Google's framework for evaluating high-quality content.

✅ Experience: speakers share lived experience in their topic
✅ Expertise: their background or credentials back up insights
✅ Authority: they're recognized in their field or community
✅ Trust: their content is helpful, accurate, and consistent

#5 | Past Speaking Videos and Presentations

One of the most useful assets you can collect for each speaker is video footage from their previous talks. It gives your team a real sense of who they are on stage - do they command the room, engage the audience, and deliver value? Or do they fall flat?

Having a centralized library of speaker videos and past presentations makes it easier to:

- Vet new speakers and assess delivery style
- Recommend the right format (e.g., keynote vs. panelist)
- Showcase talent internally or to stakeholders during programming discussions

Just like transcripts, this content also becomes a powerful marketing asset. A short clip from a high-impact session can fuel social promotion, support future speaker outreach, and even serve as teaser content for upcoming events.

Impact:

- Helps teams evaluate speaker presence, energy, and clarity
- Enables faster, more confident speaker selection
- Creates a marketing content library ready for reuse
- Provides internal stakeholders with visibility into speaker quality
- Supports year-round content strategy with authentic, event-based media

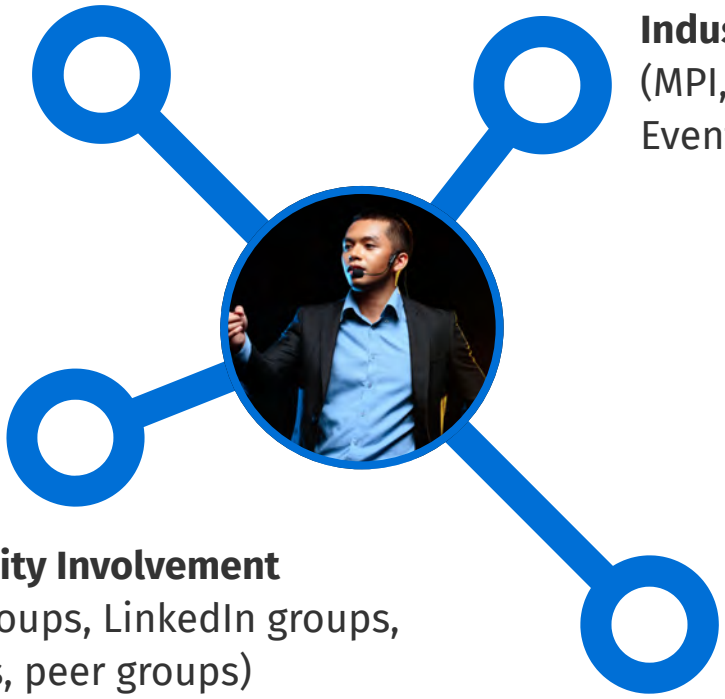
#6 | Network Efficacy (Reach & Engagement)

You're not just choosing a speaker—you're tapping into their network. In today's world of peer influence and trust-based marketing, that network can be a massive multiplier.

Understanding a speaker's network efficacy - **their reach and influence within your target audience** - is an incredibly valuable data point to track.

You can measure this in a few different ways

Social Influence
(Follower count, podcast downloads, subscriber base)



Industry Affiliations
(MPI, ASAE, CEMA, Club Ichi, Event Content Council)

Community Involvement
(Slack groups, LinkedIn groups, podcasts, peer groups)

Past Performance
in speaker marketing (email clicks, landing page conversions, social shares)

#6 | Network Efficacy (Reach & Engagement)

Critical data points to measure speaker efficacy include tracking: registrations influenced, total reach, shares per speaker, and conversion rate.



Speaker	Registrations Influenced	Total Reach	Shares
Alice Smith	45	112,000	68
John Doe	32	97,000	84
Carlos Lopez	57	146,000	123
Emily Johnson	64	70,000	40

Impact:

- Identifies speakers with strong audience resonance
- Helps marketing teams target niche communities
- Improves event visibility and registration
- Supports smarter speaker selection
- Turns your content strategy into a flywheel powered by influence



# of B2B Buyers

are more likely to engage with a brand's content if it's shared by someone they know or respect.

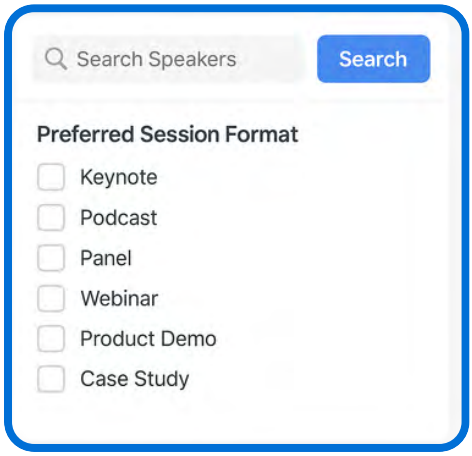
Demand Gen Report

#7 | Content Syndication

Your speakers aren't just one-and-done for your main stage. They can (and should) become part of your year-round content engine.

By creating a field like "**Preferred Session Format**" in your speaker database, you can easily track which speakers are:

- 🔥 Dynamite keynotes
- 🎙️ Podcast naturals
- 🧠 Panel pros
- 🧩 Webinar champions
- 📢 Product evangelists
- 📚 Case study collaborators



This small bit of metadata goes a long way in helping other teams across your org - like product marketing, demand gen, or customer marketing - quickly identify the right SME or champion for their campaign.

So the next time someone asks, "Do you know anyone who could speak on this customer webinar?" - you're not scrambling. You're sending over a curated, relevant short list in seconds.

Impact:

- Turns your speaker list into a searchable content partner directory
- Helps marketing and product teams move faster and smarter
- Builds strong cross-functional collaboration
- Extends the shelf life and visibility of your best speakers
- Supports a multi-channel content strategy

#8 | Speaker Training History

Not all great subject matter experts are great speakers - but training can bridge that gap.

Many organizations require their internal speakers to complete formal training before stepping on stage. **Tracking this info in your speaker database** can be a game-changer when sourcing the right fit.

When you know who's been through speaker coaching, media training, or even internal enablement programs, it becomes easier to:

- Recommend confident, stage-ready voices
- Match speakers to high-stakes formats
- De-risk panels and webinars by prioritizing trained participants
- Offer coaching support to promising speakers who need a boost



You might even want to **track training type** (e.g., presentation skills, storytelling, media coaching) or **training provider** (internal team, external agency, coach name) for more precision.

#9 | Industry Expertise and Niche Specialization

Know what your speakers are great at. By tracking keywords from session titles, abstracts, summaries, and transcripts, you can build a searchable layer of metadata that helps surface the right Subject Matter Experts (SMEs) for the right opportunities.

This is especially useful when you're building:

- Topically-focused agendas
- Case study-based campaigns
- Industry-specific webinars or regional events
- Niche podcast or newsletter content



Tag a speaker with terms like “data privacy,” “healthtech,” “GenAI,” “B2B demand gen,” or “supply chain optimization”- making them easier to find when those topics come back around for future events.

Think of it as SEO for your speaker content. The more granular and accurate your keyword tagging, the more powerful your search becomes.

Impact:

- Enables smarter, faster speaker selection for niche topics
- Builds a living index of your organization’s thought leadership
- Supports content reuse and cross-functional marketing campaigns
- Makes your speaker database exponentially more valuable

#10 | Sales Cycle Data

Sometimes, the best speakers are also your customers - or your target prospects. Understanding where a speaker sits in the sales funnel can help you navigate the relationship strategically and respectfully, while also opening doors for deeper collaboration.

Customer & Prospect Status

While most sales data should live in your CRM, including a simple “Customer” or “Prospect” flag in your speaker database can help your event team stay aware of key relationship dynamics. This context empowers you to:

- Avoid awkward outreach overlaps
- Identify when a speaker needs cross-team coordination
- Flag opportunities for deeper engagement or executive visibility
- Support customer marketing efforts with timely content opportunities

Sales Contact Data

Take it one step further: track who the speaker’s sales contact is. This unlocks smooth, behind-the-scenes coordination between your content, sales, and customer teams—ensuring the speaker feels supported and the relationship is nurtured holistically.

Impact:

- Enables cross-functional alignment between events, sales, and CS
- Ensures consistent communication
- Surfaces strategic opportunities for deeper customer involvement
- Protects in-flight sales deals from uncoordinated outreach

#11 | Internal Notes

“It takes a village.”

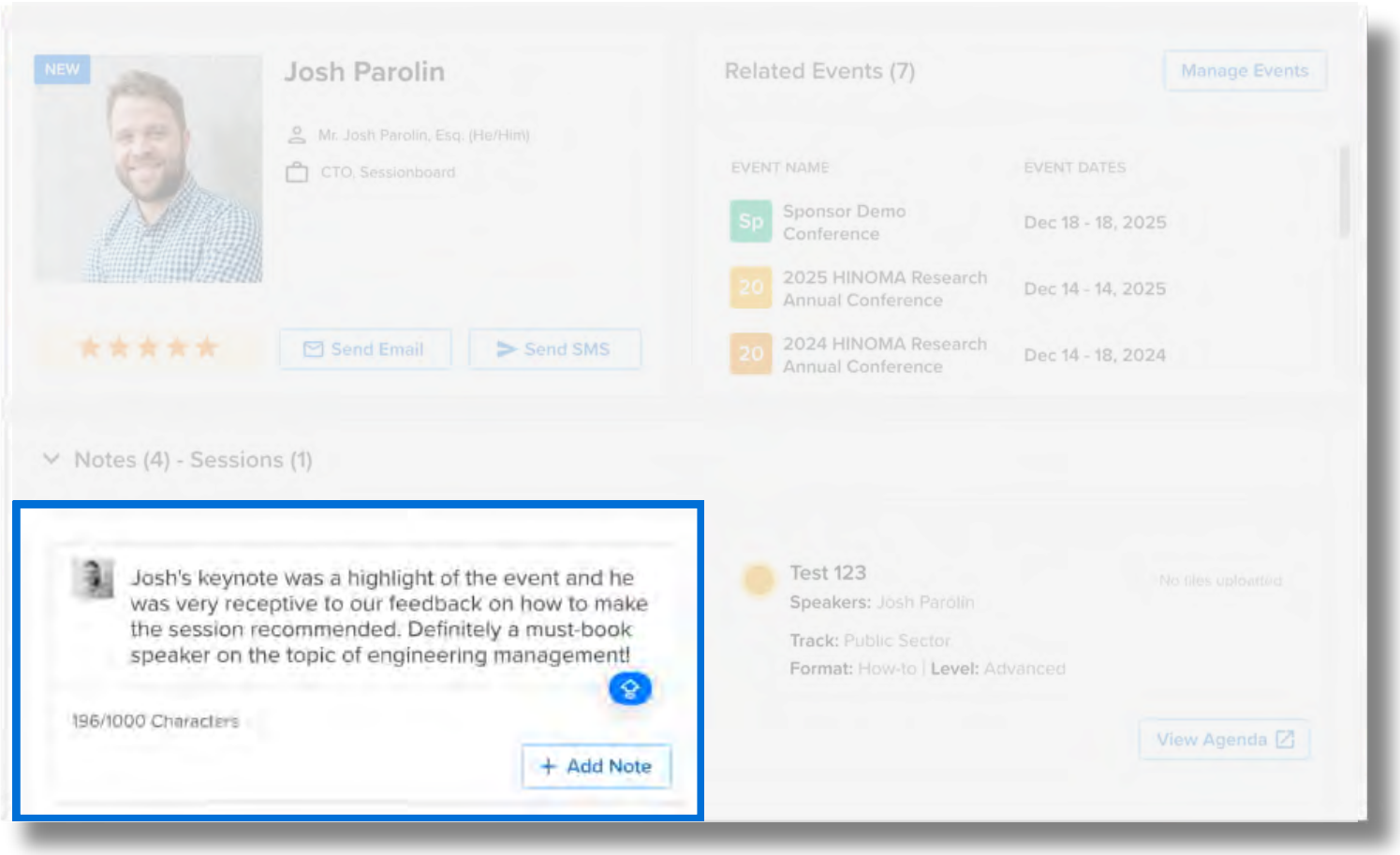
Between the conference team, third-party vendors, field marketing, webinars, podcasts, and community - multiple hands are often shaping a speaker’s journey.

That’s why capturing internal notes about each speaker is so important.

Great details to capture include:

- What’s it actually like to work with them?
- Are they high-maintenance or low-lift?
- Did they submit materials late or require tons of hand-holding?
- Did they shine in panels but fall flat in solo formats?
- Were they well-prepared—or just good at talking?
- Did they oversell or misrepresent their talk?





This kind of context helps your team avoid missteps, better match speakers to the right formats, and improve the overall experience for everyone involved.

Impact:

- Preserves institutional knowledge across teams and events
- Helps avoid problematic speaker experiences
- Ensures better fit between speaker and format
- Promotes alignment across marketing, content, and production
- Saves time (and stress) for future teams

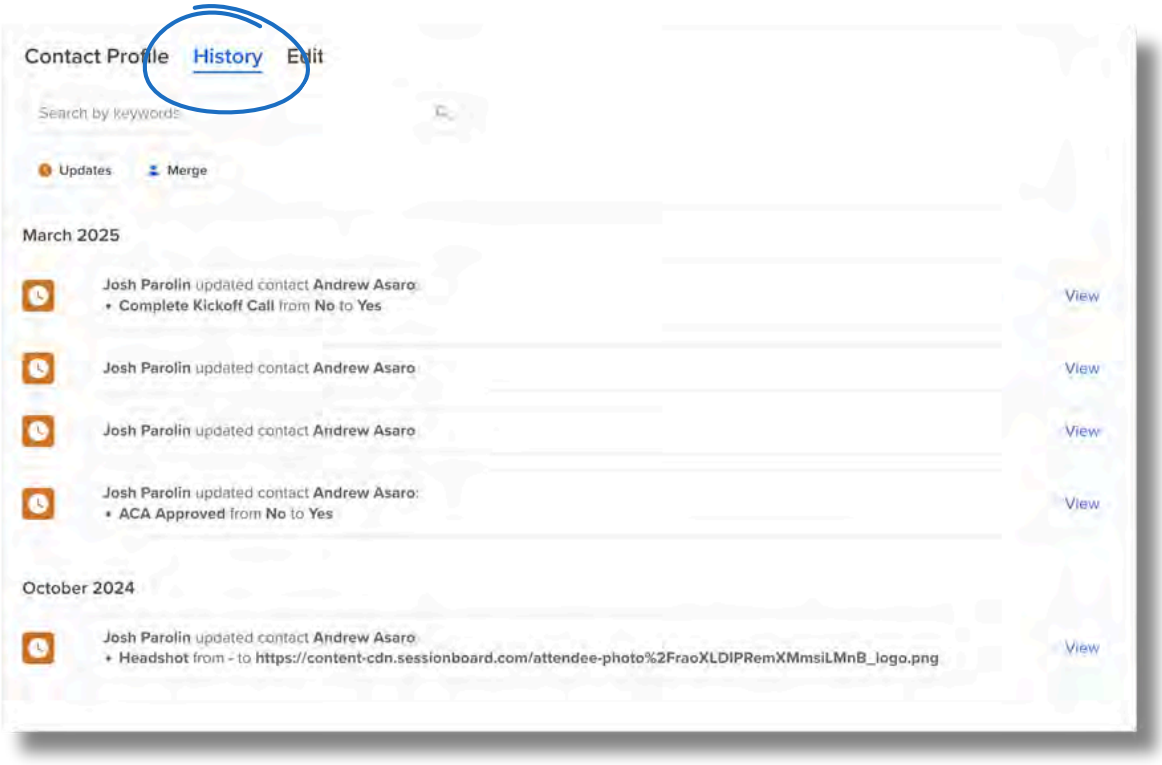
#12 | Track All Past Events and Sessions

Let's be honest—we've all gone back to the same speaker a few too many times. Meanwhile, others with incredible potential go underutilized. The solution? A system that automatically logs each speaker's event and session history.

By building this into your speaker profiles, you gain a full view of:

- How often each speaker has participated
- What types of sessions they've delivered
- Which topics they've already covered
- Which formats they've been most effective in

This makes it easier to balance your lineup, avoid overexposure, and spotlight underused voices. It also creates a historical trail that future team members (or agencies) can rely on when making programming decisions.



Bonus | Other Helpful Data Points

If you want to take this even further, here are a few more valuable data points to consider:

- **Sponsor History:** Have they spoken as part of a sponsorship? Paid or earned?
- **Energy Levels:** Subjective but valuable—were they dynamic or flat?
- **Content Creation Capabilities:** Can they support blogs, social, or post-event clips?
- **Survey Data & Speaker Ratings**: Pull in post-session surveys or NPS for speaker performance

Impact:

- Ensures balanced use of your speaker pool
- Surfaces emerging or underutilized talent
- Builds continuity across content strategy
- Gives future teams a historical roadmap to work from
- Enables smarter, more strategic programming over time



SESSION BOARD

PART 2

The Case For A Speaker CRM

Why a Tool Like This Is More Important Than Ever?

Most event teams are still managing their speakers with spreadsheets. It's simple. It’s familiar. And... it’s not built for scale.

Despite how critical speakers are to the success of an event, many teams rely on tools like Excel or shared drives to track information—bios, abstracts, headshots, formats, and session history.

In fact, resources like Skift Meetings still offer downloadable speaker spreadsheet templates, underlining how common this approach still is across the industry.

But as your events grow in complexity - and your content becomes a year-round, omni-channel asset - this patchwork of tools creates more problems than it solves:

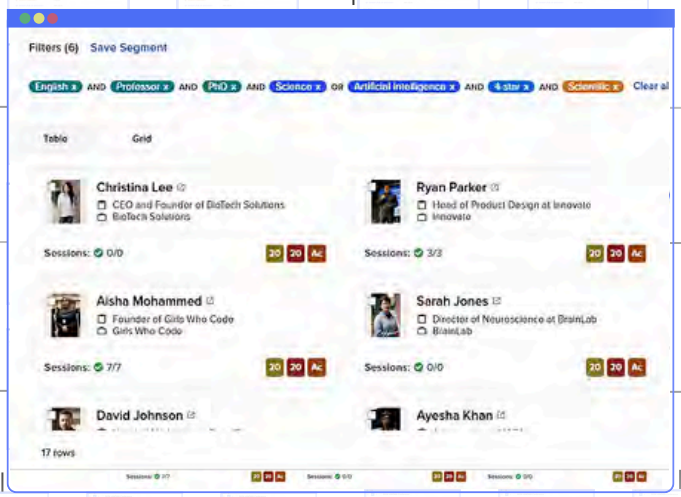
- No single source of truth
- Duplicated effort across teams
- Lost knowledge with team turnover
- Inconsistent speaker quality or experience
- Missed opportunities for deeper engagement



Speakers are no longer just contributors to a single event - they're powerful content partners, brand evangelists, and influence amplifiers. To manage them that way, you need the right infrastructure.

What Is A Speaker CRM?

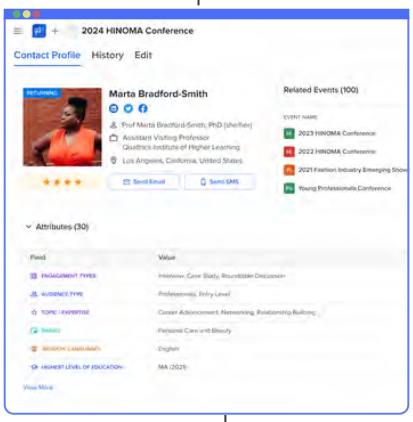
Speaker CRM



Your speakers all in one place (*not in a spreadsheet*).

Search, invite, and activate for your entire event marketing portfolio.

Speaker Profile



Enhance speaker discovery with rich, contextual profiles that are searchable and indexable.

Great for your conference, field events, webinars, case studies, podcasts, and much more.

Tier 1 Events | Field Events | Webinars | Community Events | Podcasts

The Power of a Speaker Database

It’s a strategic asset that fuels your entire event marketing portfolio.

By consolidating speaker data in a platform like Sessionboard, you can:

✅ Save countless hours sourcing and managing speakers
✅ Improve content quality through better matching and speaker fit
✅ Amplify your message via speakers with real influence and reach
✅ Build lasting speaker relationships that strengthen your brand
✅ Generate higher ROI from speaker-driven campaigns

How To Get Executive Buy-In

Your executives care about ROI, efficiency, scalability, and brand reputation. Here’s how to position a Speaker CRM to them:

- **Efficiency Play:** Reduce manual work and duplicated efforts across departments
- **Strategic Advantage:** Be first to market with relevant, high-trust content powered by known experts
- **Risk Reduction:** Avoid poor speaker fits, last-minute scrambles, or overuse of the same voices
- **Revenue Impact:** Tap into speaker influence to drive registration, engagement, and demand gen
- **Cross-Team Leverage:** Turn speakers into year-round content collaborators across webinars, podcasts, case studies, and beyond

11x Higher ROI

from influencer marketing campaigns compared to traditional digital marketing tactics



Nielsen Catalina Solutions

Traditional CRM vs. Speaker CRM

Feature	Sales CRM	Speaker CRM
Tracks Pipeline		
Session and Format Preferences		
Engagement and Speaker Feedback		
Transcripts and Content		
Cross-Functional Coordination		

A Competitive Advantage

If your event content, speaker lineup, and influencer strategy are becoming more important than ever - then your tools should reflect that reality.

A Speaker CRM is your command center for smarter, faster, more effective content programming. And the teams who adopt one now?

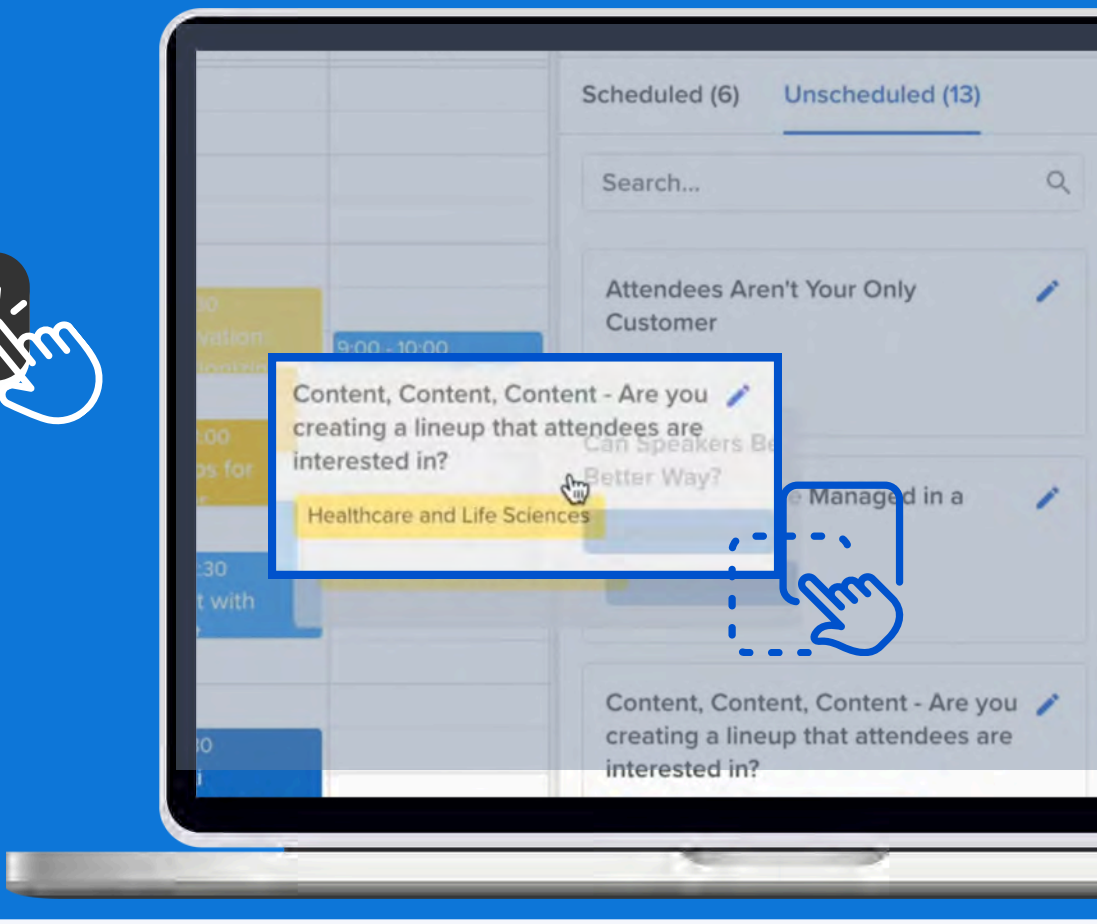
They'll be miles ahead in a year.

SESSION BOARD

Next Generation Speaker and Content Management Platform

Sessionboard's best-in-class platform simplifies speaker selection, session design, and content management, ensuring a seamless event experience from start to finish. Bring your team into harmony with technology and create impactful, memorable events effortlessly.

Schedule A Demo



Trusted by EMERALD ATLASSIAN informa markets Bloomberg CLARION EVENTS

It's time to recognize speakers as the strategic assets they truly are. Invest in a speaker CRM, and you'll unlock a wealth of marketing potential that will drive exponential growth.

That's precisely why we built Sessionboard - a speaker CRM designed to capture, organize, and leverage this invaluable resource. But before we delve into the tool, let's explore the critical data points you should be tracking to maximize your speakers' impact.

If you are ready to learn more about how a Speaker CRM like Sessionboard can help your organization, please reach out to us today.

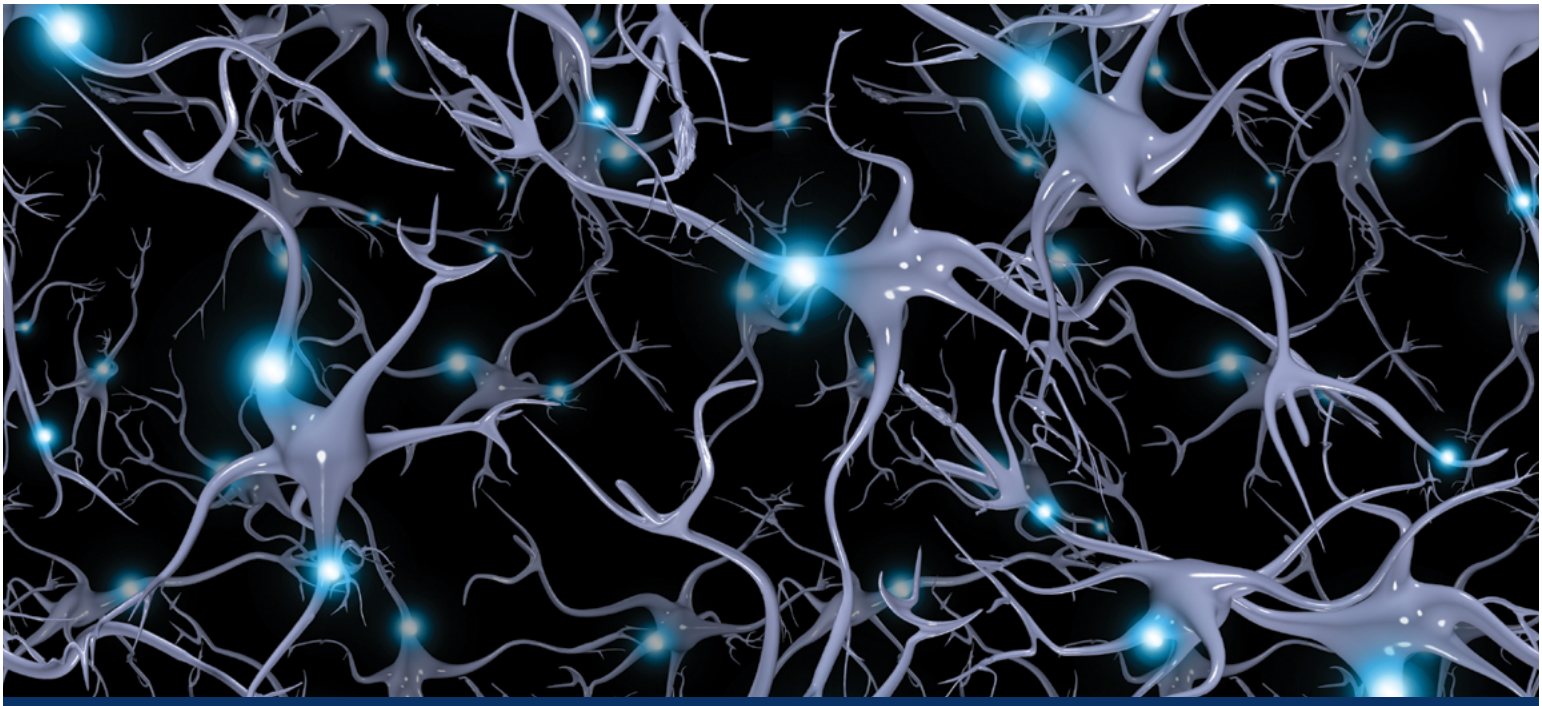
Chris Carver
Co-Founder and CEO

SESSION BOARD



SESSION BOARD

www.sessionboard.com



EASY WAYS TO AVOID COMMON, COSTLY EMAIL MISTAKES

By **Nancy Harhut**
Chief Creative Officer
HBT Marketing
nharhut@hbtmktg.com

HBT
*Driving Engagement with **Science***

Email **Mistakes and Missed Opportunities** Cheat Sheet



- [ ] Have you added brackets/ parentheses to your subject line?
- [ ] Are before and after pictures close together?
- [ ] Are numbers shown as numerals and not spelled out?
- [ ] Can your target choose between offers?
- [ ] Do your coupons have a dashed line border?
- [ ] Can you start a sentence with "because"?
- [ ] Do you focus on your customer more than your product/service?
- [ ] Have you popped "free"?
- [ ] Did you all-cap an important word in your subject line?
- [ ] Can you use Loss Aversion?
- [ ] Have you shown how to avoid overpaying instead of how to save?
- [ ] Can you make your target feel ownership?
- [ ] Did you choose a great testimonial?
- [ ] Have you written a rhyming subject line, headline, or CTA?
- [ ] Is someone proofreading your email?
- [ ] What special occasion/holiday can you leverage?
- [ ] Do prices look small and savings look big?



Want to avoid other mistakes and missed opportunities?

Together we can. Let HBT Marketing create your emails. Or review them. Or train your staff. The choice is yours. And so are the benefits.

Check us out at www.hbtmktg.com

For more information, **email us today at GetInTouch@HBTmktg.com**

HBT

CHEETAH Framework

for Event Marketers



knak.

The CHEETAH Email Framework

for Event Marketers

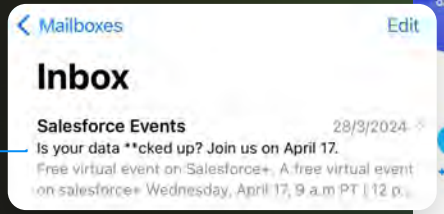


C	H	E	E	T	A	H
CAPTIVATE	**HUMAN**	**ENTERTAIN**	**EASY**	**TRANSITIONS**	**ANIMATE**	**HARMONY**
You only get one shot, one opportunity.	Are you writing in authentic language like a human?	Who said email has to be boring?	Define the GOAL – what do you want them to do?	Get creative with the transitions in your emails.	Helps to stand out, be different – catch attention.	Are your emails and landing pages consistent?

Taking your emails from “meh” to “amehzing”

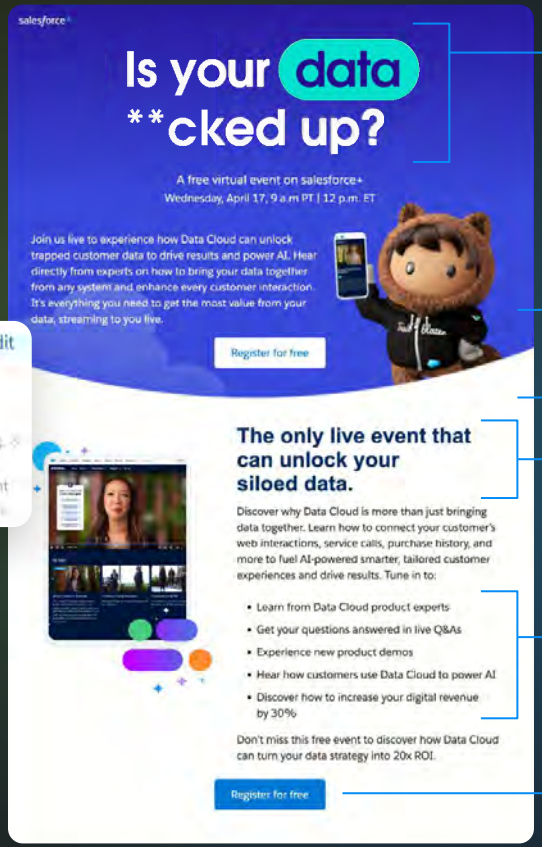
k.

CHEETAH
Email Example



C: CAPTIVATE
E: ENTERTAIN

Stands out in the inbox by being familiar, funny, and unexpected; is Salesforce swearing!?



E: ENTERTAIN
A: ANIMATE

Sweary asterisks revealed to be a clever trick in an animated GIF.

T: TRANSITION

Nice curved visual.

H: HUMAN

Copy is making it about the recipient, not the sender, by clearly stating what the webinar can do for them, and what value it will provide.

+ ALL ABOUT THEM!

All points are about the benefits to the recipient.

E: EASY
H: HARMONY

One single and clear goal: one CTA, repeated that links to an on-brand campaign landing page.

C CAPTIVATE

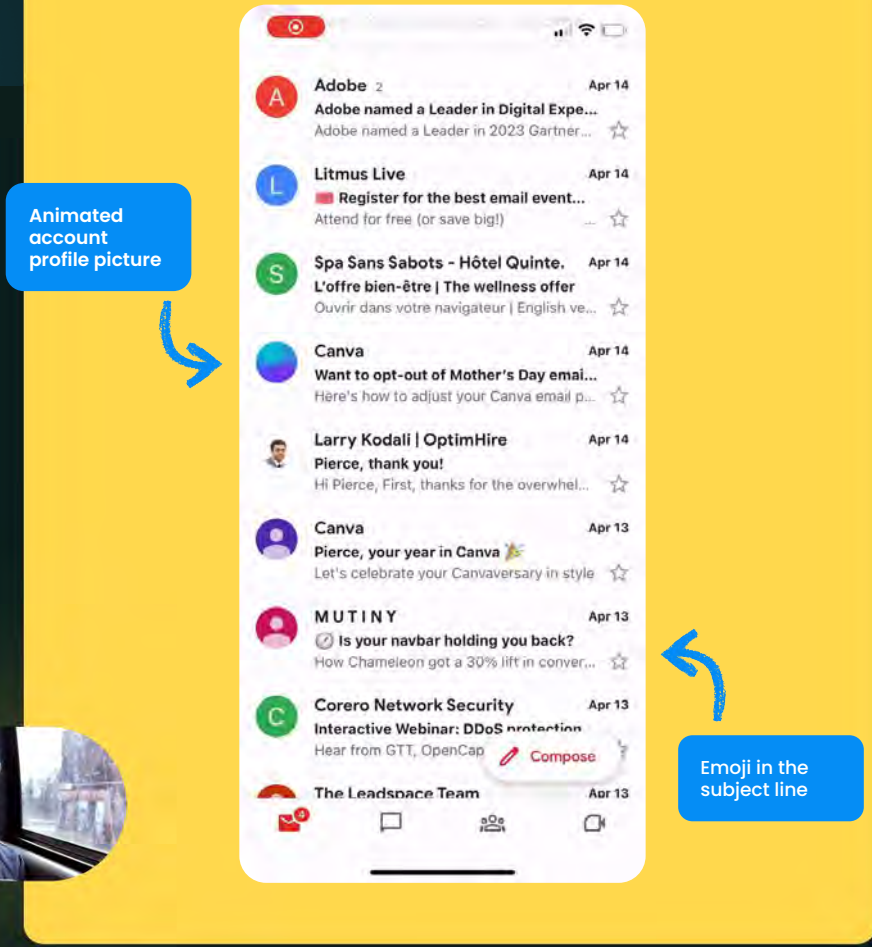
You only get one shot, one opportunity.

Are you dropping bombs with your sender display name, subject line, and preview text?

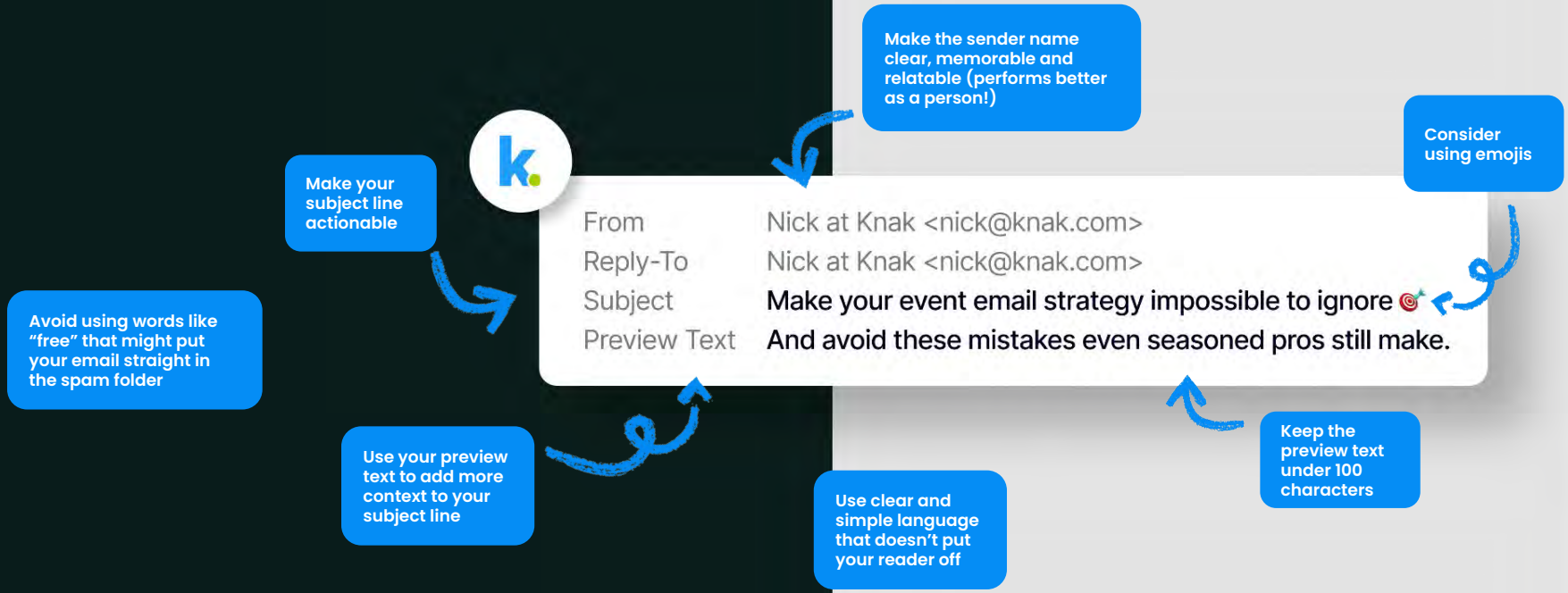
Are you gonna use emojis to capture it or just let it slip?

Opens are half the battle. Success is the only option.





KICK-ASS
FIRST IMPRESSIONS



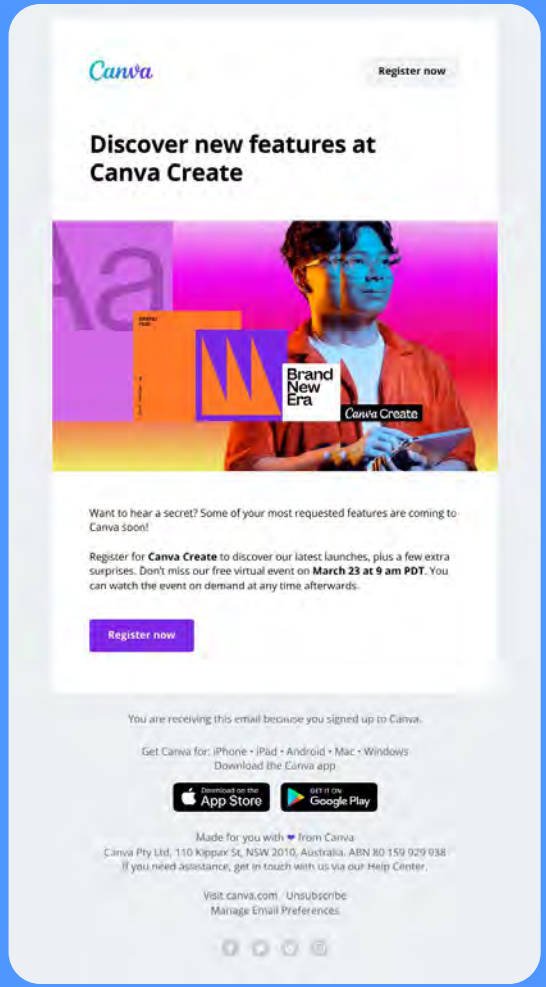
H HUMAN

Are you writing in authentic language like a human?

Does your email feel like its coming from a person or a big, faceless company?

1-person email trick for writing.

Pick someone you know in your email list, and write as if you are sending them a 1-to-1 email.



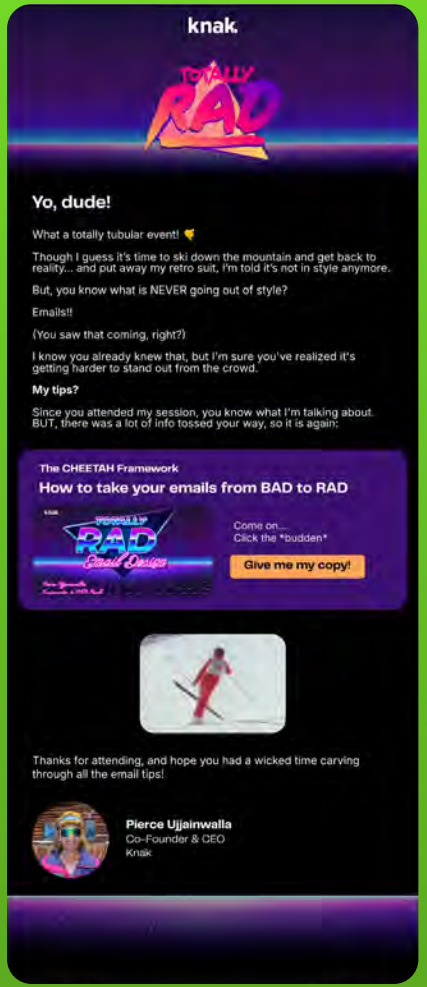
E ENTERTAIN

Who said email has to be boring?

Does it make someone laugh?

Edu-tainment is effective.

Take some risks.

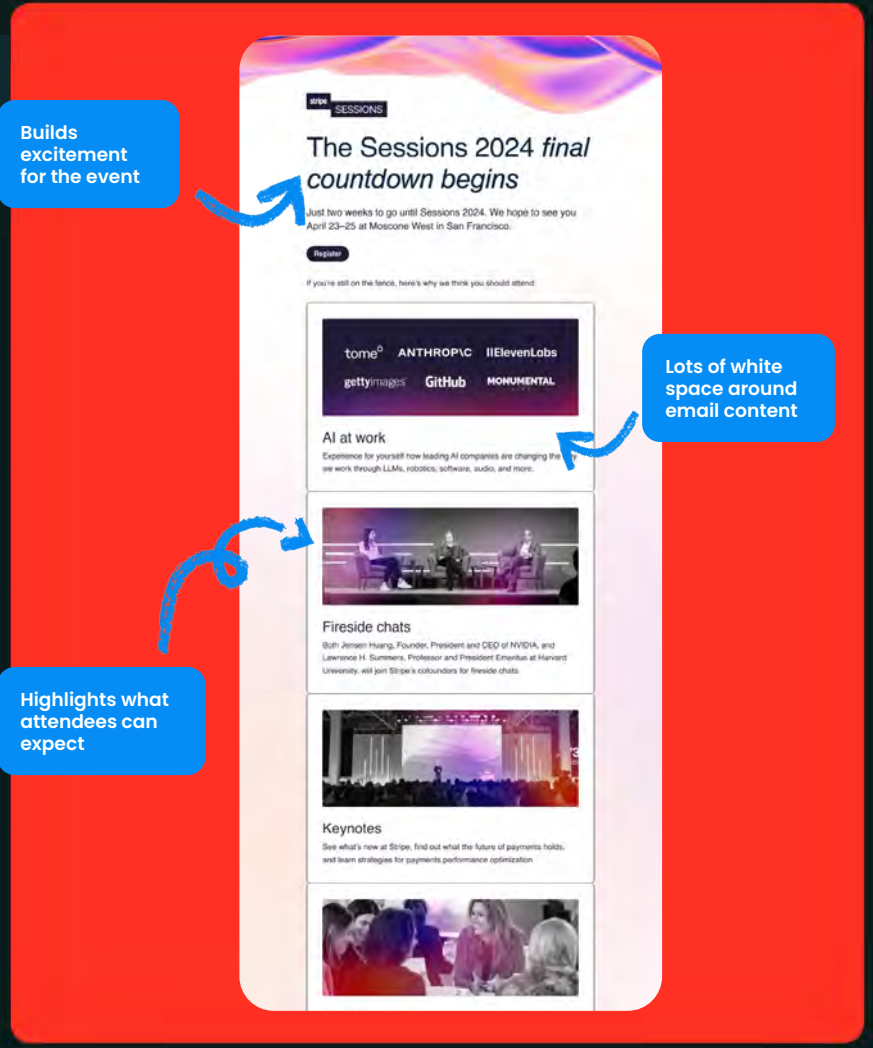


E EASY

Define the GOAL - what do you want them to do?

Choose a single Call-to-Action (CTA) and focus on it.

Make it easy to read (readable.com).

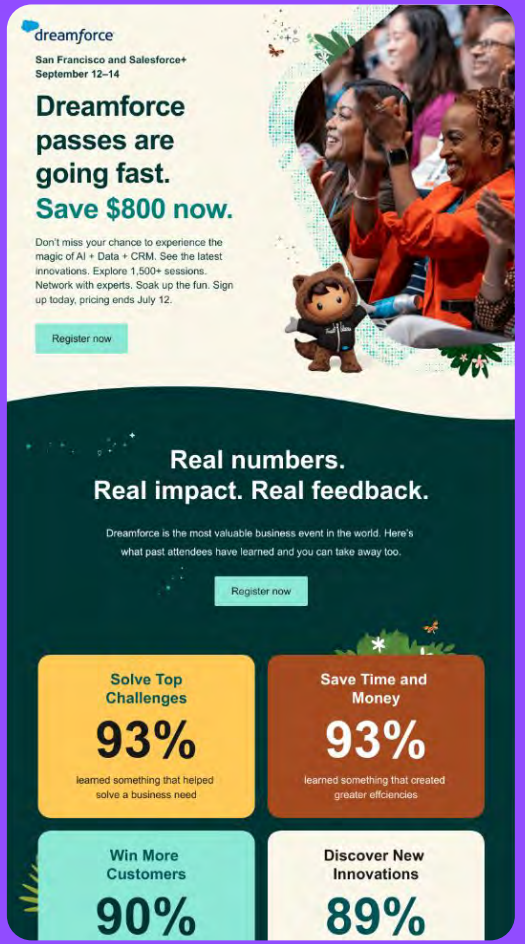


TRANSITIONS

Get creative with the transitions in your emails.

No one said every section needed a straight line across it.

It's just another image to add!



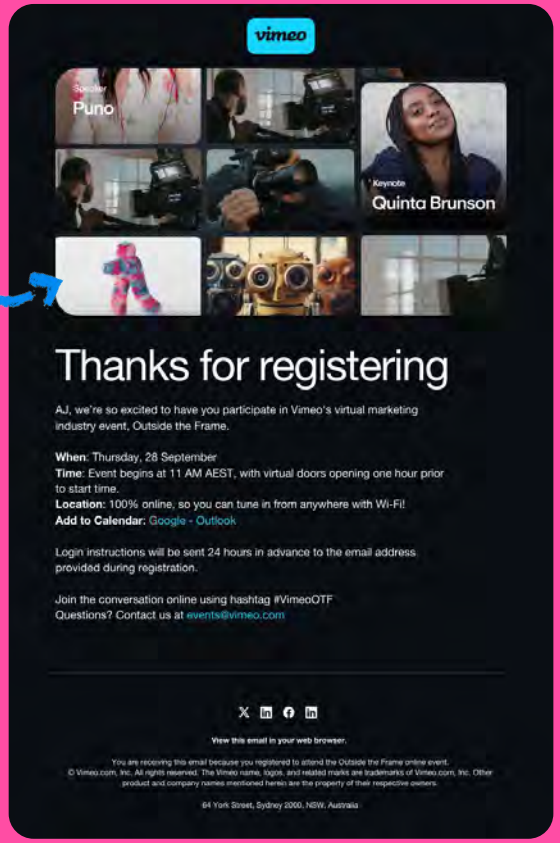
A ANIMATE

Helps to stand out, be different — catch attention.

Try to be subtle with the animations, not overly distracting.

EZGIF.com to make GIFs (watch the size).

Captivating GIF with image roll animation

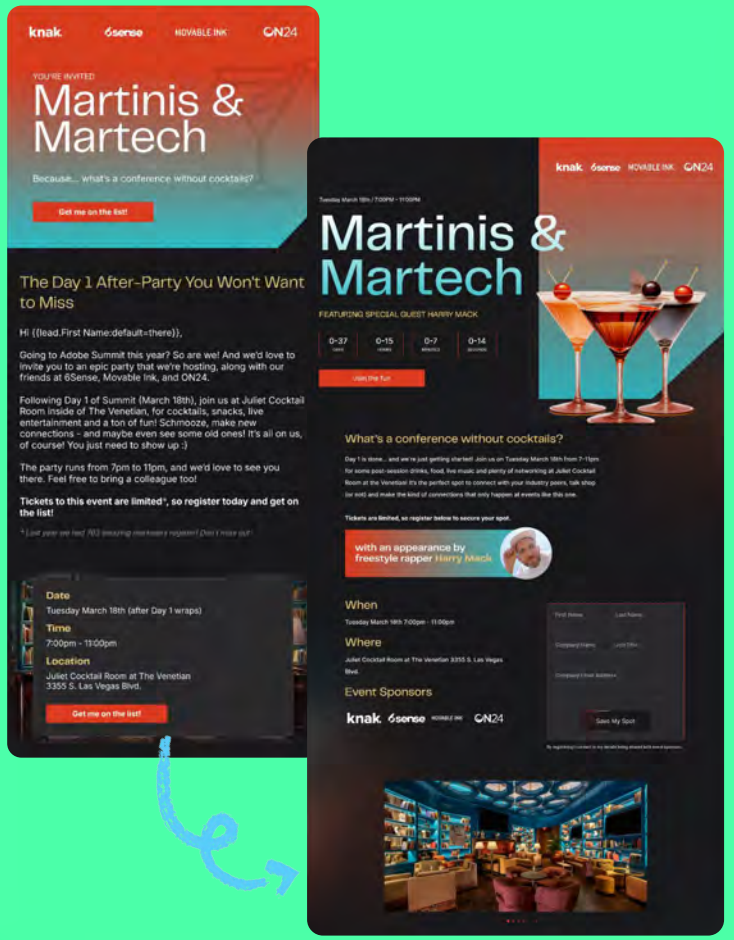


HARMONY

Are your emails and landing pages consistent?

Your email should hook and your landing page should convert.

Do you make it easy for your prospects/ customers to convert?



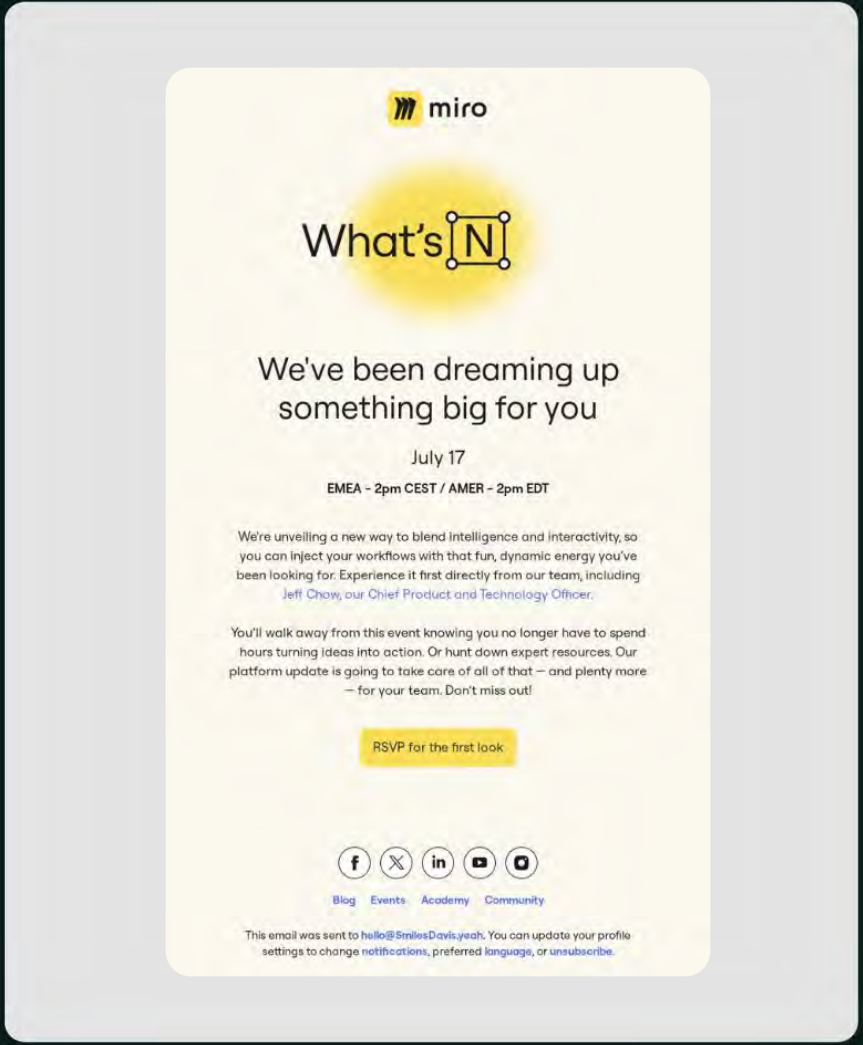
Top Tip

Valuable

Most important thing that is often overlooked

No one cares about your event, your webinar, or your website. They care about what's in it for them.

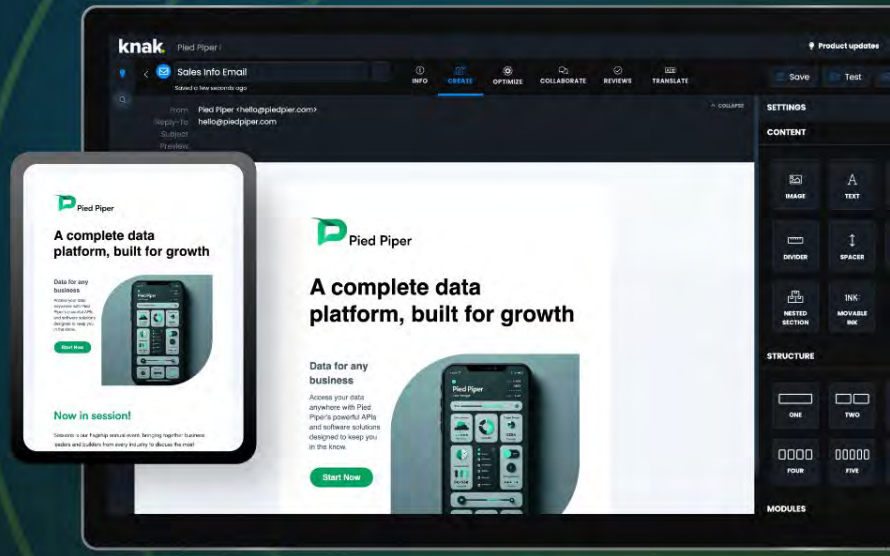
Make it valuable... **to them!**



Don’t lose your creative vision while waiting on developers.

Learn how anyone can create beautiful emails and landing pages with Knak.

Explore **knak.com**



eventmobi

Event Technology Buyer's Guide



Reigniting Audience Engagement Through Events

Events play a critical role in your organization's ability to engage attendees, earn revenue, and achieve your goals. But in recent years, some organizations have seen their audience become more protective of their schedules, prompting efforts to craft memorable event experiences that motivate attendees to participate.

For some organizations, this means potentially shortening their 4-day conferences into 3 value-packed days, sometimes even less. Others are putting extra effort into understanding how they can engage attendees year-round, adding educational sessions to earn CE credits or other certifications, and creating experiences and networking opportunities that can't be replicated. So what does this mean for your organization? How you engage your attendees through events is more important than ever. You know that event technology can create better experiences for your attendees – but there are quite a few challenges to finding the perfect solution.

Before publishing this guide, the EventMobi team commissioned 20 qualitative interviews with event professionals to better understand their challenges. These challenges may be unique to each of their industries, but common among all event professionals. Their firsthand experiences and advice shaped the contents of this guide – identifying the 4 most time-consuming steps of buying event technology:



Understanding the full range of products and features available and figuring out which are most relevant to their attendees and events



Navigating the lengthy due diligence process of re-evaluating technology partners every year.



Comparing pricing models to understand exactly what's included and what's not.



Learning how to use a new event platform to design and customize the perfect experience.

This guide will walk you through how to choose the right event technology for your organization based on your goals, challenges, and budget.

Looking for an event platform that's as powerful as it is flexible? See EventMobi in action.

Watch the Product Tour

What You'll Find in This Guide

Buying event technology can be overwhelming. There are so many vendors, products, and technical features to sift through. Depending on how far along you are in the buying process, you've likely encountered more options than you thought possible.

Whether you've purchased event management software in the past and it didn't meet your expectations, you're going through your annual due diligence, or you're a first-time buyer, it can be hard to know where to start.

This guide provides you with the essential information you need when buying event technology, along with an overview of the features and services most relevant to your organization.

Best of all, it includes tons of first-hand advice from real conversations with event professionals, like you.

They share insights on what you should look for in an event technology partner, buying mistakes to avoid, and key questions to ask your potential vendors.



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What is Event Technology?

When you're looking for event technology, it's not just about choosing a Mobile Event App vendor. There's an entire landscape of event technology products that can help you run events more smoothly and elevate the attendee experience before, during, and after.

Event technology encompasses everything from your registration website, badging solution, and lead capture tools for your sponsors, and more.

Of course, at the core of your event is your Event App - and that's what the research in this guide focuses on - but it's important to consider how different event technology solutions complement each other. To help you make an informed buying decision, we've listed the full range of event technology products below:

Common Event Technology Products	How You Can Use It
Event Website and Registration	EventMobi's website and registration platform offers a seamless registration experience and is fully integrated with the event management platform, so your data is automatically synced.
Event Check-in Tools	EventMobi offers an event and session check-in solution to effortlessly manage attendee arrivals and prevent long lineups.
Badging Solutions	EventMobi's badging solutions make it easy to design and print ready-to-wear badges for your events–even without design experience!
Mobile Event Apps	EventMobi offers a customizable Mobile Event App experience with content, networking, engagement, and navigation for any type or size of event.
Live Display	EventMobi offers dynamic digital displays to highlight key information for attendees and amplify engagement.
Virtual Event Capabilities	EventMobi goes beyond basic online events and offers a premium hybrid-ready platform —including a video library, on-demand sessions, remote access, and more.
Lead Capture	EventMobi's Lead Capture App makes it easy for sponsors to create valuable new connections. Sponsors simply scan attendee badges to capture information for post-event follow-up.

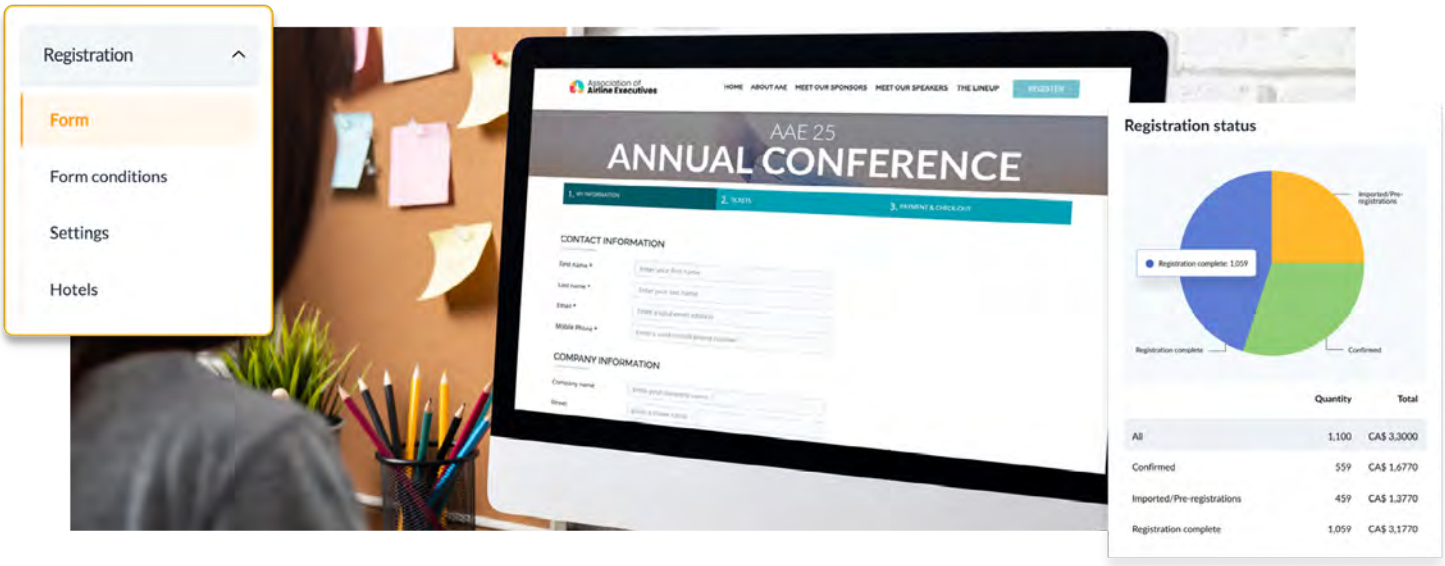
Questions to Ask Before Selecting Your Event Technology Partner

Curious about how other event professionals choose event technology vendors? To make your research process as easy as possible, this section compiles the most important questions to ask when exploring technology requirements for your events. You'll also get to see what other event planners shared about their experiences using EventMobi.

"Does your platform include event registration?"

Asking this question will save you a lot of time and frustration down the road–especially given the recent rise in last-minute signups. If your registration platform has an integration with your event platform, then all of your registrant data will automatically sync with your other management tools.

Online Event Registration: A seamless registration experience makes it easy for attendees to sign up for your event, letting them know they're in for a well-organized experience–while also making it easier for you to collect payments and manage attendee data.



Event Planners Reflect on their Experiences

"Our previous [event platform] was meant to speak with our registration but [...] it just wasn't user-friendly"

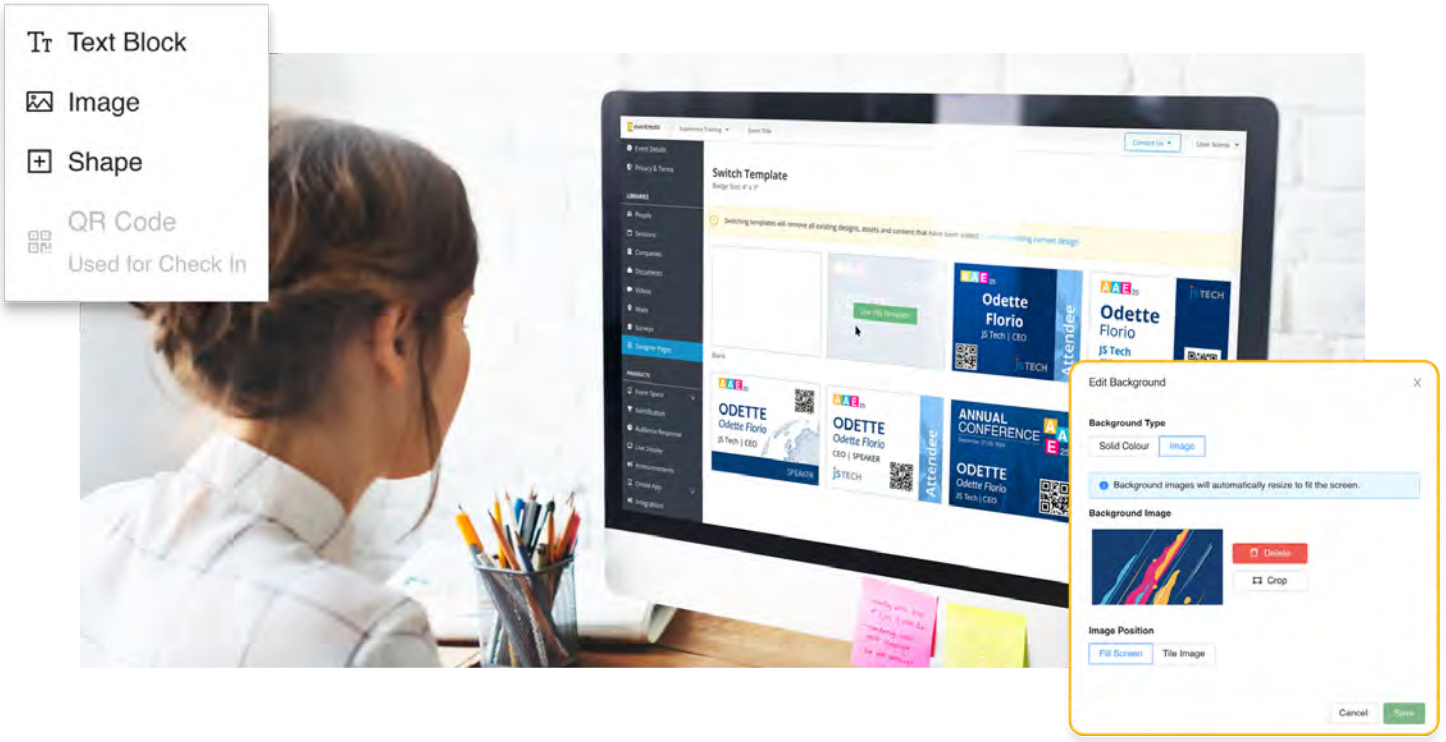
"With our previous vendor, their system was not as user-friendly as they made it seem. It was meant to speak with our registration system but our attendees didn't find it that easy to work with. The registration thing was a big deal because it just wasn't user-friendly for attendees to access it."

— Event Coordinator, Dental Care Association

“Does your solution handle badge design and/or printing?”

Designing and printing badges for your events can take a ton of effort if you don’t have the right tools. That’s why it’s important to look for an event management platform that offers badge design software and/or printing solutions.

Badge Designing and Printing: Easy drag-and-drop badge design is the best way to go. For simplicity, look for solutions that sync with your registration platform so you can efficiently create custom badges for different groups.



With EventMobi’s all-in-one event management software, it’s easy to customize your badge designs and choose the printing solution that suits your event goals, size, and budget. To save additional time and effort, you can order Pre-Printed Badges in just 3 clicks and get your laminated, ready-to- wear badges delivered to your venue in just 5 business days.

Event Planners Reflect on Their Experiences

“Onsite badge printing saves time, energy, and your sanity.”

“I would say it's impossible to lose with onsite badge printing. It will save you time and energy and mental well-being. If you do it on site, you get that extra help with the event support person or the event badge printer support on site, and then there's opportunities for you to make up that money elsewhere, whether again in your time, there's opportunities, new opportunities to sponsor badges or lanyards or logos or just the kiosks themselves often have sponsorship opportunities. So you really could make up your money if money is the issue, if you're deciding whether or not to go with onsite badge printing.”

— Hannah Gomes, Community and Events Manager, INFRA

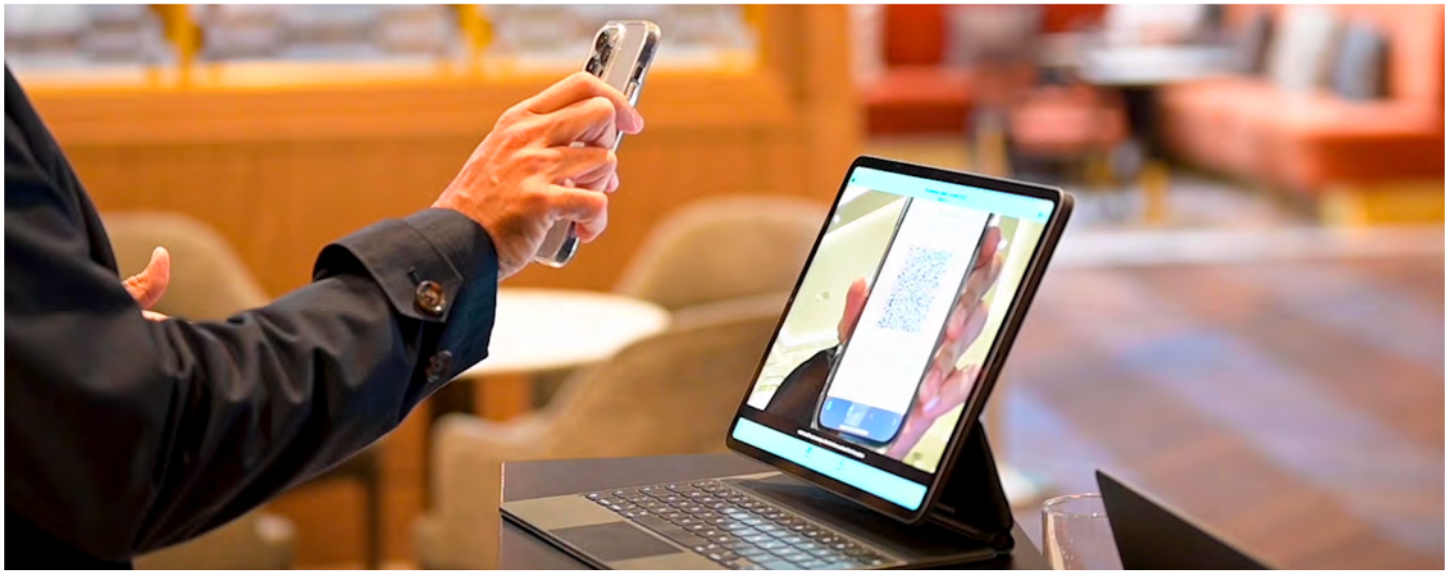
“How will we track event and session attendance for awarding CE credits?”

Another important consideration for event professionals is how accurate attendance tracking —for awarding CE credits, proving ROI to sponsors, and improving future programming. Manual check-in may work for smaller events; however, it doesn’t scale well as attendee numbers grow. Fortunately, event technology can both improve and simplify this process.

QR Code Check-in: All it takes is a quick badge scan to track attendance. This can drastically reduce waiting times and give your event a modern vibe right from the get-go.

Session Tracking: Need visibility on attendee participation? Offering continuing education (CE) credits, or certifications? Capture who attended which sessions, when they arrived, and how long they stayed—ideal for CE credit validation, certification, and engagement analysis.

Detailed Analytics: Inform future programming decisions based on session popularity. Using a Check-in App for your event and sessions gives you insights into attendee preferences that can help with future event planning.



Event Planners Reflect on Their Experiences

“It was a huge step for us, but I love the way that it worked”

“The automated check-in with QR codes on the badges worked! It was our first time trying it and it was a huge step up for us, but I love the way that it worked. There are so many things about it that are great from our point of view”.

— Event Coordinator, Dental Care Association

“Will our attendees find this event technology easy to use?”

When introducing any new event technology to your attendees, adoption should be your first goal–and this often comes down to ease of use. You want your event app to be simple enough for non-tech-savvy attendees to navigate, but with a modern look and feel that’s enjoyable for all attendees.

When transitioning from a paper guide to an Event App, there can be an adjustment period for attendees who are used to relying on a printed guide or brochure. It can take a moment for your audience to get comfortable with a new event platform, but choosing user-friendly technology allows your attendees to quickly get their bearings.



Event Planners Reflect on Their Experiences

"It's easy for the attendees to find and just right there in your hand or on your screen."

“This app is so easy to use on my end. I'm the only one in my office who uses it. I do the entire thing, all the programming and the coding and the coloring and anything. It is so easy to use. But it takes so much less time than preparing other materials, and it's easy for the attendees to find and just right there in your hand or on your screen, you know, you're not having to flip through what page was assigned.”

— Elizabeth Slogar, Operations and Finance Manager, The Menopause Society

Event Planners Reflect on Their Experiences

"The event app absolutely enhanced the attendee experience."

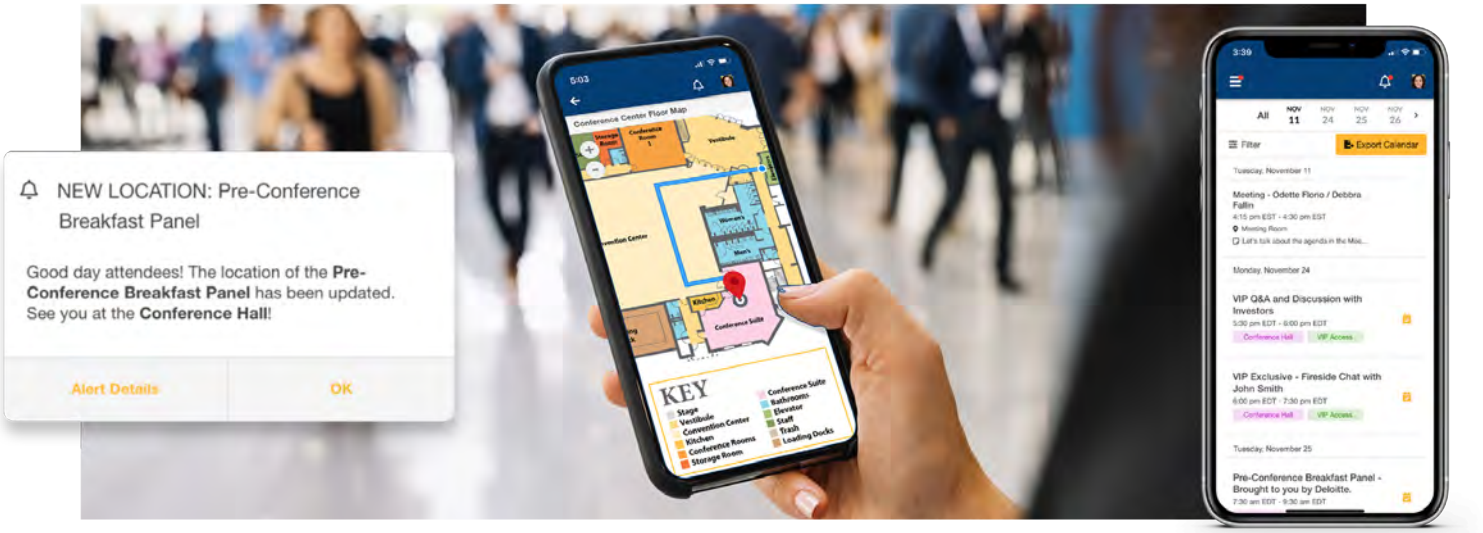
"The experience became interactive because they were able to participate, rather than just passively attend the event. And working with the EventMobi team was as seamless as using the app."

— Carrie Jackson, Director of Sales, Groups & Events, Cineplex

"How do we ensure attendees are in the right place at the right time?"

With a printed event guide, there's no way to update it to accommodate changes to the schedule, speakers or other sudden changes. With an event management platform, it is flexible and easy to update on the fly. This allows you to communicate last-minute changes and ensures your attendees always know where to go and how to find their next session.

- **Personalized Agenda:** A scheduling feature that enables attendees to flag the event agenda items that they'd like to attend.
- **Interactive Maps:** Event maps with pinpoints to highlight precise locations make it easy for attendees to find registration, their next session, or a specific sponsor at a trade show.
- **Push Notifications:** Push notifications are announcements that planners can send to anyone with the app installed on their phone. Attendees will receive notifications even if the app isn't open. This can be great for notifying attendees of any last-minute updates about sessions, locations, speakers, or other changes to the agenda.



Event Planners Reflect on Their Experiences

"We really wanted to increase attendee engagement."

'Having the personalized agenda pre-populated with data gathered during the event registration stage, and the polling and survey features all in one easy tool, was the most important part to us. So, ultimately that's why we decided to go with EventMobi."

— Laine Vella, Event Manager, Pri-Med Canada

"Hey, come here and learn about this."

"It really helps both my team and our exhibitors to send out push notifications, because when our exhibitors have special events, meals, or product theaters, they can send out these special announcements and say, 'Hey, come here and learn about this.'"

— Content and Innovation Manager, Health Care Association

"Being able to save time, whether it means not juggling spreadsheets..."

"...or being able to adjust the schedule on the fly, and being able to communicate with people without having to run out into the hall and shout updates makes it both a less stressful experience for us as planners, and for the attendees."

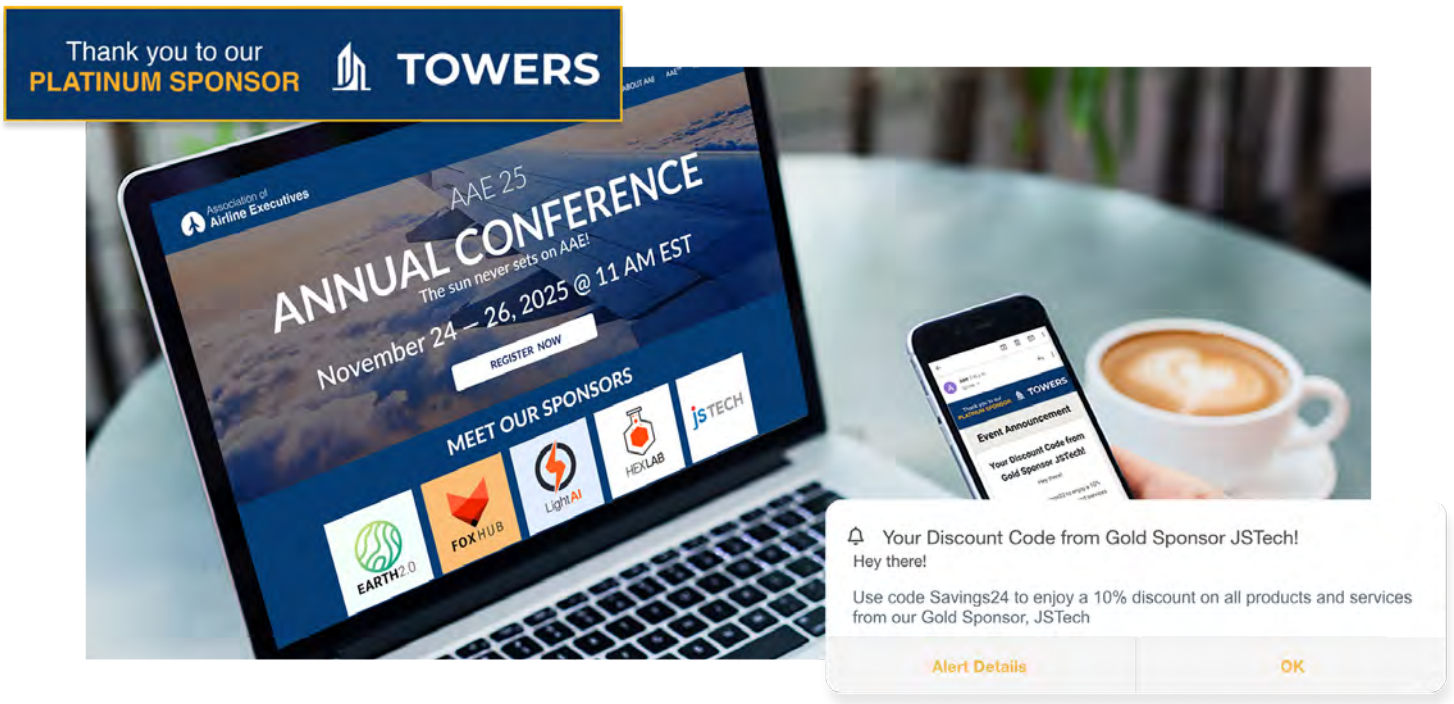
— Daniel Favand, Community Engagement & Website Support, Venture Out

"How do I provide the most value to sponsors?"

Depending on the needs of your sponsors (and your event), you can build tiered sponsorship packages around your event technology.

Here are a few ways you can create valuable exposure opportunities for sponsors:

- Before the event, **include the sponsor's logo on your registration page** and in any marketing communications promoting the event, such as registration invite emails.
- Enable sponsors to **create a dedicated profile in your event platform**, including their logo, documents for download, links to their website and more.
- **Offer sponsored video libraries** with curated content from top-tier sponsors.
- **Enable sponsors to set up dedicated in-app exhibitor booths** with videos, documents, and calls-to-action.
- During the event, **highlight sponsors' logos on the app homepage** as "Featured Sponsors".
- **Create sponsored gamification challenges** to drive onsite engagement with sponsors.
- Set sponsors up to send targeted alerts or push notifications with **a special branded message to attendees**.



Event Planners Reflect on Their Experiences

“Conferences like this are expensive–we need to provide value to sponsors”

“Anything we can do to help our sponsors see the value in engaging with the conference helps us to be able to provide more scholarships to healthcare providers and make more connections with people who really need this education.

That was a big factor for us in making sure that the conference is providing value not only to the attendees but also to the people who are helping to financially support it. Conferences like this are expensive.”

— Content and Innovation Manager, Health Care Association

"The gamification really drove traffic to our exhibitor booths."

“The planners were really into it and (used it to) figure out where they needed to go, who they needed to talk to and how they needed to get that code. So I think it was a win-win.”

— Arlene Schilke, CMP, DES, Executive Producer, GO WEST 23

EventMobi can help you to deliver more value to your attendees and sponsors. Book your demo to find out more!

Book a Demo

“Does this solution work well with our existing technology?”

Finally, as you are doing your research, it is crucial to ask vendors how their solution fits with the current technology you use at your organization.

EventMobi easily integrates with a range of technology, including:

- Registration platforms (like Aventri and Cvent)
- CRM systems (like Salesforce)
- Association management software (like WildApricot, YourMembership, iMIS)

If you don’t see your system on this list, please ask your EventMobi sales partner about custom integration.

A Note About Open API:

Custom integrations require more advanced IT skills, but EventMobi’s Open API is responsive, easy to understand, and well-documented. There’s no additional charge for API access. Click here to access EventMobi’s public API to share with your developers.

Firsthand Buying Tips & Common Mistakes to Avoid

Learn from the advice of other event planners, so you can avoid these common buying mistakes:

Don’t overlook the importance of reliable customer service.

“When we worked with [our previous vendor], I would say the biggest challenge was their customer service. It was kind of hard to get a hold of them when we had issues.”

— Tech Coordinator, Language Association

Do prioritize vendors who offer support channels that match your preference.

"I would say the biggest benefit of using EventMobi is the support."

"[Our EventMobi Event Specialist] was really knowledgeable and quick. A lot of things are time-sensitive if something goes wrong, and she was there every time. She was also a great resource for creative ideas on how to best use the app to achieve our event goals."

— Rachel Lyon, Manager, Conference & Events, CSAE

Do ask about training materials.

"I did a lot of research, and they sent me links so that I could watch training videos. And honestly, I just would watch the video, pause it, and then start inputting all the information. And then if I got really stuck, I would contact EventMobi."

— Event Coordinator, Dental Care Association

Don't wait until the last moment to select your vendor.

But if your decision does come down to the wire, make sure the solution supports automated data uploads!

"For our first experience, we chose EventMobi a month before the event. So it was a very tight turnaround. I loved being able to directly upload the lists and the schedule and pieces like that in the Excel file. It was very seamless and very easy. The tight turnaround was the hardest part. But the user experience for creating the app was great across the board."

— Communications Specialist, Leadership Development Association



Planning Your Transition to an Event App

Transitioning to an Event App doesn't have to be an ordeal. Our event planning partners have tips to make the change a breeze:

Do consider phasing out your physical guide gradually.

"At earlier events this year, people could pick up a copy of the program if they wanted to onsite, but otherwise, they would use the app. But this past event, if they wanted the information they had to use the app."

— Conference Organizer, Academic Association

Don't underestimate your attendees' ability to adapt.

"This was a difficult decision. The board was very nervous about it but they also wanted to avoid the cost of mailing out 300 program books–it all boils down to money! The decision was driven by finance, but ultimately ended up being a good thing because it got everyone onto the app."

— Conference Organizer, Academic Association

Do consider going completely paperless to avoid stressful, last-minute changes.

"How can an event app and a printed guide work together?"

"If you decide to create a hardcopy guide in addition to the event app, save yourself some hassle and use it mainly to share high-level information while directing attendees to the app for the logistical details. That way, minor changes to your program won't require a reprint.

— Event Manager, Meeting Expectations

"We used to print what would be a 35-page booklet for a 3-day event, which is honestly too much. And it doesn't serve the purpose the way that an Event App can. So I think it was mostly just the ease of access.

— Programs Assistant, Academic Association



How to Talk About Pricing with Your Vendor

Budgeting for event technology is a significant factor in the buying decision. But it can be difficult to get a clear picture of exactly how much your solution will cost and what's included.

Some solutions are expensive and include a lot of features you might not take advantage of. Others might seem affordable at first, but the cost of add-ons increases the total solution. And some are actually cheap but include very few features of value to an event.

Determine Your Requirements and Non-Negotiables

First, ask yourself these questions to help determine your requirements

1. Do you run one or multiple events per year?
2. How many attendees total will need user profiles in the app (including exhibitors)?
3. Review the list of platform features. Which features are critical to you?
4. Review the list of add-ons and decide how many you will require. More users? Registration? Virtual event package? White-labeling?
5. Will you need access to the Event App for longer than a few weeks after your event?

Uncover Potential Hidden Costs

Then, as you are having pricing conversations with vendors, ask the following questions to uncover any potentially hidden costs:

- What exactly is included in this package?
- What isn't included? Are there popular add-ons that must be purchased separately?
- What kind of support and training do you provide?
- Are there limitations on the number of push notifications we can send?
- Are there limitations on the number of polling questions?
- Do you offer discounts for multiple events or multi-year contracts?
- How long can we access the event platform after the event?
- What features do associations of our size tend to use?
- Are there limitations on the number of users (attendees, speakers, sponsors, etc.)?

Whether you run one major conference each year or a dozen smaller events, EventMobi offers flexible packages. Contact us and we'll walk you through pricing on a call.

Get in Touch

Why Partner with EventMobi for All Your Event Technology Needs

Why work with EventMobi? Here are a few reasons event planners choose EventMobi as their event technology partner:

Per-Year Pricing

If you're like most event organizers, you run more than just an annual conference. With EventMobi's Per-Year Pricing Package, you can manage all of your events, big and small–from internal kick-off meetings to large-scale conferences.

Why Choose Per-Year Pricing?	
Save time budgeting, researching, and negotiating event technology contracts with new vendors every year.	Cut through the red tape and gain the freedom to run as many events as you want, within your user parameters.
Save energy that would be spent learning how to create a new Event App with a different vendor each year.	Duplicate the basics of your Event App across multiple events, saving onboarding and build time.
Streamline how you communicate with attendees by managing all of your event details and updates from one platform.	Help attendees stay organized with access to key event content in one single, mobile- optimized platform.
Easily create as many events as you need without additional fees.	Open back-end, partitioned access to your team attendees. Enable stakeholders within your organization to build Event Apps at no extra charge.



Easy-to-Use Experience Manager

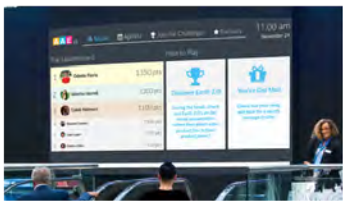
EventMobi empowers organizers to offer better experiences to their attendees by prioritizing an easy-to-use, reliable event management software. The highly intuitive Experience Manager–used by planners to build and manage their event technology–also includes access to badging, event analytics, a virtual event platform, and more.

End-to-End Event Management

Working with a single partner to address all your event technology needs helps simplify vendor management and comes with cost and time efficiencies for you and your team.

EventMobi offers associations a full suite of products, including:





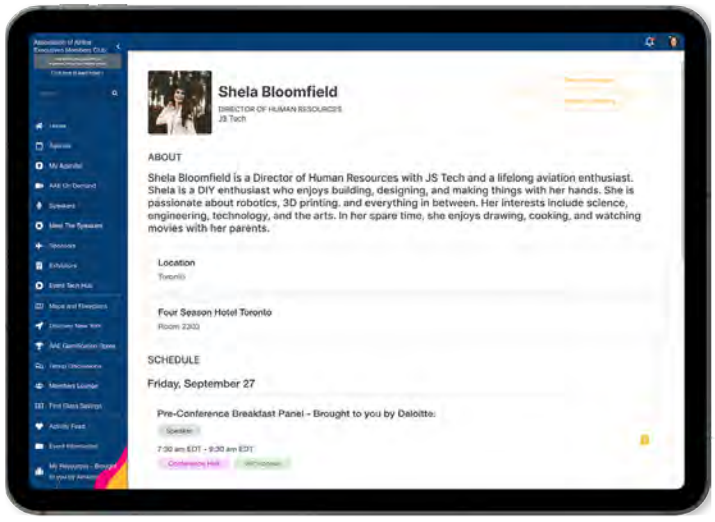




- Website & Registration
- Badge Design and Printing
- Event and Session Check-in
- Exhibitor Lead Capture
- Mobile Event Apps
- Live Display
- Virtual Events Platform

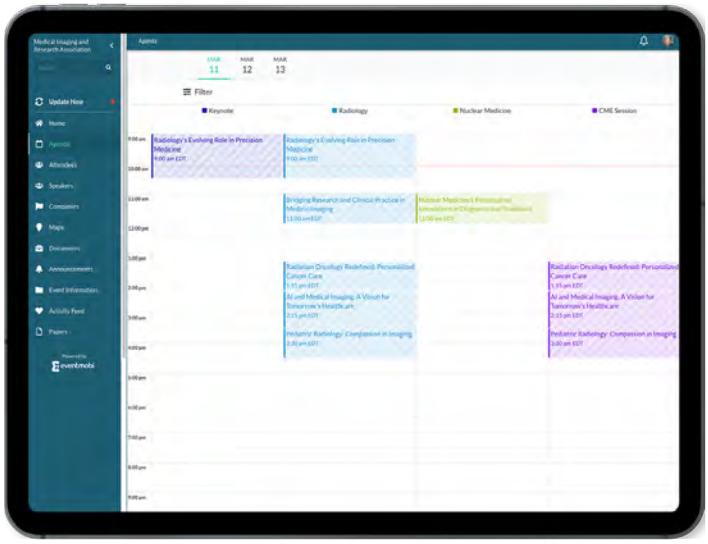
Flexibility for Any Type of Event

From annual conferences and seminars to internal meetings, sales kick-offs, incentive trips, and award ceremonies, EventMobi allows you to customize your event platform for any type of experience.Here are a few examples:



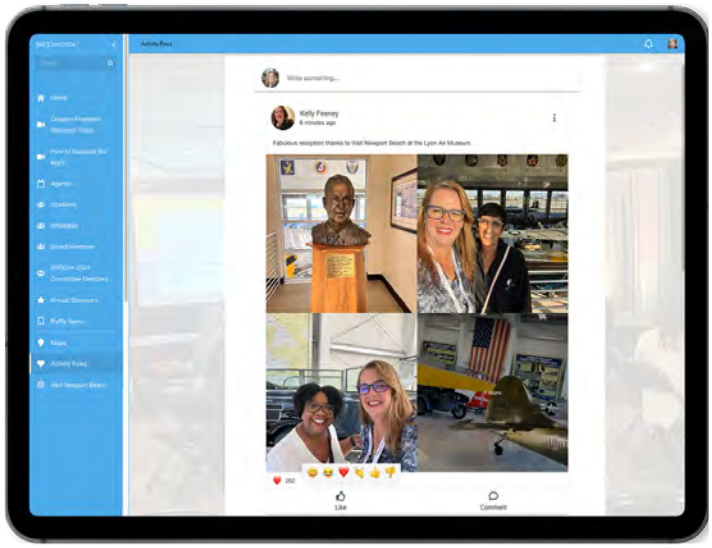
Annual Conference

Whether you are focused on healthcare, technology, education, or any other field, the purpose of an annual conference is to share knowledge, discuss key issues, network and collaborate. For an annual conference, you'll want to leverage EventMobi features like Personalized Agendas, Speaker Profiles, and 1:1 Messages.



Seminar

When you're running a seminar on a specific topic or theme, your goal is to facilitate in-depth discussions, learning, and interactions among participants. Whether this includes lectures, panel discussions, or workshops, your event platform should include an up-to-date Agenda, so attendees can see which workshops they're joining and who's hosting them.



Internal Meetings

Internal meetings serve as a platform for participants to connect, discuss relevant issues, share knowledge, and engages in activities that align with the goals and objectives of the larger organization.

In addition to a detailed agenda, internal meetings can benefit from networking features like Group Discussions, Activity Feed, and Gamification.

Amazing Support for All of Your Event Technology

When you partner with EventMobi, you get 24/7 access to support and training resources to get your event technology up and running:

- **Resource Center:** Access to our library of online training videos, resources, and articles on best practices.
- **Weekly Training:** Learn how to set up your event tech with a live expert.
- **Setup Consultation Call:** An Event Success Manager will help you chart the best setup to achieve your goals.
- **Post-Event Debrief:** Review your event analytics to prove ROI and plan how to improve your next event.



Take the Next Step in Your Event Technology Research

We'd love to hear about your events program and help you find the best solution. Get in touch with the EventMobi team today and we'll walk you through pricing, answer your questions, and set you up with a free demo.

Get in Touch

About EventMobi

Since 2009, EventMobi's comprehensive feature set and elegant simplicity have been loved by 30,000+ planners and millions of attendees. EventMobi has powered events for top brands like Visa and TD Bank, and associations including the American Political Science Association and International Society for Heart and Lung Transplantations. One of the industry's first Mobile Event App platforms, EventMobi's comprehensive suite of event management tools now includes Registration, Check-in, Lead Capture, and Badge Design and Printing. Flexible pricing options, award-winning customer support, and a complete range of production services make EventMobi the preferred choice for organizers of meetings and conferences that demand high attendee engagement.

eventmobi

vFAIRS

12 Best Practices to Launch an In-person Event App Your Attendees Will Actually Use





Are you adding an event app to your tech stack simply because it's trendy?

Let's take a few steps back and rethink your approach.

Instead of treating it as a fancy accessory that's forgotten by 60% of your onsite attendees, convert it into an interactive tool they can't imagine attending the event without.

Event apps that take your attendees on a journey from finding areas within the venue to interacting with the event are non-negotiable.

But, how do you design an app that meets attendees where they are in their event journey and delivers what they are looking for and more?

Simple:

- Stop treating your apps as a tech gadget.
- Start thinking about attendee expectations, needs, and your event goals.
- Map these to the onsite attendee journey.
- Deliver while keeping the optimal attendee experience in mind.

This guide serves up practical tips for designing an in-person event app that your attendees would actually LOVE using.

Get easy-to-use frameworks, real-world success stories, and expert insights across the entire event lifecycle - from pre-event planning through post-event engagement. Each section includes concrete strategies, implementation checklists, and AI prompts to accelerate your planning.

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PRE-EVENT PHASE

BUILD A SOLID FOUNDATION

12 Best Practices to Launch an In-person Event App Your Attendees Will Actually Use

1

Start with Clear Goals and Stakeholder Alignment

This sounds like a given, but you'd be surprised to know that many event apps fail because planners don't define what success looks like for them.

They jump into planning features and design thinking these components will shape up their event's direction.

This leads to misaligned priorities, wasted resources, and an app that doesn't serve anyone well.

Before you get caught up in features and design, take a step back and get everyone on the same page.



> My advice to all event planners is to talk to all stakeholders and get them to agree on a shared vision. When everyone buys in early, you avoid costly pivots and deliver an app that truly serves your event's goals.
>
> **Muhammad Younas**
> CEO, vFairs

Host a 60-minute virtual stakeholder session where each department shares top three app priorities. You'll quickly see where consensus exists and where compromise is needed. During your session, give them a framework as a starting point and go from there.



Cheat code: Use this prompt to draft a clear agenda
Act as an event strategy consultant. Help me draft an agenda for a 60-minute stakeholder alignment meeting to define top priorities for our event app. The event is a [type], and our main goals are [goal 1, goal 2, goal 3].

Goal-Setting Framework by Event Type

Your goals and KPIs will vary based on the type of event you are hosting. Here are a few examples to illustrate what your event goals can look like:

Event Type	Primary App Goals	Key Success Metrics
B2B Conference	Lead generation, Content delivery	Meeting bookings, Content downloads
Corporate Training	Knowledge transfer, Interaction	Assessment scores, Participation rates
Trade Show	Exhibitor visibility, Networking	Booth scan data, Meeting stats
Consumer Event	Brand engagement, Social sharing	Social mentions, Activity participation



Pro Tip:
Create a checklist and a clear timeline outlining each step in your mobile app set up. A kick-off document helps assure everything is tracked and nothing falls through the cracks.

What success looks like with goal alignment

We've seen how companies like Cadence achieve success at events when they start with clear goals. At their recent event, CadenceLIVE Silicon Valley 2024, they wanted to consolidate their event tech stack and boost event engagement.

These goals directly informed their app strategy.

To avoid switching between multiple tools, they chose vFairs' tech. The all-in-one platform allowed them to manage everything from registration, badge printing, lead capture, to building a custom mobile app for attendees.

The app covered everything from easy check-in options using QR codes, floor maps for simpler navigation, personalized agendas, networking tools, and live surveys for real-time feedback. By adding relevant features, they substantially increased attendee engagement.





2

Prioritize Core Features and User Experience

You know what frustrates attendees more than anything? When they can't find basic information like the session room or who's speaking next.

This happens when you don't prioritize core app features as part of your user experience.

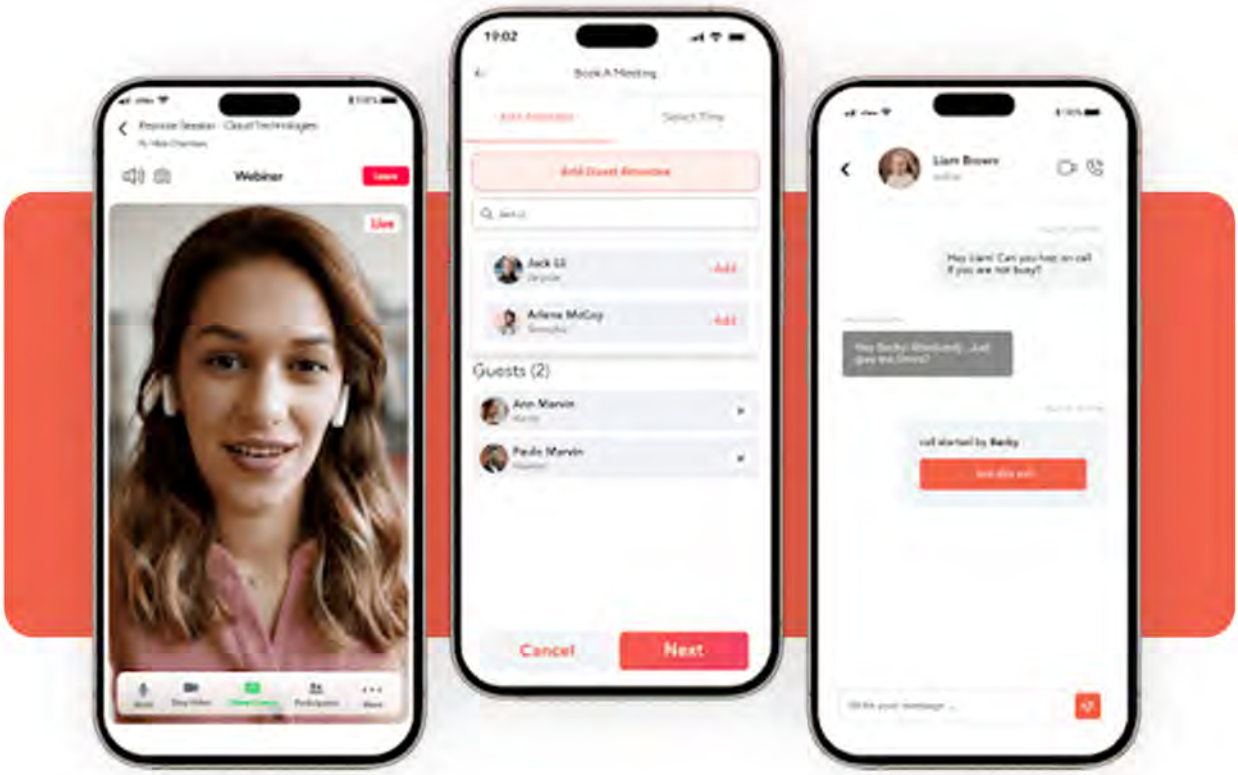


> User experience isn't just what features should we put in the app—it's the invisible architecture that determines whether your app becomes essential or an accessory in your users' daily lives.
>
> **Muhammad Younas**
> CEO, vFairs

Event apps should be designed with a clear structure that attendees can easily understand without confusion. An intuitive design means that users don't have to think twice about where to find key features like schedules, speaker information, or networking opportunities.

Just because your app provider can add 100 different features for you doesn't mean you need to. A sea of features may only overwhelm your attendees, especially if they are not tech-savvy. Some may miss essential features in the midst of all the features.

You need to find out the most essential features your event attendees need and focus on creating your app around those.



Provide these features with enough visibility on the app's home screen. Some of these include:

- Interactive agenda with personalization options
- Comprehensive speaker profiles
- Accurate, searchable floor maps
- Reliable badge/QR scanning capability
- Robust search functionality
- AI chat agents to answer attendee queries

Enter: Feature Priority Matrix - Value vs Need

Create a priority matrix to make the decision easier for you. Here is an example:

User Value

Higher value

Differentiators (High Value, Low Need)

- ✓ AR venue navigation
- ✓ Advanced gamification
- ✓ AI matchmaking
- ✓ Virtual photo booths
- ✓ Integration with wearables

Must-Have (High Value, High Need)

- ✓ Interactive agenda
- ✓ Badge/QR scanning
- ✓ Speaker profiles
- ✓ Floor maps
- ✓ Search functionality
- ✓ AI chat support

Lower value

Low Priority (Lower Value, Lower Need)

- ✓ Virtual business cards
- ✓ Event social feed
- ✓ Advanced analytics

Baseline Features (Lower Value, High Need)

- ✓ 1:1 messaging
- ✓ Social media integration
- ✓ Session feedback forms
- ✓ Content library
- ✓ Push notifications
- ✓ Live polling

Nice - to - have

Must - have

User Need



Cheat Code: Need help creating this matrix? Copy and paste this prompt into your favorite AI tool

Act as a event strategy consultant and help me brainstorm a list of 'Must-Have' features for an event app for a [Type of Event, e.g., B2B Conference, Trade Show] focusing on [Primary Goals, e.g., Lead generation, Networking]. Suggest features considering a [persona eg., tech-savvy audience].

As you finalize your features, keep these technical considerations in mind as well:

- Ensure offline functionality for essential features
- Test performance under high-volume usage
- Verify compatibility across iOS/Android and various screen sizes
- Implement accessibility features (screen reader support, contrast options, text sizing)



Do this:

At vFairs, we've found that comprehensive testing with actual users (not just developers) catches the issues that matter most. Create a "must-work perfectly" list of core features and test them relentlessly with various devices and user types.

3

Design an Intuitive Home Screen

Design the home screen to meet attendee needs.

Think of your app's home screen like the lobby of your venue. It sets the tone and helps people find their way. A well-organized navigation bar, icons, and buttons should guide users naturally to the next step in their event journey.



> Your event app is not a digital brochure. It's how attendees experience your entire event. When they can't figure out the schedule or find the networking lounge, that's not an app problem, that's an event problem.
>
> **Muhammad Younas**
> CEO, vFairs

While having core features is important, users should be able to access them without any friction.

When it comes to user experience, follow these design principles:

- Apply visual hierarchy to emphasize the most important elements
- Limit the number of tiles/buttons (aim for 5-7 primary options)
- Use clear, action-oriented labels
- Incorporate your event branding subtly without overwhelming the interface
- Consider customizable home screens for different attendee types





The key to maximizing engagement at your event is creating an app experience that feels effortless. Attendees can easily navigate, find what they need, and stay connected

Kristian Papadakis
Founder & Product Director



When your design is ready, try this litmus test:
Show your home screen design to someone unfamiliar with your event and ask them where they'd tap to find the agenda. If they hesitate for more than 3 seconds, simplify your design.



Cheat Code: Need ideas? Give this prompt to Lovable get a mockup designed.

Provide layout suggestions for an event app home screen with the following key features: [User lists features]. Prioritize visual hierarchy and suggest action-oriented labels.

4

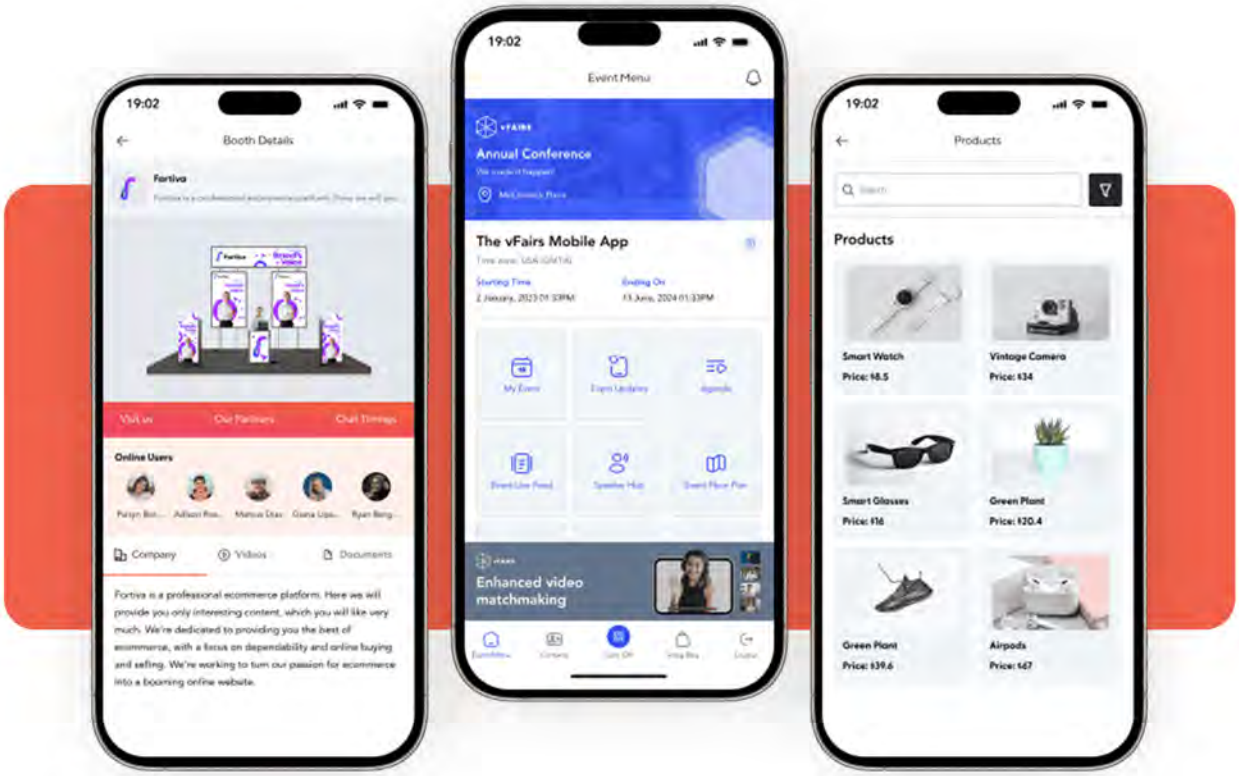
Build Your Event's Go-To Knowledge Centre

Your app should be the go-to source for all event content. Make it easy to find and use with a content hub or resource centre.

These quick tips can help make sure attendees don't have any missed opportunities for engagement and learning.

- Organize digital materials in logical, searchable categories.
- Host on-demand video directly in the app when possible
- Regularly update content before, during, and after the event
- Create content sections specific to your event type:

  For Trade Shows: Product catalogs, exhibitor profiles
  For Conferences: Session materials, presentation downloads
  For Recruiting Events: Job listings with application functionality
  For Training Events: Worksheets, reference materials
  For product launch: Product demos, spec sheets





Try this:

Create content categories that match how your attendees think, not how your organization is structured. Allows attendees to filter materials by topic, format, or relevance to their role. This dramatically improves the user experience for content-heavy events.

A marketing conference should categorize content by topics like marketing automation or email marketing rather than by session type.

Don't forget to:

- Optimize file sizes for mobile download
- Consider bandwidth limitations at your venue
- Provide offline access to essential documents
- Include search and filtering capabilities

5

Create Strategic Engagement Features

Turn passive app users into active participants with thoughtfully designed interactive elements.

'Thoughtful' being the keyword here.

Don't just add games for the sake of having games. The most successful vFairs customers tie their gamification directly to behaviors they want to encourage.

A recent sales summit hosted by a telecom company on vFairs platform is a great example of this tactic. One activity on the leaderboard asked attendees to get their badge scanned by exhibitors. Attendees had an incentive to talk to exhibitors. At the same time, exhibitors got a good flow of traffic at their booths. It was a win-win situation.





> Mobile event apps are not just about enhancing the attendee experience—they're about creating an entirely new level of engagement that keeps people connected, involved, and excited throughout the event.
>
> **Kristian Papadakis**
> Founder & Product Director

You can also get the ball rolling before the event begins. Launch your engagement and gamification features 1-2 weeks before the event date. Incentivize early adopters with rewards for exploring the app, booking meetings with exhibitors or other attendees, and posting about the event on social media.

Use this Checklist to Plan Your App Engagement

- Define 2-3 attendee behaviors you want to encourage (e.g., booth visits, networking, session participation).
- Choose engagement features that directly support these goals (e.g., scavenger hunts, polls, leaderboards).
- Launch at least one interactive feature before the event to build momentum.
- Incentivize participation with meaningful rewards (not just swag).
- Monitor engagement data and adjust on the fly during the event.



Did you know?
With vFairs, you can launch engagement features like gamified leaderboards, instant polls, and networking challenges weeks before your event.

JVS Toronto hosted a hybrid job fair that had over 1,200 attendees participating both in person and virtually. They wanted attendees to connect and network at the event. The mobile app was a great enabler for this purpose. At the end of the job fair, 1,400+ interactions at the onsite booths through QR scanning.



Pro Tip:
Reward early adopters for exploring the app, booking meetings, or sharing event updates on social media. This not only builds buzz but ensures attendees arrive already invested and engaged.

6

Develop a Multi-Channel Promotion Strategy

Even the best app is useless if people don't know about it or understand why they should download it. While early feature launches and incentive programs can help, you also need to promote the app on other channels.

You don't even need to create a ton of assets. Just plan one hero asset and repurpose it for different channels and formats.

Host an information session or training before the event to help attendees get familiar with the app. Encourage them to download the app.

Create a few 15-second videos from the session showing your app's most impressive feature in action. Post it on your social media channels.

Convert the same video into a GIF. Add it to an email blast and give your attendees a quick walkthrough of how to sign up and use the app pre, during and post-event.

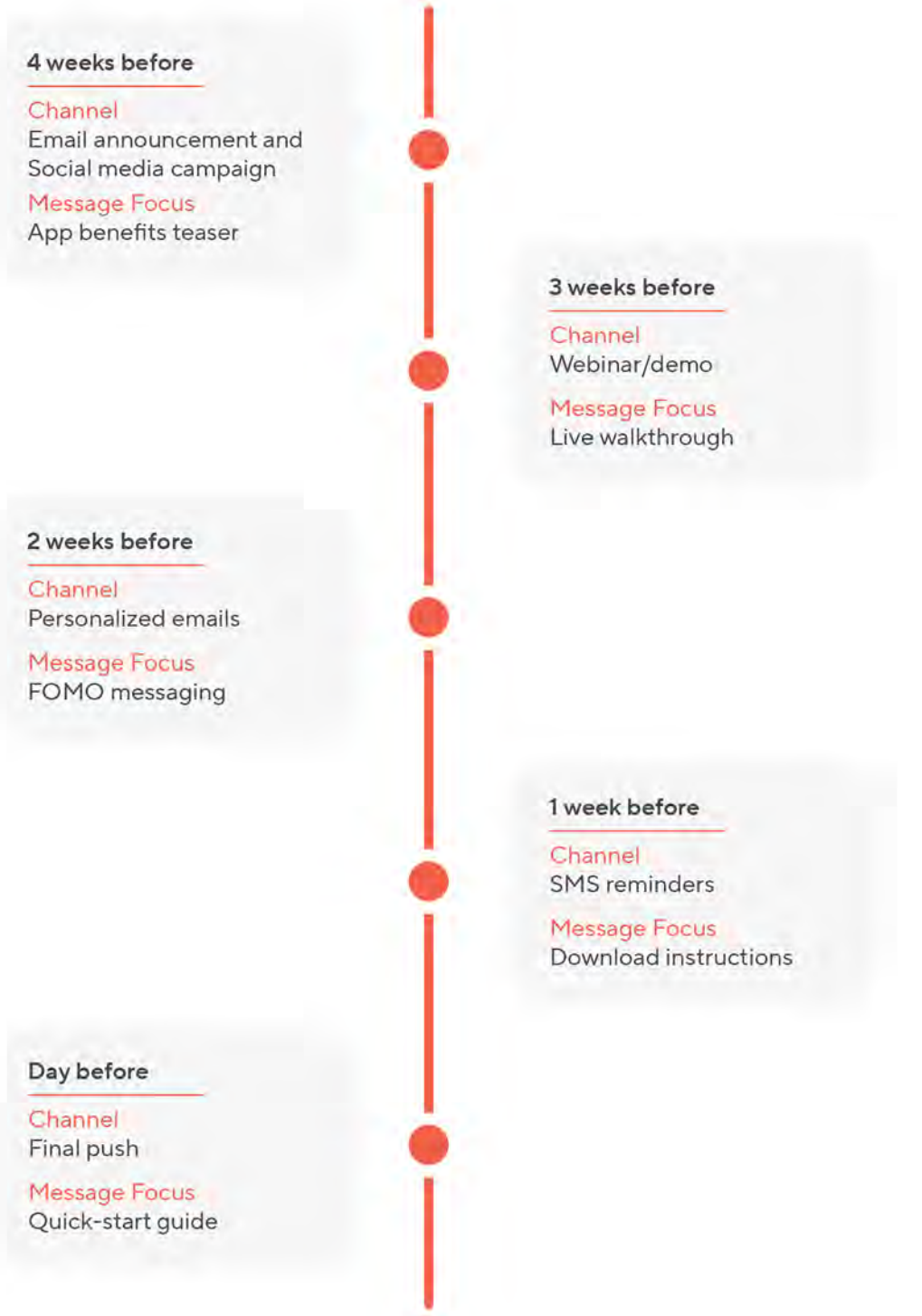
Besides covering all promo channels, you must zero in on segmentation. Your audience will include different types of people. You can't reach them with the same message.

Event Promotion Cheat Sheet to Get You Started

Audience	Primary Channels	Key Messages
C-Suite	Personal emails, LinkedIn	Efficiency benefits, ROI
Millennials	Instagram, TikTok	Social features, gamification
Technical Audience	Twitter, Reddit	Integration capabilities, data access
First-time Attendees	Email, YouTube tutorials	Ease of use, orientation features

Week Promotional Timeline

Start promotions as soon as the app is ready. Ideally, start 4 weeks before your event to get maximum adoption. Here is a promotional plan you can consider for this timeline:





7

Nurture App Users from Download to Maximum Adoption

Many attendees download the app but never explore its features. They either get busy or decide to explore later, but forget about it. Plan automated reminders to stay top of mind and guide attendees through download to active usage.

Here's a sequence you can deploy:

- Day 1: Welcome and profile completion
- Day 3: Feature highlight: Personalized agenda builder
- Day 7: Feature highlight: Networking opportunities
- Day 10: Introduce gamification elements
- 1 week before: Final preparation steps

You need to tweak the content depending on your event goals and user activity. If you want to support exhibitors in getting meetings before the event begins, add a reminder showing attendees how to book meetings.

If you want attendees to register or attend maximum sessions, prioritize personalized agenda reminders over everything else. Here are some ideas:

User Action	Trigger	Message Example
Downloads app but doesn't complete profile	24 hours after download	"Your profile is 80% complete! Add a photo to make networking easier."
Views agenda but books no sessions	48 hours after agenda view	"Sessions are filling up! Add your favorites to your personal schedule."
Books meetings with fewer than 3 exhibitors	3 days before event	"Maximize your ROI by meeting with at least 5 exhibitors."
Hasn't accessed app in 3+ days	After 3 days of inactivity	"New content alert: 3 speaker presentations just added!"



Cheat Code: If you are stuck, try this AI prompt to brainstorm messaging ideas

Based on these user actions [downloads but doesn't complete profile, views agenda but books no sessions - or add your own list of actions], generate message examples for automated app reminders.



Did you know?

With vFairs, you can easily set up automated email workflows for registrants within the backend. You don't need a separate email automation tool for it.

Dont forget to:

Test different message formats to see what drives the highest engagement:

- Question vs. statement format
- Emoji vs. no emoji
- Morning vs. evening delivery
- Value-oriented vs. FOMO messaging

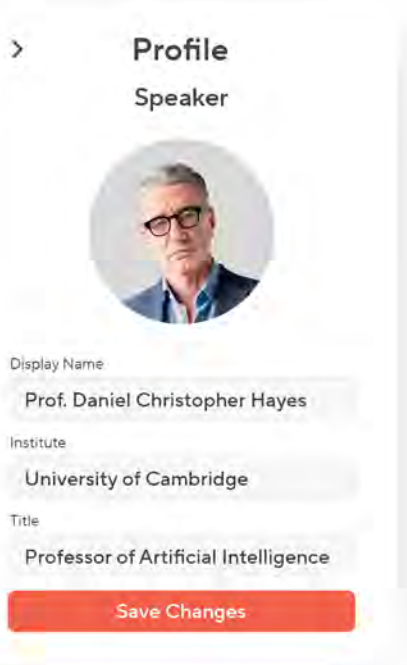
8

Prepare Your Speakers and Exhibitors to be App Champions

Your app isn't only for your attendees' benefit. Don't forget your sponsors, exhibitors and speakers.

Your speakers and exhibitors can be your greatest app ambassadors.

Set up their speaker profile in advance. Encourage them to post about their session or attendance. Do a LinkedIn live pre-event with the speaker to give your audience a little taste of what these speakers will discuss. Encourage an AMA on platforms like Reddit, X or even LinkedIn, warm up the crowd and collect questions.



Open up the exhibitor and sponsor portal a week before the event so that they can book meetings. Participating companies can share that they are attending on their social media, encourage attendees to download the event app and book the meeting slots.



Try this:
Create a "speakers/exhibitors cheat sheet" with the top 5 ways they can use the app to enhance their presence. Distribute it to them a week before the event. Don't take this step lightly.

Plan this properly and you will see your app adoption rates go up. Your exhibitor/speaker/sponsor happiness level will skyrocket.





DURING THE EVENT PHASE

DRIVE ACTIVE USAGE

12 Best Practices to Launch an In-person Event App Your Attendees Will Actually Use



9

Reinforce App Usage On-Site

Just because people have made it to your events doesn't mean you need to stop prompting the app. Now is the best time to help attendees realize the real value of the event app.

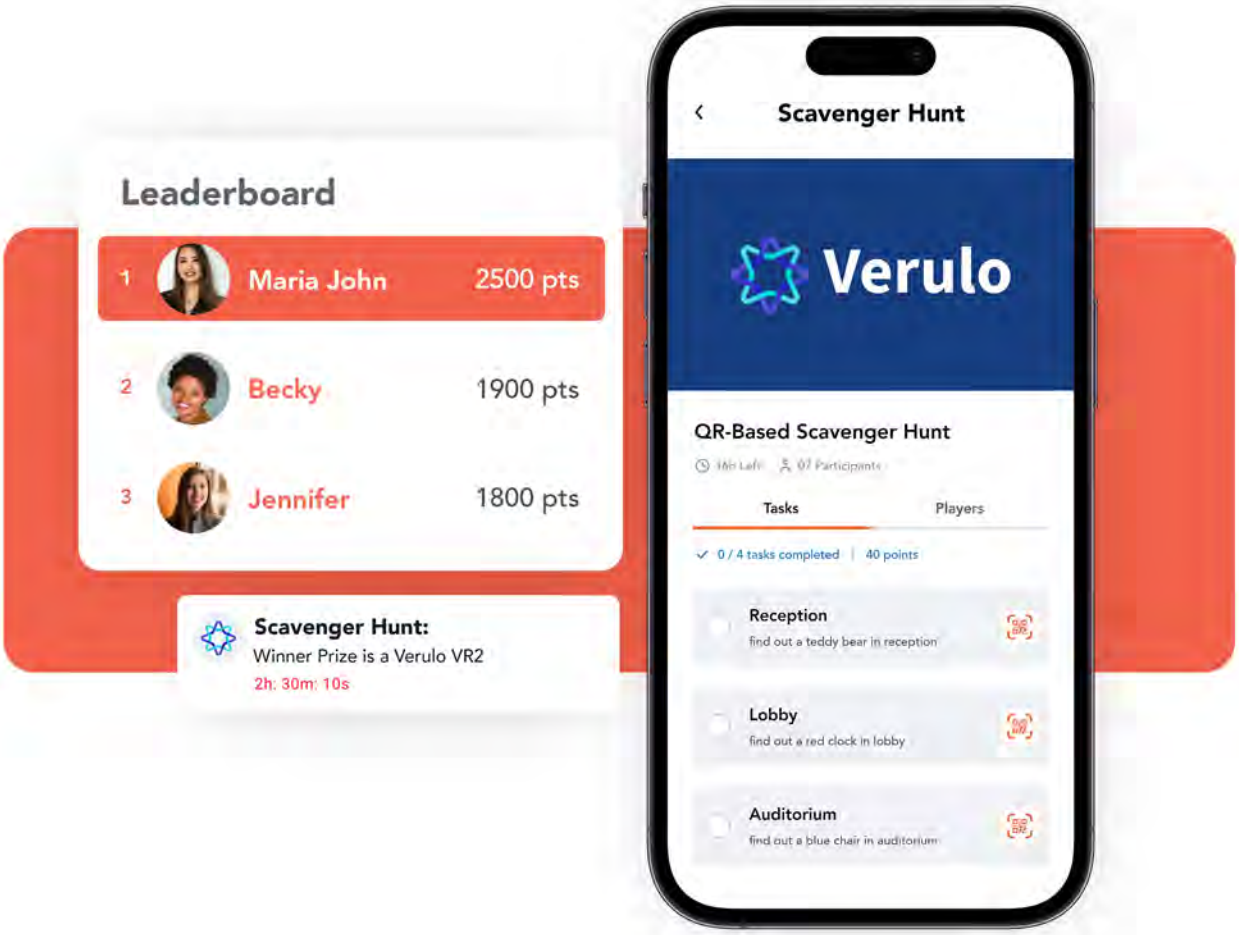
As attendees enter the venue, train your staff at the reception to check with attendees and confirm if they've downloaded the app. If not, request them to do so. Paste a QR code at the reception desk for easy access. Display the QR across TV screens and encourage people to download the app.

Set up a troubleshooting station and appoint trained staff to provide instant tech help.

- Help with downloads and login issues
- Demonstrate key features
- Solve common technical problems
- Gather feedback on app usability

Add soft reminders before or after key sessions.

Besides adoption, you also want to make sure those who have the app use it. For this, you can send email reminders or schedule push notifications around activities. Plan games and networking sessions that would require the use of the app.



A leading telecom company wanted to encourage conversation between various business units at the latest event. They launched a scavenger hunt with clues that compelled attendees to chat with other attendees. It got people up, around, and talking. It was valuable for the business, 70+ participating sponsors and 2000+ attendees alike.

10

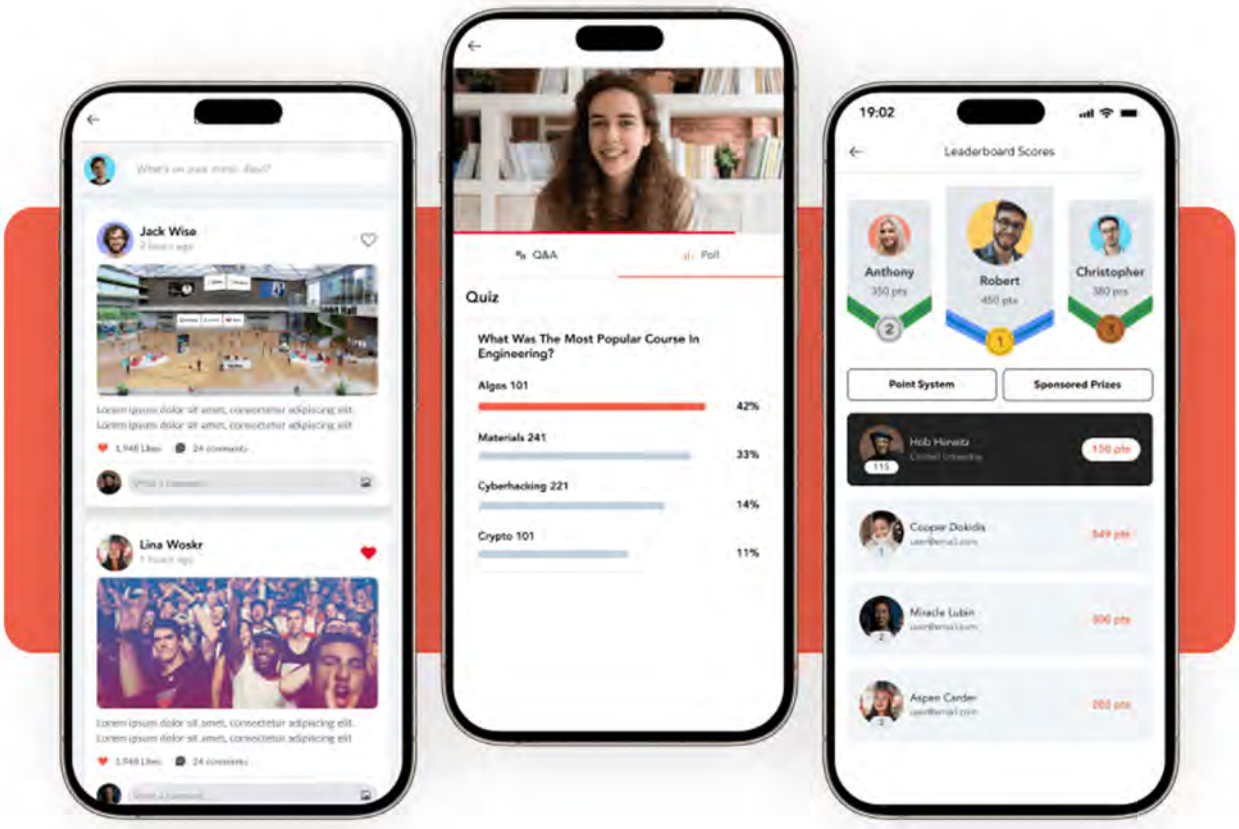
Monitor Live Engagement

Keep an eye on how people are using your app in real-time so you can make smart adjustments. Real-time feedback is one of the best ways to improve an event as it's happening. Use live polling or instant surveys to get feedback and make changes on the fly.



Pro Tip:

Assign someone to be your "app engagement monitor" during the event. Train them to interpret data patterns. Give them authority to send push notifications or make quick adjustments based on what they're seeing on the analytics dashboard.



To implement this effectively, start by identifying which metrics matter to you the most. A few things to consider:

- Session attendance vs. registration (identify no-shows early)
- Dwell time in specific areas (virtual or physical)
- Peak engagement periods and content types
- Question volumes in Q&A features
- Networking activity patterns
- Search query trends

Tactics you can implement quickly to increase engagement:

- Send targeted push notifications for underattended sessions or exhibits
- Highlight trending topics or popular speakers through app banners
- Deploy "flash" engagement activities in areas with lower traffic. For example, announce a spin the wheel competition for session with a low number of attendees and award prizes



Cheat Code:
When you are onsite, you're tackling so much. A little help from AI can save you time and effort. Use this prompt to brainstorm quick engagement ideas.

Act as an event engagement expert. Suggest 3 last-minute, easy-to-implement tactics to boost attendee engagement using our event app. The event is currently underway and we have access to real-time app usage data. Our goal is to increase [mention specific engagement metric, e.g., session attendance, networking interactions, participation in polls]. Provide actionable ideas with specific examples of in-app messaging or features we could send.



POST - EVENT PHASE

KEEP ENGAGEMENT GOING

12 Best Practices to Launch an In-person Event App Your Attendees Will Actually Use



11

Track Performance and Record Takeaways

Teams often move on after the event without tracking its performance. Younas recommends using data to understand audience behavior. The insights from your app usage can transform your next event if you know what to look for.

- Look at session preferences, survey responses, and booth traffic to gauge what caught their attention.
- Track content downloads, engagement rates and chat logs to assess the level of interactivity with the event.
- Check survey and poll responses to solicit feedback.



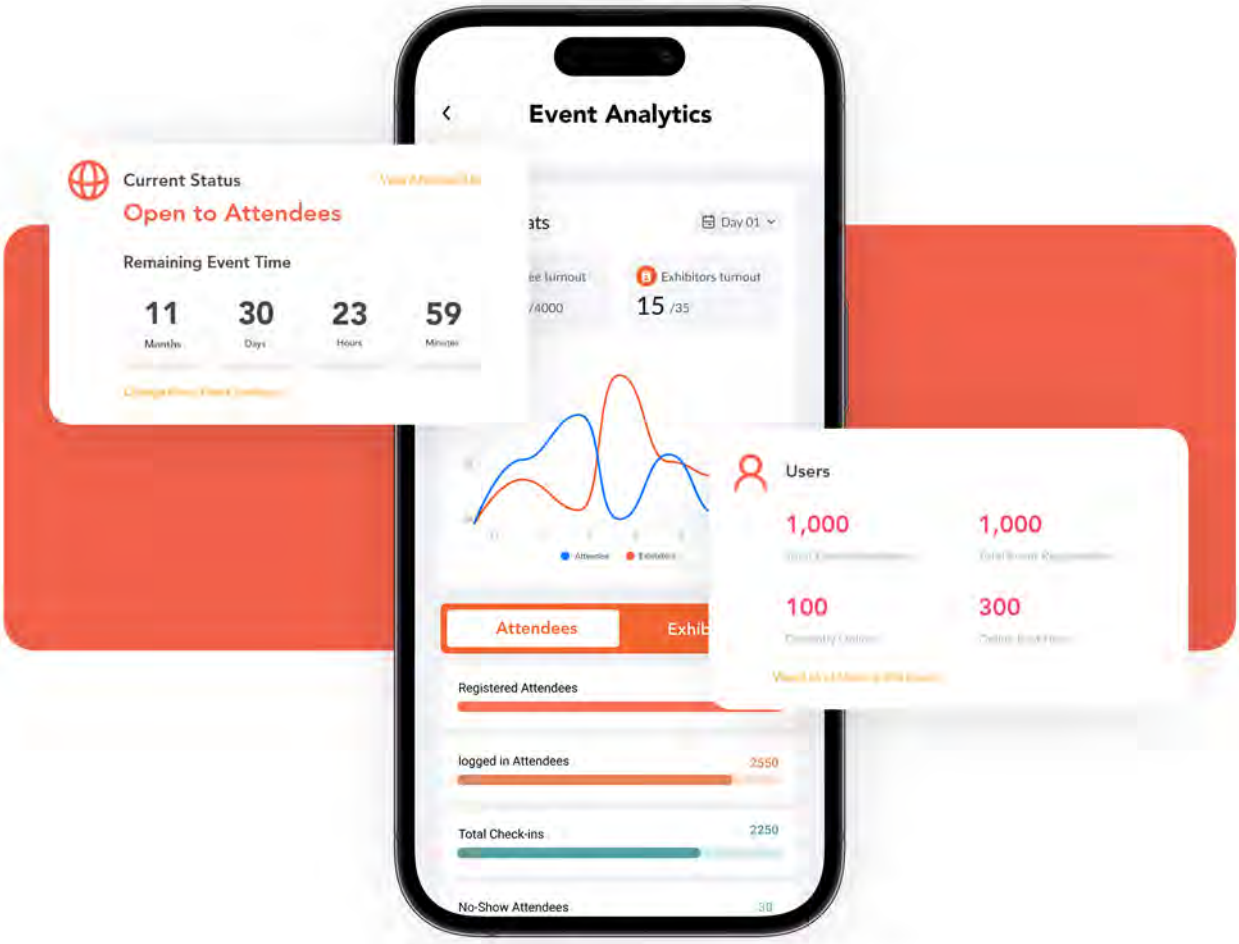
> Data tells you the real story of your event. It's not just about how many people showed up, it's about understanding what made attendees stick around, what sessions they loved, and how to make them want to come back next year.
>
> **Muhammad Younas**
> CEO, vFairs

Don't limit your analysis to a single event. Consolidate data from all your events and do a longitudinal analysis.

- Track attendee behavior across multiple events
- Identify trends and changing preferences over time
- Create attendee profiles based on consistent behavior patterns
- Track how app interactions influence customer journeys
- Measure the impact of event participation on customer lifetime value



Pro Tip:
Establish a systematic process for collecting, analyzing, and implementing insights. This way, your data analysis step will not be an afterthought. It'll become a part of your event debrief. Replay these findings to influence any necessary app changes for future events.



12

Extend the App's Lifecycle

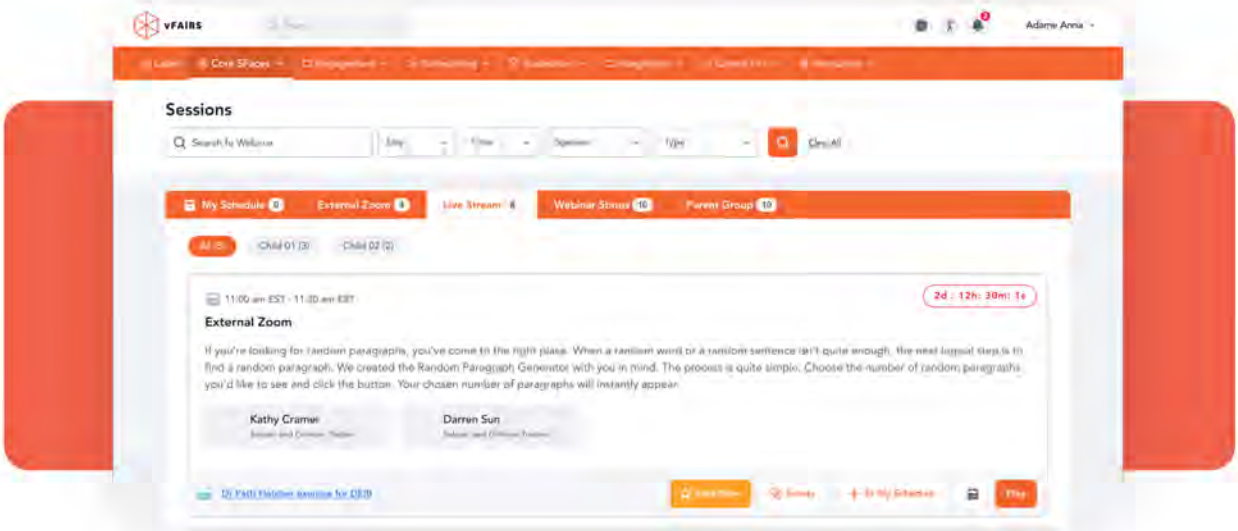
Your event may end, but your app doesn't have to disappear. There are so many ways you can still engage your attendees. Deploy feedback surveys within the app to increase the response rate. Keep the chatbot active to help guide users through any post-event queries.

Plan your post-event content strategy before your event even happens. Once the event ends, upload sessions on demand. You can also schedule new content drops every few weeks to keep users coming back.

Email your attendees, informing them and share a clear timeline until when they can access that content. Give recommendations about what sessions to watch on demand or brochures ot download based on their interest.

You can also encourage attendees to keep networking with peers they have met onsite. Use the app to create a lasting community that continues to engage long after the event is over.

LASHCON, a conference for lash artists, did this very well. After the event concluded, attendees had access to 40 recorded educational sessions through the app. The organizers provided ongoing value to their community of lash artists who typically work in isolation and extended the life of the app as well. This approach contributed to an impressive NPS score of 70+.



Take Your Event App from MEH to an Audience Favorite

Attendees expect experiences that feel tailor-made to their interests and needs. Event apps are a great way to do just that if you don't treat them as a fancy add-on. Event apps should be your attendees' companion for navigating and engaging with your event whenever they need.

Align your app features, design, and experience with your event goals and audience needs.

We'll leave you with a quick TL;DR:

- Start with clear goals aligned to your event objectives
- Focus on essential features that enhance the attendee journey
- Design for intuitive navigation and ease of use
- Promote early and often across multiple channels
- Enable speakers and exhibitors as app champions
- Monitor, measure, and adjust based on real-time data
- Extend value beyond the event dates

The outcome? You hand attendees your event inside the app and help them make the most of it.

PS. Scroll down for an implementation checklist for these best practices.

PPS. Liked the AI prompts shared in this e-book?
Access our complete AI prompt library FREE.

Ready to build an event app your attendees will love?

Book a Demo with vFairs

Appendix

Quick Implementation Checklist

8 Weeks Before:

- ✓ Set goals and align stakeholders
- ✓ Select app platform
- ✓ Define core features

6 Weeks Before:

- ✓ Design home screen and user experience
- ✓ Begin content creation
- ✓ Plan engagement features

4 Weeks Before:

- ✓ Launch app for early adopters
- ✓ Start promotional campaign
- ✓ Onboard speakers and exhibitors

2 Weeks Before:

- ✓ Implement automated user journeys
- ✓ Conduct final testing
- ✓ Prepare on-site activation plan

During Event:

- ✓ Monitor real-time analytics
- ✓ Activate on-site promotion
- ✓ Address issues promptly

Post Event:

- ✓ Analyze performance data
- ✓ Launch post-event content
- ✓ Plan long-term engagement

AI Prompts to Make Event App Planning Easier

Create an agenda for stakeholder alignment session

Act as an event strategy consultant. Help me draft an agenda for a 60-minute stakeholder alignment meeting to define top priorities for our event app. The event is a [type], and our main goals are [goal 1, goal 2, goal 3].

Create a feature priority matrix

Act as an event strategy consultant and help me brainstorm a list of 'must-have' features for an event app. The [event type e.g., B2B Conference, Trade Show] focuses on [primary goal, e.g., lead generation, networking]. Suggest features considering [persona eg., tech-savvy audience].

Need your app design to be intuitive. Give this prompt to Lovable and get a mockup designed. You can also launch the app later if you like.

Provide layout suggestions for an event app home screen with the following key features: [User lists features]. Prioritize visual hierarchy and suggest action-oriented labels.

Brainstorm messaging ideas to nurture users from downloads to active usage.

Based on these user actions [downloads but doesn't complete profile, views agenda but books no sessions, or add your own list of actions], generate message examples for automated app reminders.

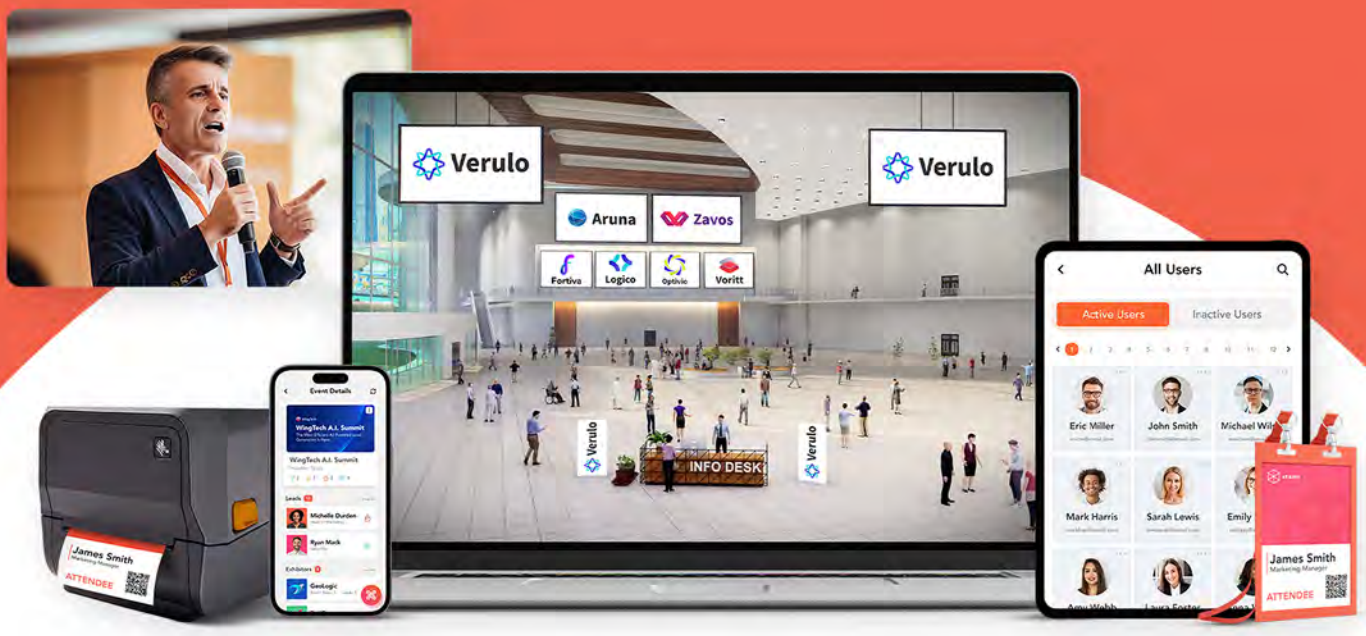
Use this prompt to brainstorm quick engagement ideas onsite to boost engagement

Act as an event engagement expert. Suggest 3 last-minute, easy-to-implement tactics to boost attendee engagement using our event app. The event is currently underway and we have access to real-time app usage data. Our goal is to increase [mention specific engagement metric, e.g., session attendance, networking interactions, participation in polls]. Provide actionable ideas with specific examples of in-app messaging or features we could send.

vFairs is the all-in-one event management solution for virtual, hybrid, and in-person events.

vFairs provides user-friendly, integrated technology that maximizes engagement and interaction for events of all sizes. We help organizations plan and execute events with ease, deliver engaging experiences, and capture actionable insights.

To learn more or book a demo, visit vfairs.com or contact us at sales@vfairs.com.



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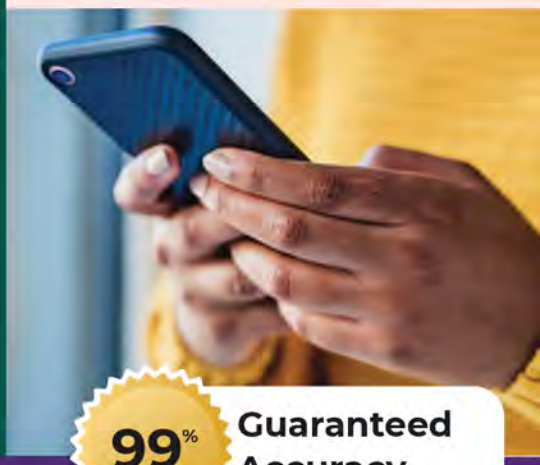

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PRE EVENT

- Build shot by shot run of show in Greenroom - our proprietary production tool
- Add elevated graphics, engaging overlays, and audio tracks all with Stylepacks
- Pre-record and edit key content all in Greenroom
- Build custom whitelabeled landing pages and attendee assets aligned to your brand

DURING EVENT (AUDIENCE SIDE)

- Registration restrictions to keep your content for your audiences eye's only
- Engaging page builders rich with content modules for any event type
- Break out of the boxes with a streamline video forward player
- Maintain engagement with chat, reactions, gifs, quizzes, polls, and so much more

DURING EVENT (PRODUCTION SIDE)

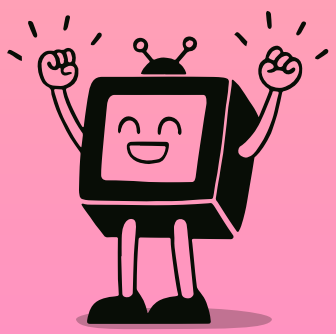
- Manage multiple live feed destinations
- Backstage communication tools
- Voice guided teleprompter
- Easily control, adjust, replace, and advance slides and other media
- SIP conferencing connections and built in meet Google Meet integration

POST EVENT

- On-demand content instantly accessible after your event
- Crop, splice, and edit content on-demand for social and more
- Integrated analytics that align perfectly into your existing tech stack
- Reach asynchronous audiences with on-demand content they can watch on their schedule

BRANDLIVE STUDIOS

- Creative designers on hand to craft compelling event assets
- Onsite and remote producers to build and execute your event
- Lighting, audio, and broadcast experts and equipment to ensure you sound and look your best every time



USE CASES

Marquee Virtual Events
- Annual Summits
- Product Launches
- Conferences
- Industry Panels

Webinars
- Lead Gen
- Content Series
- Enablement/Training
- Thought Leadership

Townhalls
- All Hands
- AMAs
- Firesides
- Sales Kick Offs

EXTRAS

eCDN	✓
Closed captioning	✓
Integrations	✓
Advanced registration restrictions	✓
Secure content protections	✓
Translations	✓
Custom Branding	✓
Firesides/ breakout sessions	✓
Virtual backgrounds	✓
Video recording & editing	✓
Multi-streaming	✓
Schedule streaming	✓
Themes/ templates	✓

BY THE NUMBERS

Attendees	Unlimited
Speakers	Unlimited
Projects	Unlimited
Emails	Unlimited
Duration	Unlimited
Resolution	1080p
Security	AICPA SOC 2 Type 2

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EXCLUSIVES DON'T HAVE TO BE

A Quick Start Guide To Effective AV Negotiations

SMARTSOURCE



One of the last things an event professional, meeting planner, or trade show organizer wants to hear from a venue or hotel is, “We have an exclusive in-house audio visual supplier.” Usually, these providers are presented as a *fait accompli*, non-negotiable part of the contract, but it doesn’t have to be that way.

This quick guide provides concrete tips that meeting and event planners and expo organizers can use to circumvent the dreaded E-word and successfully negotiate it away.

“The most important thing to know is that ALL points in contracts are negotiable. Do the work ahead of signing the contract. Ask the questions. Get answers in writing,” advises Chad Frank, VP of Sales, Event Solutions, SmartSource. If you are using a third-party negotiator, make sure they alert you, the client, about all exclusives in the building – ahead of signing the contract.

The Terms: Knowing the terminology can save your budget hundreds or even thousands of dollars. There are three common types of AV supplier agreements:

1. **Preferred - External.** Outside companies are ‘recommended’ by hotels and venues. These providers may or may not pay a commission on services provided in the venue in exchange for referrals.
2. **Preferred - In House.** Venues and hotels may strongly recommend using outside companies who have offices on their premises. These companies pay a commission on sales and/or a fee to the hotels or venues for having an on-site location, passing the cost of the commission along to clients.

3. **Exclusive.** Thankfully, there are only a handful of these types of properties (exclusives) in the United States.
    a. These properties force clients into using the audio visual provider of their choice. In turn, the AV company pays a set commission from client sales to the venue or hotel, creating increased costs for the event organizer.
    b. If the property 'allows' the planner or organizer to use an outside provider, then they narrowly define the type of session your audio visual provider may set up. Typically, these are kept to keynote/general sessions, which are considered creative, but not breakouts, which are considered "cookie cutter." For using an outside vendor, prices for in-house sets are raised accordingly.
    c. If the exclusive provider "permits" the planner or organizer to bring in their own AV company, costs for rigging, labor, and electrical services within the hotel/venue increase substantially. Ken Edwards, Senior Solution Sales Executive, SmartSource says, "They may call it 'bundled services' or some other name without detailing what those charges or fees are. Most times, they may be negotiated away. Make sure you ask for those rates to be detailed in writing during the process."

BENEFITS OF AN INDEPENDENT AV SUPPLIER

There are many benefits to using an outside, non-preferred or non-exclusive audio visual provider including better service, lower prices, and an assigned team who works with your organization from design through implementation on-site. Companies such as SmartSource are keen to develop long-term, successful working relationships with clients. They are in it for the long haul.

> *"When talking with new clients, we share our focus on the benefits of a long-term relationship," says Trisha Siegelstein, SmartSource Solution Sales Executive. "One of the biggest benefits, besides a lower cost, is having the same team dedicated to every event, year after year. We are able to provide a better comfort and service level than exclusive, venue-bound providers."*



Some preferred and exclusive providers have a *"burn and churn"* mentality. It might be the case of getting clients in and out of the building as quickly—and for as much profit—as possible. Siegelstein continued, "If something goes wrong, they've already moved on to the next event and client, without any ramifications for bad service or faulty equipment at your event or expo."

SAVE COSTS

Meg Tousey, Business Development Executive, SmartSource, suggests planners and organizers ask in-house exclusive providers for their **Best and Final Offer (BAFO)**. She explains, “Many times, exclusive providers will charge outrageous fees for even basic AV. If you tell them you’re getting bids from other suppliers, they will ask to see the other bids and then try to undercut them. *Always ask for the best and final price FIRST.”*

Frank said, “Don’t waste your time going back and forth. Make them be serious or respectful of YOU and your time from the start.”

He added, “Additionally, during your negotiations, find out what the ‘convenience’, ‘accommodation’, or ‘service’ fees are for using your own AV company. Depending on those charges, it may still be more economical to bring in your own provider rather than pay the exclusive’s going rate.” He also suggests finding out what the venue’s guaranteed minimum spend is and factor that into your final decision.

Speak candidly with your venue Customer Service Rep or Account Manager. Ask them, “Are you saying that no customer of the hotel has been able to bring in their desired partner versus the house provider without penalty/up charging of electrical, Wi-Fi, etc.?”

“We analyze the quote including looking at the event’s history and locations to help our clients save money. When you can help save $20,000 or $30,000 in basic audio visual needs, it helps clients afford more bells and whistles, maximizing impact,” added Edwards.

Tousey continued, “In-house providers often bundle services into





packages, some of which you may not need or use. Always request an itemized quote—including fees—so you can see what you're being charged for." And sometimes venues will allow customers to bring in their own audio visual if they are hitting the minimum spend elsewhere on catering, etc.

Another pro tip? Ask for customized AV for your event. While "packages" are nice, most are designed to be easier for the in-house supplier to deliver, not for the client experience. If you're not sure what you will need, ask. Again, get everything in writing when it comes to quotes, etc.

If your meeting, conference, or expo is held in a second- or third-tier city, sometimes it may be more cost effective to go with the in-house provider. Be sure to include the cost of transporting materials and labor to your event when considering costs.

REFERENCES ARE KEY TO THE DECISION-MAKING PROCESS

- Ask for references from other clients who have managed similar events and have used the in-house, exclusive provider.
- Ask for a reference from an event planner who brought in an outside AV vendor.

Depending on the relationship you have with the venue, ask for a reference from an event planner who wasn't happy with the exclusive audio visual provider. Find out what happened and how it was resolved. Did they receive a credit on services? A promise for a discount on a future event? If the venue doesn't have their exclusive's back, it's a red flag.

WHAT IF THE CONTRACT HAS ALREADY BEEN SIGNED?

Dave Weiner, Account Manager, Event Solutions, SmartSource suggests reviewing your cancellation policy, especially the terms and conditions (T&Cs). “If there’s no penalty, then think about backing out of the contract and renegotiating it.”



TIPS

- ☐ Always negotiate ahead of signing the contract. **Everything is negotiable.**
- ☐ Mutually define the terminology and definitions when you begin negotiations. You want to compare apples to apples!
- ☐ Ask for the venue/hotel price lists for electricity, labor, rigging, service fees, and other venue (hidden) costs. There may be two separate prices for these–one if you use the exclusive provider, the other if you bring in your own audio visual provider. Get both in writing.
- ☐ Ask for references for similar types of events held in the building.
- ☐ Ask what other events the audio visual provider is working with in the building at the same time as yours. This is important because you need to know if most of their resources may be going to another client and not to your event.
- ☐ Call SmartSource®. As your trusted AV partner, we’ll be with you from start to finish—no matter where your events take you.

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Event sustainability is becoming one of the fastest-growing trends in the meetings industry and for good reason. Today's event professionals are more climate-conscious than ever before, and they're already doing their part to save the planet. While the events industry offers awesome contributions of learning, entertainment and networking for attendees, **its waste and carbon footprint are undeniable.**



A recent sustainability study by pc/nametag found that 91% of event planners agree that the **amount of waste generated by today's events** needs to be improved.[1]

As a planner, you play a key role in **addressing some of the sustainability challenges** we face in the events industry, but it can be difficult to know where to start. The good news is that putting on an eco-conscious event is easier than you may think. With the right tools and knowledge, you'll be better prepared to reduce negative impacts on the environment while still giving attendees the same exciting event they've come to love.

What You'll Learn in This Toolkit

Aiming for full sustainability will come with time, but let's start by working to reduce your impact step-by-step, starting today. This guide will show you the key to reduced usage, fewer unnecessary purchases, and less waste (which is great for your budget)! You'll also learn industry standards to follow, as well as useful strategies to help you plan and get ahead in this extraordinary industry.

1 | SUSTAINABLE EVENTS AND WHY THEY MATTER



Sustainability is an expansive concept and often difficult to define. According to the Environmental Protection Agency, everything that we need for our survival and well-being depends, either directly or indirectly, on our natural environment. They say:

"To pursue sustainability is to create and maintain the conditions under which humans and nature can exist in productive harmony to support present and future generations."[2]

So, of all the environmentally conscious terms out there, like "green," "eco-friendly," and "ethical," **sustainability sets the focus on the future.** It means the item or action (in this case, an event) is generating environmental, social, and economic benefits, while not using too many natural resources or causing pollution.

For years, a common myth among planners is that an event can't possibly be cost-effective, sustainable, and still enjoyable all at the same time. **Hosting a sustainable event seemed like a feat too difficult to attempt.**

In this guide, we'll challenge this mentality and help you put processes in place to help you reduce your impact on the environment and gain highly rewarding benefits you may have never thought possible.

2 | TWO TYPES OF SUSTAINABLE EVENT MANAGEMENT PRACTICES



Now that we've explored the importance of sustainable events, let's dive into two examples of sustainable event management practices to give you a better idea of what an eco-conscious event can look like. Here's the difference between a **"Zero Waste"** event and a **"Leave No Trace"** event.

Type 1: "Zero Waste" Sustainable Events

A zero waste event, or "zeewee" as it's nicknamed, can be any size, from a large sporting event to a community fundraiser. **The ideal zero waste event is one in which the organizer has an extensive plan to reduce solid waste from the event.** This can be done by reusing various items such as signage and setting up zero waste stations for composting and recycling food, paper products, and plastics.

Some event organizers have the capacity and resources to plan such a sustainable event, particularly if it's a large one. They develop an extensive sustainability policy, include suppliers who align with their policy, train staff, educate attendees, construct bins for recycling, compost and other materials, and develop other creative initiatives that involve the three R's of waste hierarchy: *Reduce, Reuse, Recycle*.

Zero Waste Event Feature

A great example of a zero waste event is the annual **Waste Management Phoenix Open** held in early February. Taking sustainability to a new level, this event implemented a comprehensive sustainability program to manage and reduce impacts on the environment from materials, water, energy usage, and greenhouse gas emissions. Thanks to these initiatives, the Waste Management Phoenix Open is **one of the largest zero waste events in the world with 500,000 to 700,000+ people attending annually.**



Type 2: "Leave No Trace" Sustainable Events

In the mid-20th century, U.S. government agencies came up with "Leave No Trace Land Ethics," a set of outdoor ethics promoting conservation in the outdoors.[3] Here are the seven principles it contains:

1. Plan ahead and prepare.
2. Travel and camp on durable surfaces.
3. Dispose of waste properly.
4. Leave what you find.
5. Minimize campfire impacts.
6. Respect wildlife.
7. Be considerate of other visitors.

These principles have been adapted to different activities, ecosystems, and environments. The goal of the initiative is to build awareness, appreciation and respect for our environment through the choices we make. These ideals can easily be adjusted and applied to the events industry. Let's take a look at an example.

"Leave No Trace" Event Feature

An event that practices the "Leave What You Find" mentality is **Burning Man**, one of the largest no-trace events in the world. This event is held annually in a temporary city called Black Rock City, located in the Black Rock Desert of northwest Nevada. Burning Man attracts 80,000 global participants to the desert for nine days to experience artistic self-expression through experimental and interactive sculptures, buildings, artistically designed cars, and other media.



Attendees practice recycling, composting and renewable energy at the event and reduce their traffic footprint by using buses and carpools. They also manage their own trash. The Burning Man Project, a non-profit organization, continues to go to great lengths to minimize its impact on the environment.

3 | COMMON MISCONCEPTIONS ABOUT SUSTAINABLE EVENTS



Unlike the myth that still pervades planners about the higher cost of going green, **a sustainable event can save money for your business and bottom line, even by making small changes.** Eco-efficient practices like avoiding products you don't need, reusing those you have, incorporating vegan and vegetarian menus, and replacing bottled beverages with water stations can all be cost-saving opportunities.

To understand your event's environmental impact and what you can do to improve it, first know where you're starting from. Analyze things like travel (i.e., for your staff, sponsors, speakers, vendors, and attendees), waste, food and beverage, energy, printed materials, and venue. Out of these areas, what is the largest drain? **To make the biggest difference, it's often best to start with the biggest area of concern.**

Reducing your event's impact on the environment will improve the sustainability of your business, too. When you're less dependent on natural resources and can deal with rising costs due to climate change, your business has a greater chance of long-term success and profitability.

Here are a few easy green meeting ideas we recommend:

- Reduce the usage of single-use plastics and paper products
- Only provide sustainable giveaways
- Arrange to have your booth built of sustainable, recyclable, and reusable materials
- Use only public transportation, rideshare, or walking to and from the event

4 | EXPLORING THE "STANDARD" FOR A SUSTAINABLE MEETING



While the internet and social media create tremendous possibilities for global connections, events provide the efficiency, nuance and sheer pleasure of face-to-face contact. Unfortunately, the downside to events is what they leave behind. As people in large numbers get together, they create significant amounts of waste, strain local resources like water and energy, and may even cause tensions due to the proximity to nearby communities.

The **International Organization for Standardization**, or ISO, is an independent, non-governmental global organization bringing members with expertise together to develop standards that provide solutions to worldwide challenges. The organization has a membership of 164 national standards bodies or one member from each country.

The international standard for event sustainability management systems, known as "**ISO 20121**," is a practical tool for managing events that employs the three parts of sustainability – economic, environmental and social.[4]

ISO 20121 is important because it provides a foundation for events and state-of-the-art-solutions for the worldwide event industry, because it was developed by representatives of this sector on an international scale. The standard takes on the event industry's challenges in all three levels of sustainability – economic, environmental, and social – and at every stage of the supply chain.



Who Benefits from ISO 20121?

The standard benefits all players in event management, which include:

- Event organizers
- Event owners
- Workforce
- Supply chain (catering, construction, transportation)
- Participants
- Attendees
- Regulatory bodies
- Communities

ISO 20121 represents best practices for event planners by providing an organized, process-based approach to managing events. Utilizing this globally accepted framework, planners can demonstrate their sustainable initiatives in a credible and transparent way.



Why ISO 20121 is the Ideal Framework for Events

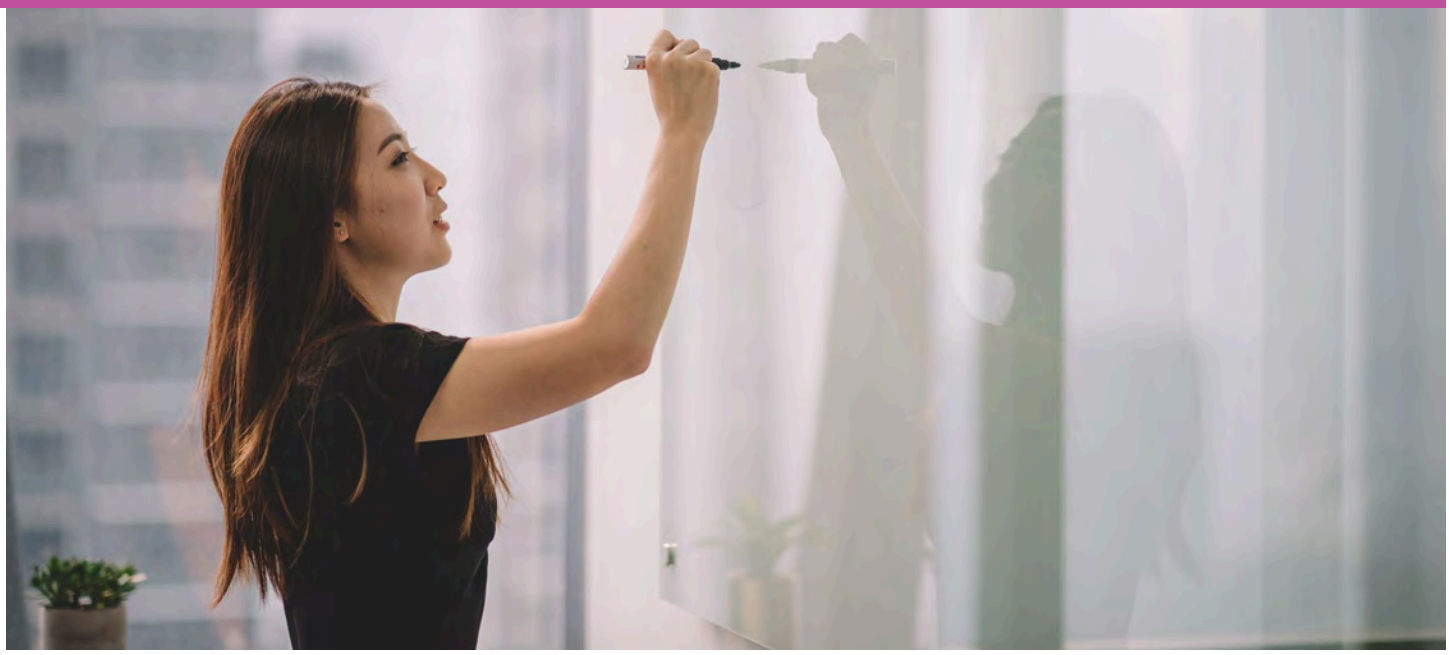
This standard applies to any organization or individual and all types of events, whether the event is a conference, exhibition, sporting competition or music festival. No matter the size of your event, ISO 20121 is as relevant for small company meetings as it is for large conferences. It requires monitoring and measuring, so it can reduce resources and cut costs.

ISO demonstrates sustainability in a globally recognized manner, so events in different geographical locations with different sustainability issues, still implement the framework. Additionally, **it offers a common international language for events management** with a plan for global tendering and comparison of offers, encouraging international trade.

This standard can also be of great benefit to your company's processes as well as your customers and stakeholders, such as regulators who have health, safety, and environmental responsibilities related to events. When local communities and non-governmental organizations have concerns about an event, they too can use the standard as a foundation for their dialogue.

With global discussions shifting from climate change to climate crisis, more **industry leaders are using ISO 20121 to guide their venue and event best practices**.

5 | THE DO'S AND DON'TS OF SUSTAINABLE EVENT MANAGEMENT POLICY



As you begin your event planning, we recommend you **create a sustainable event management policy**. This policy requires you to consider all your environmental touch points and factor them into the entire planning process, minimizing your event's waste and carbon footprint.

To help you get started with your Sustainable Event Management Policy, we have a curated list of dos and don'ts to get you through your policy creation process.

- **Do:** Itemize priorities so goals are achieved.
- **Don't:** Wait until the last minute to add green practices.

  Typically, last-minute green practices are cobbled together using existing best practices with new ideas thrown in and can appear as a mish-mash of random acts that lack clear objectives. You wouldn't plan your event without specific financial objectives, so why should your sustainable goals be any different?

- **Do:** Train staff and vendors in how to spend time and resources.
- **Don't:** Assume everyone knows what to do or take everything on yourself.

  While finding the time during your busy day to discuss the program with stakeholders, it's important that a sustainability policy formalizes expectations and gives clear priorities from the start.



- **Do:** Reduce risk to your company image.
- **Don't:** Neglect your company's rights or reputation.

Events are the public face of organizations' and sponsors' reputations. A sustainable event policy can be the vehicle to protect against ethical issues, irresponsible sourcing decisions, corrupt bidding processes, labor disputes, or any other social or environmental issues that can cause negative public relations.

Create Your Own Sustainable Event Management Policy

A Sustainability Event Management Policy may sound like a mouthful but it's actually a great way to organize your thoughts before you dive into the event planning process. Use this list of pointers to get started:

1. Clarify scope. In the beginning, decide what the policy will apply to. Will it cover one event or multiple events? One department or an entire organization? Will the policy control or merely influence the event? Will the entire event or just a part of it be affected by the policy?

2. Research issues. Your policy must deal with the relevant issues and concerns that are specific to your event. Who is the most qualified to define these problems? Who has the better perspective on the issues as they arise? Consider your most important sustainability challenges and whether they match the views of your stakeholders.

3. Talk to stakeholders. One way to address issues with stakeholders is to conduct focus groups. Find out their primary concerns about event sustainability. Another way is to conduct surveys that include sustainable questions to your event's target demographic and past attendees.

Want the COMPLETE list? Download your free checklist here!

6 | USEFUL STRATEGIES FOR A SUCCESSFUL SUSTAINABLE EVENT

As we said before, sustainable events don't have to come at a high cost or even require a ton of additional planning once you create your organization's sustainable event management policy. Take a holistic approach to event planning by leveraging these **six strategies for creating a successful sustainable event**.

1. Find a city and venue with a good, centrally located transportation system. Focus your event activities in one place to avoid unnecessary and costly transportation.

2. Use smart procurement practices that favor socially and environmentally responsible local suppliers. When sourcing catering, for instance, use seasonal, organic, and locally sourced food and beverages, and choose menus with vegetables and poultry dishes over those with red meat.

3. Manage waste by keeping the three Rs of waste hierarchy in mind: Reduce, Reuse, and Recycle. Avoid printing costs by opting for online registration and event apps. Replace plastic cutlery and paper plates and cups with reusables – silverware, china, and glassware. Opt for tap water where possible rather than buying bottled water.

4. Organize team-building activities that give back to the communities associated with your event. Boost your brand by communicating your efforts to organize the event responsibly to all stakeholders.

5. Offset any emissions that were impossible to avoid after the event. There are many certified carbon offsetting project categories like wind energy, waste management, forest management, and agriculture that provide social benefits and offer positive environmental impacts.

6. Consider offering a hybrid event with virtual technology. This will help you to increase your reach, attract new attendees, and reduce your event's carbon footprint.

Besides cutting energy costs and reducing CO_2 emissions, climate-friendly event strategies can also be a **source of event sponsorship and participant goodwill**. By acknowledging your carbon-conscious efforts, you're assuring participants that you are being responsible. In turn, they'll feel better attending knowing that carbon impacts are minimized and mitigated.

Remember, your sustainability plan most likely matches the ideals of many of your current or potential attendees. When you can meet their expectations for the event, they're more likely to participate or come to future events.

7 | 20 WAYS TO ENGAGE ATTENDEES IN SUSTAINABILITY

Looking for practical ways to inspire event attendees to adopt a more sustainable mindset? Encourage eco-conscious choices with the following easy-to-implement conference strategies.

Involve Attendees Before Your Event:

1. Send Pre-conference Communications: Help attendees create a sustainable mindset from the start by highlighting sustainable initiatives in pre-event emails, on your website, and across your event's social media platforms. Highlight your venue's sustainability practices, especially if the building is LEED-certified!

2. Implement a Carbon Offset Program: Offer attendees the option to offset their travel emissions by partnering with a reputable carbon offset program. Communicate the program's benefits and the positive impact of their contribution. Get attendees excited to participate in the program!

3. Create a Sustainable Travel Guide: Partner with your host city's visitor's bureau to assemble a digital guide that highlights eco-friendly transportation options attendees can use such as public transportation, carpooling, and bike rentals near the conference venue and with partner hotels.

4. Establish a Carpooling Hub: Facilitate carpooling by creating a sign-up list attendees can use, or by creating a dedicated carpooling section within your event's mobile app. Create a place where attendees can connect and share rides to and from the conference, partner hotels, and the airport.

5. Offer Sustainable Hotel Options: Partner with hotels that have implemented sustainable practices (i.e., energy efficiency, water conservation, waste reduction, etc.) and highlight these hotels as preferred accommodations. Get attendees excited about using their buying power to support eco-friendly accommodations.

6. Invite them to Sign a Sustainability Pledge: Encourage attendees to commit to eco-friendly actions during their conference experience. Examples may include turning hotel room lights off, declining extra room service, using a reusable water bottle, opting for digital airline passes, etc. Reward participation with a prize or incentive.

Involve Attendees at Your Event:

7. Feature Eco-friendly Event Badges and Lanyards: Make sustainable event badges and lanyards part of your event's brand story! Work with an event supply company like pc/nametag to get attendees excited to wear biodegradable name tags, recyclable event badges, organic cotton lanyards, and more!

(Continued on next page...)



Involve Attendees at Your Event (Continued):

8. Feature an Interactive Sustainability Quiz: During the event registration experience, engage attendees with a fun and educational interactive quiz on sustainability topics related to your event's theme or industry. Reward participation with an exclusive, eco-friendly themed badge ribbon they can wear on their badge.

9. Switch to a Digital Event Program: Minimize paper waste by providing a digital program accessible via a QR on the backs of badges or on your event app. Explain to attendees your decision to go paperless. For example, during your opening session, reveal how many trees were saved by your organization going paperless.

10. Provide Waste Instruction: Ensure your venue supplies recycling, composting, and waste bins for attendees to use. Reduce confusion by providing signage on each bin. Bonus Points: Add the "recycling" symbol to the back of your recyclable event badges to visually remind attendees to recycle their badge post-use.

11. Create a Bring-Your-Own Water Bottle or Coffee Mug Program: Let's be honest: Nobody needs more reusable mugs! Instead, encourage attendees to bring their own reusable water bottles and mugs from home. Offer refill stations throughout the conference venue or have a little fun renting sparkling water machines.

12. Make Attendee Gifts Sustainable: Offer eco-friendly promotional items that won't end up in the landfill. For example, give attendees plantable seed paper, a packet of native wildflower seeds, reusable grocery bags, recycled notebooks, or locally made gifts (like jars of honey or jam) as conference giveaways.

13. Incorporate Sustainability-Themed Philanthropy: Make sustainability a part of your event's philanthropy program! Invite attendees to participate in planting trees, helping pick up trash in nearby parks, or organizing a gently used clothing drive for a local shelter, school, or humanities organization.

(Continued on next page...)



14. Host a Sustainability Award Program: Take advantage of sustainability-related storytelling to draw more attendees to your event! Invite individuals or organizations who are making a difference to share what they're doing to protect the environment. Award winners at a special ceremony.

Involve Attendees After Your Event:

15. Recycle Badge Holders Post-use: After your event has concluded, tell attendees your event is actively reducing waste by inviting attendees to return their badges for recycling. Services like pc/nametag's tag/back Holder Recycling Program ensure holders don't end up in the landfill post-use.

16. Put Together a Social Media Contest: Run a social media contest post-event asking attendees to share their sustainable travel and conference experiences using a dedicated hashtag. Offer prizes for the most creative entries. This provides your team with user-generated content for social media.

17. Conduct a Post-conference Sustainability Survey: Gather feedback from attendees on your sustainability practices (and theirs) throughout the conference. Then, use the data to improve future events. This is a great way to show your commitment to improvement and test the effectiveness of your sustainability pledge program.

18. Consider Digital Swag Bags: Offer digital swag bags instead of physical ones to reduce waste and allow for more personalized content. Invite event sponsors and vendors to include discounts, promotions, educational handouts, and highlights of their offerings (especially if they're eco-friendly)!

19. Partner with a "Plant a Tree" Program: Partner with a tree-planting organization to allow attendees to donate and have a tree planted in their name. Or, offer attendees the option to donate to an environmental cause during registration to support organizations who value sustainability initiatives.

20. Offer a Post-Event Sustainability Report: Get attendees excited to see how their sustainable actions made an impact on your event! Publish a post-event sustainability report summarizing the conference's environmental impact, highlighting key achievements in sustainability.

pc/nametag®

At pc/nametag, we believe sustainability means more than simply producing and providing eco-friendly products and services.

To us, sustainability means being stewards of our environment, using resources wisely, and taking a holistic approach to our social and economic impacts.

It means partnering with you to help your event team accomplish its most ambitious sustainability goals and initiatives.

There's never been a better time to join the sustainability movement!

Visit pcnametag.com/sustainable-events to find inspiration for reducing event waste, including sustainable event badges, lanyards, badge ribbons, attendee gifts, and more!

Use code **EVENTASTIC25** to save 10% on your next order!*
**Expires 03/31/26. See offer details on p. 19 of this toolkit.*



8 | ADDITIONAL RESOURCES



Downloadable: Eco Product Lookbook
See what's trending in sustainable event supplies, from eco-friendly badges to sustainable lanyards, badge ribbons, and more!

→ Check it out!



Service: tag/back Holder Recycling Program
Learn how to partner with pc/nametag to ensure your badge holders are properly recycled post-event instead of ending up in the landfill.

→ Check it out!



Blog Post: Eco-friendly Event Décor
Browse a list of our favorite ways to go green and give back to the community, starting with your event's décor, activities, and workshops.

→ Check it out!



Blog Post: 10 Innovative Sustainability Ideas for Events
Find out how to incorporate sustainable elements into your event strategy with these solutions for making your events more earth-friendly.

→ Check it out!



Blog Post: How to Green Your Event Supply Chain
When looking at sustainable manufacturers and suppliers, what should event professionals look for? What questions should they ask?

→ Check it out!



Blog Post: Supporting Local Business at Events
Read how supporting local businesses can infuse your events with unique character while also supporting your sustainability goals.

→ Check it out!

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TeamBonding
Better teamwork. Happier teams.™

The Event Pro's Playbook for Planning Engaging Team Building Events

Your go-to guide for planning unforgettable team building events. Packed with expert tips, practical checklists, improv games, and insider advice. Everything event pros need to engage teams, boost connection, and make events shine.

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Team Building Event Planning Checklist

1. **Define Event Goals**
   - ▢ Clarify the event's purpose (team bonding, education, celebration, etc.)
   - ▢ Identify key audience demographics and expectations
   - ▢ Establish desired outcomes (morale boost, collaboration, brand awareness, etc.)

2. **Plan the Format**
   - ▢ Select event type (virtual, hybrid, in-person)
   - ▢ Choose appropriate time and date based on audience availability
   - ▢ Align event duration with engagement goals and attention spans

3. **Secure the Right Venue**
   - ▢ Ensure it fits your group size and activity needs
   - ▢ Confirm accessibility (ADA compliance, parking, location)
   - ▢ Check for required tech (AV, Wi-Fi, screens, lighting)
   - ▢ Identify breakout spaces for small group interaction
   - ▢ Create an atmosphere (lighting, music, branding visuals)

4. **Design for Interaction**
   - ▢ Incorporate icebreakers and energizers
   - ▢ Include team building or collaborative activities
   - ▢ Plan interactive elements like games, trivia, or improv
   - ▢ Allow time for informal networking and mingling

5. **Prep Your Hosts/Facilitators**
   - ▢ Book engaging and experienced facilitators or emcees
   - ▢ Provide them with clear event goals and run-of-show
   - ▢ Brief them on audience tone (casual, corporate, creative)
   - ▢ Give them access to tools and support staff if needed

6. **Curate Content & Experiences**
   - ▢ Tailor activities to the group's industry or culture
   - ▢ Add meaningful themes (e.g., wellness, innovation, CSR)
   - ▢ Plan for personalization (name badges, team names, branded materials)
   - ▢ Consider surprise elements (pop-up games, giveaways, VIP guest)

7. **Build Visual & Emotional Engagement**
   - ▢ Design a cohesive theme with signage, decor, and colors
   - ▢ Incorporate branded elements or swag
   - ▢ Use mood-setting elements like music, scent, and lighting
   - ▢ Create photo ops (step-and-repeat, themed props, live artists)

8. **Feed & Fuel**
   - ▢ Offer snacks/meals that are dietary inclusive (allergies, vegan, etc.)
   - ▢ Provide hydration stations and/or signature drinks
   - ▢ Include breaks for energy and conversation

9. **Use Technology Thoughtfully**
   - ▢ Set up digital RSVP and communication tools (e.g., Eventastic)
   - ▢ Use event apps or QR codes for schedules, maps, team lists
   - ▢ Incorporate live polls, games, or social walls

10. **Capture & Follow Up**
    - ▢ Hire a photographer or designate someone to take candid shots
    - ▢ Encourage social sharing with a hashtag or contest
    - ▢ Send a post-event recap or thank-you email
    - ▢ Gather feedback via a quick post-event survey
    - ▢ Share highlights internally or externally

How to Plan an Engaging Team Building Event

STRATEGIC PREPARATION

As an event planner, you're not just coordinating logistics—you're shaping experiences that can create lasting change within a team. When done right, team building goes beyond a single day of activities. It strengthens workplace culture, encourages collaboration, and boosts morale in ways that benefit your client's organization long-term.

But without the right preparation, even the most engaging event can fall flat. From venue coordination to setting expectations, your work behind the scenes makes or breaks the experience.

Use this guide to ensure your next team building event not only runs smoothly, but delivers measurable value.

CHOOSE THE RIGHT EVENT

Clarify Goals:

What is the team hoping to gain—stronger communication, improved morale, better cross-departmental collaboration? Ask early and align the event selection to these goals.

Match Style to the Team:

Consider your client's company culture. Are they more comfortable indoors or ready for outdoor adventure? Do they prefer low-key bonding or high-energy challenges? Recommend event styles—collaborative, competitive, creative, problem-solving—that best fit both the goals and the group's personality.

Account for Special Circumstances:

Take stock of any organizational shifts that may impact group dynamics. When helping clients choose an event, ask:

- Are they onboarding new staff?
- Recently merged or restructured?
- Managing burnout or change fatigue?

The right activity can help teams navigate transitions more smoothly.

PREP YOUR TEAM

Communicate Dress Code Clearly:

If you're coordinating with HR or team leads, make sure messaging about attire—especially footwear—is sent out well in advance.

Rethink the Label:

Encourage clients to refer to the event by its name, not just “team building.” Creative program names like “Gladiator Olympics” or “Escape the Office” pique interest and reduce skepticism.

Avoid Total Surprises:

A little mystery is fun—but blindsiding a team with a full-day activity? Not so much. Provide basic info and let excitement build organically.

Set Expectations:

Ensure clients clearly communicate that full participation is expected and that, unless urgent, distractions like cell phones should be kept to a minimum.

Start (and End) on Time:

As the planner, confirm travel arrangements and schedule buffers. Nothing disrupts energy more than a late start or early departure.

PREP THE EXTRAS

Incentivize:

If appropriate, build in small prizes for winners. A little competition fuels teamwork and boosts engagement.

Strategize Breaks:

If the event is part of a longer agenda or offsite, be strategic. Allow a break between heavy content and the team building portion to reset energy.

PREP THE SPACE

Limit Interruptions:

If you're booking venues, request that catering and breaks happen outside the event space. Activity flow is crucial—mid-event coffee carts aren't ideal.

Maximize Room to Move:

Be sure your venue suits the event's physical requirements. Team activities need ample space for engagement—book accordingly.

Handle Supplies Smoothly:

Select venues that can accept advance shipments of supplies and clarify any fees related to storage or handling. Confirm delivery deadlines with all vendors.

Plan for Weather:

Outdoor events are great—until they're not. Always have a weather contingency and ensure staff on-site are aware of what the event entails (especially if things get noisy or active).

Allot Setup & Breakdown Time:

Build in setup, breakdown, and reset times when reserving space. Factor in any pre-event meetings or transitions that may affect timing.

Fuel the Team:

Plan for snack breaks, especially in the afternoon. Light, healthy snacks and coffee can combat post-lunch energy dips.

WORKING WITH FACILITATORS

Brief Your Facilitator Thoroughly:

Share any relevant team insights ahead of time. This includes:

- Physical or accessibility needs
- Group dynamics (tenure, hierarchy, personality mix)
- Recent company changes or inside jokes
- Leadership involvement (e.g., CEO participating)
- Specific goals for the session

Set Them Up to Succeed:

Trust the process. Professional facilitators are trained to guide your clients through meaningful, results-driven programs. Once the event begins, your job shifts to supporting logistics while they steer the experience.

Avoid Over-Customization:

It's tempting to tailor every detail, but trust your facilitators' expertise. Their frameworks are tested, and over-editing can dilute impact. Focus on alignment, not micromanagement.

EVENT DAY REMINDERS FOR PLANNERS

- ▢ Have all vendor and contact details easily accessible
- ▢ Double check deliveries and room setup timing
- ▢ Ensure the client team knows where to go and when
- ▢ Help manage expectations and set a positive tone
- ▢ Stay available, but let the facilitator take the lead

AFTER THE EVENT

Your job doesn't end when the applause fades. Encourage clients to follow up with their teams and build on the momentum:

- ▢ Send a thank-you message or survey to participants
- ▢ Recommend follow-up activities that align with the event's takeaways
- ▢ Offer options for ongoing team engagement and future events.

When team building works, it's because someone like you made it happen.

HOW TO USE IMPROV EXERCISES TO DRIVE CONNECTION, COLLABORATION AND CREATIVITY

Improv isn't just for actors or comedians—it's one of the most effective tools you can use to help teams loosen up, connect, and strengthen key workplace skills in a fun, low-pressure way. Whether you're running a standalone improv workshop or weaving a few quick exercises into a larger team building event, improv games are powerful tools to increase trust, break down barriers, and spark spontaneous creativity.

THE BENEFITS OF IMPROV FOR TEAMS

Here's why improv works so well in a corporate team setting:

- **Encourages Active Listening:** Improv relies on tuning into others' ideas and building on them. This skill directly translates to better collaboration and communication in the workplace.
- **Fosters a Growth Mindset:** Improv teaches that there are no mistakes—only opportunities. This mindset helps teams become more resilient and innovative.
- **Promotes Psychological Safety:** Laughter and play level the playing field, allowing team members to feel more comfortable speaking up, taking risks, and supporting one another.
- **Improves Adaptability:** The unexpected is part of the game. Improv helps people get comfortable with thinking on their feet—an essential skill in today's fast-paced work environments.
- **Builds Trust:** Many improv games require teams to rely on each other in real time, creating a shared sense of success and fun.nsure the client team knows where to go and when

TIPS FOR IMPLEMENTING IMPROV EXERCISES SUCCESSFULLY

You don't have to be a performer to run improv. These exercises are designed to be accessible, energizing, and fun for all types of participants. Here's how to get the most out of them:

1. **Set the Stage:**
   Many improv games require teams to rely on each other in real time, creating a shared sense of success and fun.nsure the client team knows where to go and when

2. **Start Small**:
   Begin with light, low-stakes activities. Use warm-ups or icebreakers to ease people into the flow before diving into more interactive or vulnerable games. Choose exercises that match your group's energy and comfort level.

3. **Celebrate Participation, Not Performance:**
   Make it clear that simply participating is the win. Laugh with, not at, one another. Focus on connection, not perfection.

4. **Debrief the Experience:**
   After each exercise, take a moment to reflect. Ask questions like:
   a. How did that feel?
   b. What did you notice about how you communicated?
   c. How might this apply to your work together?

   These short discussions help translate the fun of improv into real-world learning.

5. **Mix and Match:**
   Use improv games as energizers during long meetings, as connection builders for new teams, or as a way to shake off stress before diving into problem-solving sessions. They can stand alone or be paired with other activities.

Team Building Activity: YES, AND...

The goal of this game is to create a scene or story collaboratively by agreeing with and building on each other's contributions. Here's how it works:

1. Partner the players and ask them to decide who is A and who is B.
2. Ask A to make a statement ("The lunch today was great.").
3. B is to reply with "Yes, and. . ." and make another, somewhat related statement ("Yes, and we got to eat two desserts!").
4. A continues with "Yes, and. . ." ("Yes, and then I had tons of energy from all the sugar.").

The participants should continue this exercise for an allotted period of time. This is not a game that anyone should be trying to win. The goal is to practice communication.

Post-activity debrief questions:

- What are the obstacles to agreement?
- How does it feel to be consistently agreed with and consistently agree?
- What was it like to unconditionally listen so intently to someone? To be listened to?
- Was it easy or difficult to build upon what each other was saying?
- How can this technique be helpful to you while working with others?

Team Building Activity: PASS THE CLAP

This game helps improve team coordination and communication skills in a playful and engaging way. Here's how it works:

1. Have all participants stand in a circle, facing each other.
2. Inform the participants that the goal is to pass a single clap around the circle as quickly and smoothly as possible.
3. One person begins by making eye contact with the person to their left or right and then clapping their hands together.
4. The person who receives the clap then repeats the action by clapping their hands and making eye contact with the next person in the circle, thereby passing the clap.
5. The clap continues to be passed around the circle in this manner. Encourage participants to maintain eye contact and be ready to react quickly to keep the flow going smoothly.
6. Once the group gets the hang of the game, challenge them to increase the speed at which they pass the clap around the circle, aiming for a seamless and quick transition.
7. For added challenge and fun, you can introduce variations such as changing the direction of the clap, sending multiple claps around the circle, or adding verbal sounds along with the clap.

Team Building Activity: COUNT TO 20

Count to 20 is a simple and engaging exercise that helps participants practice patience, active listening, and group coordination. Here's how it works:

1. Have all participants stand in a circle, facing each other.
2. One participant starts counting by saying "1" aloud.
3. Another participant (not the one who just spoke) must then say "2," followed by another saying "3," and so on.
4. If two participants say a number at the same time, the group must start over from "1."
5. There is no predetermined order or signaling. Participants must listen carefully and be aware of when to speak.
6. The game continues until the group successfully counts to 20 without any overlaps.

Team Building Activity: PARTY QUIRKS

Party Quirks is a popular improv game that combines creativity, quick thinking, and humor. It involves one player guessing the unusual characteristics or identities of the other players, who act as party guests with assigned quirks. Here's how the game works:

1. Select a host. This person will temporarily leave the room or wear a blindfold so they cannot hear the quirks being assigned.
2. The remaining players (the guests) are each assigned a unique quirk by the group, ranging from specific characters ("thinks they're a superhero") to odd behaviors ("speaks only in questions").
3. The host then returns to the room and the game begins.
4. One by one, the guests enter the party, acting out their assigned quirks or identities. The guests interact with the host and each other, maintaining their quirks throughout.
5. The host observes the guests' behavior and tries to guess each guest's quirk or identity. They can make guesses out loud and interact with the guests to gather more clues.
6. Once the host has correctly identified a guest's quirk or identity (or if they give up), the guest confirms it. The game continues until the host has identified all the guests' quirks.

Team Building Activity: EXCUSES, EXCUSES

Excuses, Excuses is a fun and interactive party game that revolves around creativity, quick thinking, and humor. It involves participants inventing and delivering excuses for various situations. Here's how the game works:

1. Gather players – this game works best with a group of at least four people.
2. Prepare a list of scenarios or situations where someone might need to give an excuse. These can be written on cards or simply thought up on the spot.
3. Choose one player to be the judge for the first round. The judge will present the scenario and decide which excuse is the best.
4. The judge presents a scenario to the group. For example, "Why were you late to work today?" or "Why didn't you do your homework?"
5. The other players take turns coming up with creative, funny, or outrageous excuses for the scenario. Each player delivers their excuse to the group.
6. After hearing all the excuses, the judge selects the excuse they found the most amusing, creative, or fitting.
7. The player with the best excuse becomes the judge for the next round, and a new scenario is presented. Continue rotating roles so everyone gets a chance to be the judge.

What's Hot in TeamBonding



Virtual Activities

Bond your team—no matter their location! Our virtual team building activities are designed to inspire real connection, spark collaboration, and keep remote teams engaged, supported, and thriving.
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Atmosphere
Board Game Speed Networking
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C'mon Down! *
Center of the World
Corporate CSI *
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Corporate Quiz Bowl
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Domino Effect
Game of Drones
iBuild *Virtual
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Integrity
Outrageous Games
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Quickfire Olympics
Sand Sculpting
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Squad Game
Star Games
STEM Speedway
Summer Camp Throwback
Tabletop FASTCAR
Team Disc Golf
Team Synergy
The Chocolate Challenge *Virtual
Ultimate Tailgate Challenge
Wild Card Bingo *Virtual

COLLABORATIVE

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Bridging the Divide
Chain Reaction Tabletop
City Build
Full House
Meditainment
Nexus Speed Networking
Product Pipeline
TeamProv *Virtual
The Big Picture

ESCAPE GAMES

Beat the Box
Escape the Maze
Escape the Mob *Virtual
The Infinite Loop *Virtual

CHARITABLE

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Build-a-Birthday
Charity Guitar Build
Clean Water Connection
Cooking For A Cause
Everyday Superheroes
Foodbank Showdown
Generations of Giving
Go Give - Charity Challenge
Healthcare Heroes
Helping Hands
Hope for the Holidays
Hope*full* Handbags
Just Roll With It - Skateboard Build
Little Team Library
Mission ImPAWssible
Mr. Roboto
Operation Cancer Care
Operation Military Care
Paint Soles For Souls
Paws For A Cause
Play it Forward Gameshow *Virtual
Prosthetic Hand Project
Rollator Walker Build
Team Teddy Rescue Bear
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The Big Give
The Charity Bike Build
The Donation Station
Tools for Schools
Toys for Tykes
Wheels Around the World
Wheelchairs in Motion

CULINARY

Chili Cook-Off
Dining In The Dark
Food Truck Challenge
Gingerbread House Hunters *Virtual
Great Appetizer Challenge
Just Desserts
Let Them Eat Cake
Murder Mystery Dinners *Virtual
Progressive Dinner
Salsa Showdown
Ice Cream Challenge
Team Chocolatier *Virtual
Team Cuisine
Team Mixology *Virtual
The Chocolate Challenge *Virtual
Ultimate Pizza Challenge
Winery Team Challenge *Virtual
Wicked Good Chowda Cook-off

BONDING BUSES

Do Good Bus *
Music Bus
Mystery Bus

* = Charitable Option Available

* = Available Virtually

TeamBonding

Better Teamwork. Happier Teams.™

200+ Customizable Team Building Events to Choose From

For a detailed description of our events, please click on the title you're interested in.









LEARNING & DEVELOPMENT

Improv for Team Building *Virtual
Breaking Barriers
Change Management
DiSC™ Training
EcoPitch - Sustainable Challenge *
Effective Communication
Emotional Intelligence
Global Innovation Game *Virtual
Human Skills
Humor that Works
Integrity
Jeopardy!® *Virtual
Laughter Yoga *Virtual
Leadership Stories
MBTI® - Myers-Briggs Type Indicator
Team and Leadership DNA *Virtual
Team PechaKucha
Team Resilience Training *Virtual
Team Wellbeing
Strengths Finder 2.0
The Haka Team Building

SCAVENGER HUNTS

Amazing Race
City Explorer
Day at the Museum
Mad Dash
Team-opoly
Polaroid Scavenger Hunt
Pub Crawl Scavenger Hunt
Sleuth: The Murder Mystery
Spy Hunt
Venue Explorer

MUSIC & RHYTHM

Beatswork
Team Songwriting Experience
Boom Time
Crescendo
Drumming Up A Team
Sound Crowd
Global Music Festival *Virtual
Playing the Blues

VIRTUAL EVENTS

Almost Anything Goes - Online Trivia
An Attitude of Gratitude
Around the Virtual Campfire
Chocolate Truffle Making
Chocolate Tasting Experience
Cookie Tales - Decorating Kits
Elephants on Mars
Employee Wellness
Escape the Blizzard
Haunted House Virtual Escape Room
Impact Online *
International Food Tour
Majority Rules
Master Mentalist - Jon Stetson
Museum Scavenger Hunt
Picture This: Virtual
Professional Development Workshop
Quickfire Olympics Online
Race Around the World
Rogue Agent - Virtual Escape Room
Say Cheese - Mozzarella Making
Sherlock Holmes - Murder Mystery
Sight Unseen
Sketch It Forward Greeting Cards *
Solve a Rubik's Cube
Summit to Success
Team Painting
Team vs Machine AI Challenge
The Corporate Tonite Show
The Best Dueling Piano Show
The Climate Change Challenge *
Ultimate Virtual Team Building Event
Virtual Balloon Twisting Workshop
Virtual Casino Night
Virtual Crime Scene Investigation
Virtual Global Music Festival
Virtual Office Party
Virtual Poker Tournament
Virtual Taskmaster
Virtual Team Connections
Virtual Training Workshops
WFH Scavenger Hunt

CUSTOM TEAM BUILDING

Looking for a custom company team building event for a special conference theme, favorite management book, ideal training model or a unique set of learning outcomes? Whether you're looking to run a custom 1,500 person scavenger hunt, indoors *(been there)* or support a new cause in your community *(done that)*, we've got your back. Your needs are unique, your team is original and we never take a one size fits all approach at TeamBonding. When our existing programs just don't cut it, we pull out all the stops to help you build a 100% customized program for your team.

* = Charitable Option Available * = Available Virtually

Let Us Help You Plan the Perfect Team Building Event!

Ready to turn your next team building event into something truly impactful? Whether you're just starting the planning process or looking for fresh ideas, we're here to help.

Visit us: TeamBonding.com

Call us: 1.877.472.2725

Email us: Hello@TeamBonding.com



TeamBonding
Better teamwork. Happier teams.™

GUIDE TO CHOOSING WHO TO SEND TO IN-PERSON EVENTS

How to staff your Booth for Maximum Impact and Avoid the Common Mistakes

Most companies pick their trade show team the wrong way. They default to subject matter experts, seniority, or whoever's available — and then wonder why booth ROI is flat, leads go cold, and reps are burned out by day two.

This guide lays out a clear, no-BS approach to deciding who actually belongs at your booth. It's based on what actually drives engagement, conversion, and pipeline — not ego, job title, or tribal booth staffing traditions.

Stop Sending Subject Matter Experts Just Because They're Smart

Why? Because trade shows are chaotic, noisy, and full of distractions. The booth isn't the place for deep technical dives — it's the place for quick, compelling exchanges that spark post-show interest. The person who knows the product best isn't always the one who can pitch it well.

Prioritize people with High Social Energy

If you take nothing else from this guide, take this: **Send people who energize the room**. Trade shows are long. They're physically demanding. Your booth staff will have 50+ micro-conversations per day, sometimes on 3 hours of sleep. You don't need someone who knows the roadmap — you need someone who can pull attendees in like a human lasso.

Look for Efficient Communicators

It's not just about charisma — it's about clarity and control.

Great booth staffers can:

- Quickly qualify whether someone is a real lead
- Deliver a crisp value prop in <30 seconds
- Know when to end a conversation (yes, this is a skill)

Use Trade Shows to Onboard New Team Members

This might be the most underrated tip in the guide. Sending new hires to trade shows is an amazing way to immerse them in the customer voice, expose them to real-time objections, pain points, and use cases, & help them build cross-functional relationships on the ground

AS A REMINDER, EXPERTISE IS NOT ENOUGH!

You can bring a technical expert — just make sure they're:
- Friendly
- Conversational
- Not allergic to eye contact

Because the person who's "the smartest on the team" but can't hold a conversation? They'll quietly kill the vibe of your booth and burn valuable prospects with awkward exchanges.

TL;DR - Who Should You Send?

TRAIT	SEND THEM?	WHY IT MATTERS
High Social Energy	✓	They pull people in and keep momentum high
Efficient Communicator	✓	They qualify leads and spark next steps
New Hire, Curious & Coachable	✓	Great for learning and cross-team exposure
Technical Expert Who Can Talk to Humans	✓	Use sparingly, and only if they're engaging
Quiet Genius Who Hates Small Talk	✗	Book them for post-show demos instead

READY TO STOP WINGING IT?

Mobly helps event marketers automate lead capture and enrichment, ensuring no leads are lost. Want more ways to maximize impact at every in-person event?

BOOK A DEMO


A Yes&
Approach
to Events

When Jay and the GURU Media Hub team came to us a few years ago with the seed of an idea for GURU Events, we could have easily told them all the reasons why it may not work. Instead, aligning with our ethos, we said **“Yes, and...”** We nurtured that seed and found a way to make even the wildest ideas come to fruition.



OUR APPROACH

Our approach to events is simple: anything and everything is on the table... and stage... and expo floor... and breakout rooms... and beyond! It's how we've helped countless clients, like GURU Events, deliver exceptional experiences.

In this guide, we'll walk through key elements to think about and tips on how we approach building events.

1 GOALS

2 THEMING & BRANDING

3 SPONSORSHIP

4 CONTENT

5 YES... *AND*

GOALS

Boring but true, it always starts with goals.
Rather than just KPIs, start with:

A: “What do I want my attendees to feel/come away with? ”

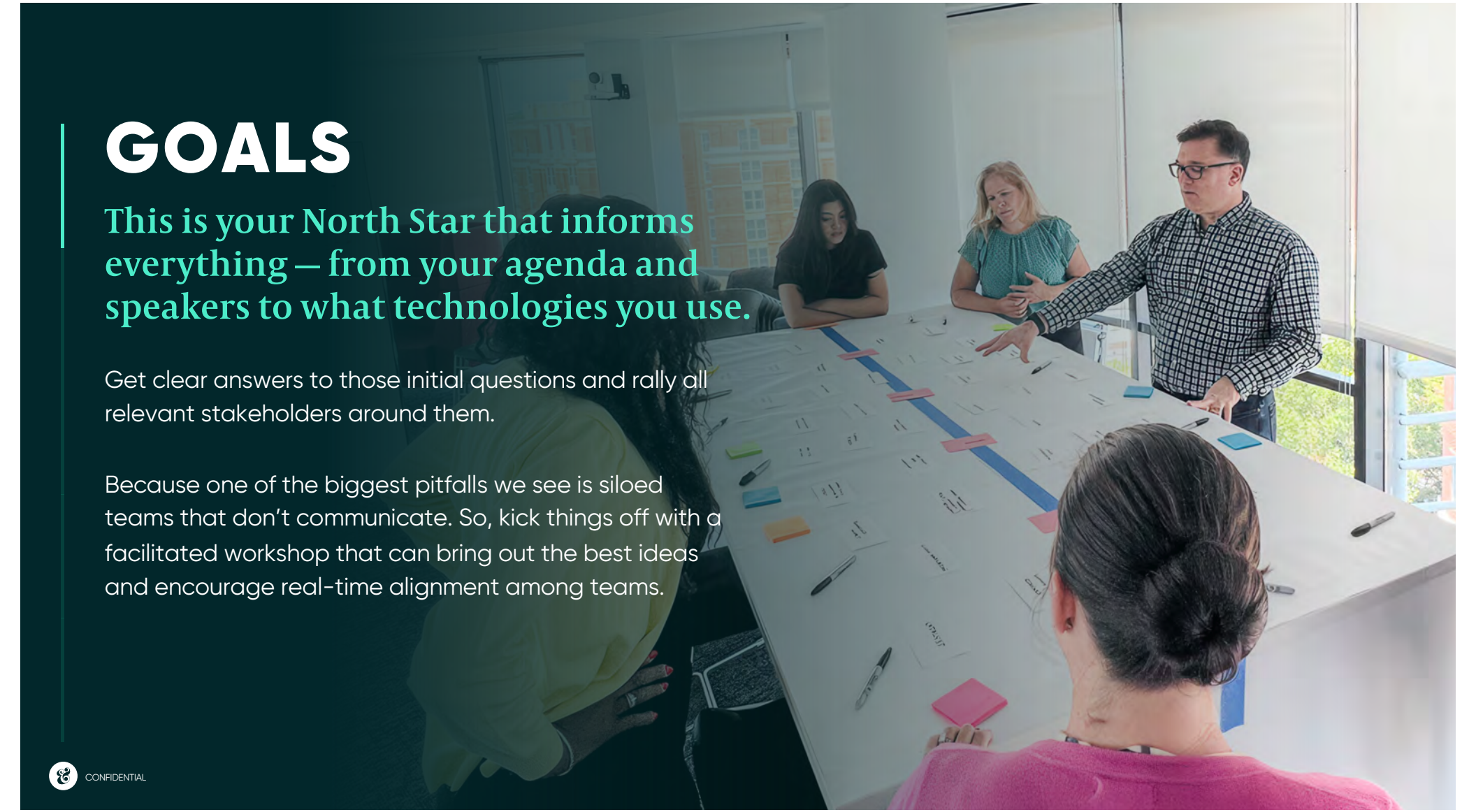
B: If you’re going to engage partners or sponsors, “How can I make it easy and exciting for an organization to support my event?”

GOALS

This is your North Star that informs everything — from your agenda and speakers to what technologies you use.

Get clear answers to those initial questions and rally all relevant stakeholders around them.

Because one of the biggest pitfalls we see is siloed teams that don't communicate. So, kick things off with a facilitated workshop that can bring out the best ideas and encourage real-time alignment among teams.



THEMING & BRANDING

What's in a name? As it turns out...a lot!

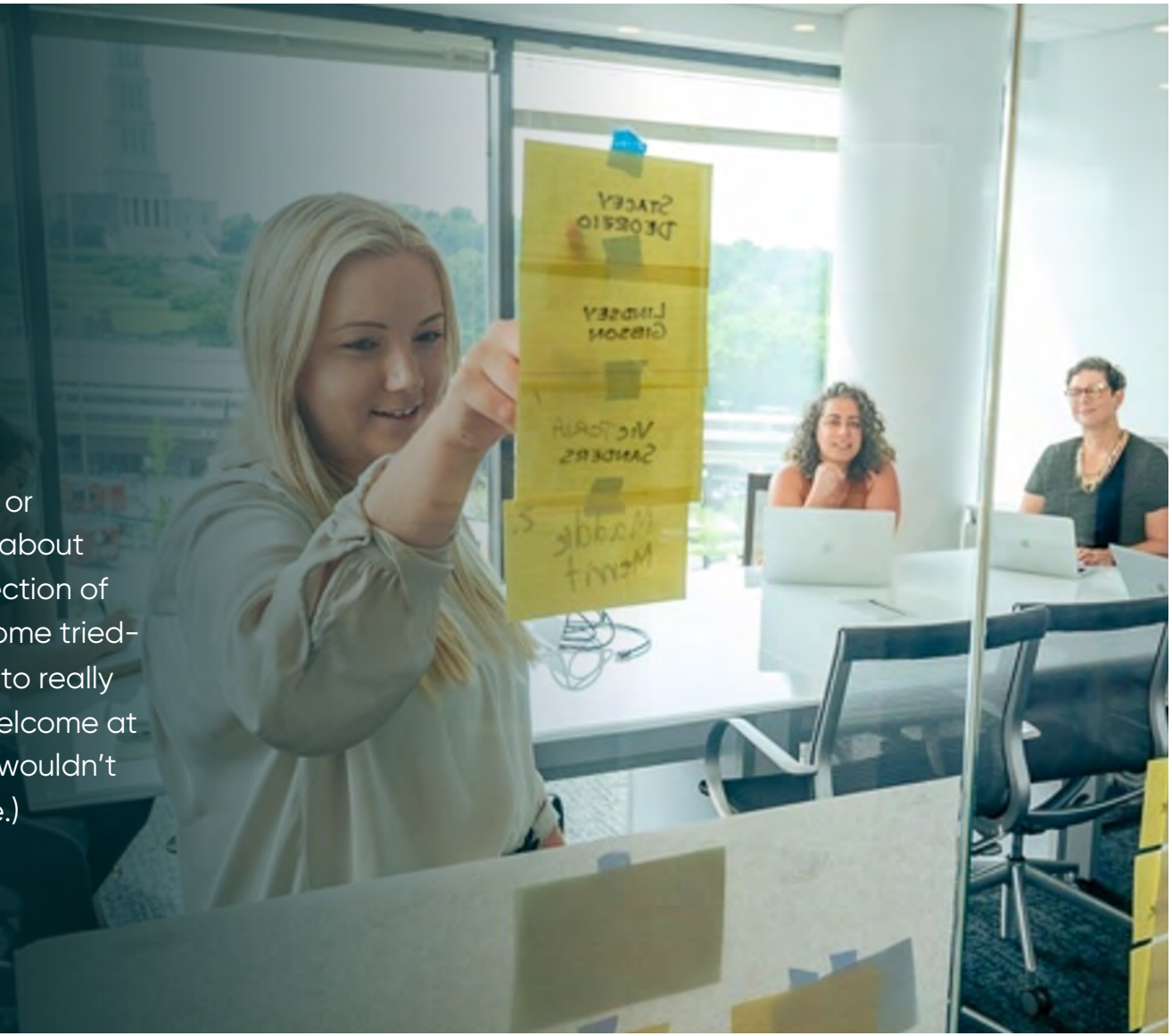
Theming your event sets the tone for what people can expect, and along with your brand, is the glue that holds it all together. It's not just a convention or a conference or an annual meeting... it's the [Brilliant-Name-That-Pairs-Your-Mission-And-Strategy-While-Resonating-With-Attendees-Sponsors-And-Dare-We-Say-The-World!] event. More simply, it's what will set you apart from other events.



THEMING & BRANDING

How we start...

We typically explore key organizational or industry initiatives that may drive ideas about theming. We then like to take a cross section of team members to brainstorm ideas — some tried-and-true experts and some fresh faces to really help us with our thinking. All ideas are welcome at this stage; there's not a "no" in sight. (It wouldn't make sense. "Yes" is literally in our name.)



THEMING & BRANDING

As you get into branding, you'll want to explore whether:

- Your event's brand is an extension of your existing brand; or
- A sub brand that, while closely tying to your overarching brand, has elements that make it stand on its own; or
- A new brand that closely ties to that year's theme.

However you choose to develop your event's brand, it must always stay true to your organization and deliver on its promise to attendees.





SPONSORSHIP

Sponsorships aren't just revenue streams — they're relationships.

And in today's evolving landscape, sponsors are looking for more than logos on lanyards. This requires a mix of tiered packages and custom activations to ensure that your needs and your partner's goals are met, all while enhancing the attendee experience.



SPONSORSHIP

Tips to get you started:

- Look for inspiration at events you attend.
- Don’t be afraid to ask potential sponsors what they are interested in.
- Be clear and specific in your offerings and agreements so that expectations are set.
- Dedicate a liaison to your sponsors so that they can manage and nurture the relationships.





CONTENT IS KING *AND* QUEEN

… heck, the whole royal family!

The key to building and sustaining strong attendance is to create compelling content:

- Strong abstracts that bring clarity, cohesion, and interest to your programming.
- Branded graphics, videos, and interstitial animations that add dynamic visuals across the event.
- A variety of formats that speak to a variety of people and keep things fun and fresh.

LAST BUT NOT LEAST, YES... *AND*

Open your mind to a world where everything is possible, no matter the feasibility or cost.

Once you start planning and refining, you'll find creative ways to make the unreal real — sometimes through modifications, compromises, or sponsorships. You may still find that other ideas might not materialize at all... yet. Next year could be a whole different story — especially with us by your side!



LAST BUT NOT LEAST, YES... *AND*

At Yes&, we don't just plan events — we design experiences that connect people, spark action, and drive industries forward.

Contact us today to see how we can help.







VIBE EVENTING WORKBOOK

A Self-Audit & Action Plan for Events That Actually Make Eyes Light Up

By Dahlia El Gazzar



SECTION 1: THE VIBE CHECK

RATE YOUR LAST EVENT HONESTLY (1 = FLAT, 5 = FIRE):

Did your audience's Eyes Light Up at least once every hour?

1 2 3 4 5

Were there surprise moments that people still talk about?

1 2 3 4 5

Did attendees make new connections because of your design (not luck)?

1 2 3 4 5

Did sponsors or partners co-create value, or just slap their logo around?

1 2 3 4 5

Was your content emotionally charged—or just fact-stuffed?

1 2 3 4 5

Did your event acknowledge or embrace the current chaos (economic, political, industry)?

1 2 3 4 5

SCORE YOURSELF:

- → **0–10** = Vanilla Zone (help, you're melting!)
- → **11–25** = Rocky Roading (you're halfway there)
- → **26–35** =Baileys Infusion (baby, you're in VIBE EVENTING mode)

SECTION 2: YOUR VIBE PLAYLIST

FOR EACH PART OF YOUR EVENT, WRITE ONE *VIBE-FORWARD* MOVE YOU WILL TEST:

PART OF EVENT	VANILLA RISK	VIBE MOVE I WILL TRY
Opening Moment	Boring housekeeping	Surprise activation or audience poll
Tech Touchpoints	Clunky or invisible	Use AI matchmaking or real-time summaries
Sponsorship Activations	Logo walls, static booths	Create co-branded experiences or live demos
Networking	Random coffee chats	Curated topic lounges or WTF confessionals
Content + Speakers	Overstuffed panels	Story-driven keynotes, wildcard questions
Closing	Weak wrap-up	Crowdsource takeaways, audience mic drops



SECTION 3: THE ELU METER

MAP THE "EYES LIGHT UP" MOMENTS YOU WANT TO DESIGN.

WHERE WILL YOU.....

1. SURPRISE THEM?

Surprise moments break expectations and create excitement. This could be an unexpected guest, a sudden change in environment, or a unique activity.

2. DELIGHT THEM?

Surprise moments break expectations and create excitement. This could be an unexpected guest, a sudden change in environment, or a unique activity.

3. CHALLENGE THEM?

Challenging moments push participants out of their comfort zone, encouraging growth, learning, or new perspectives.

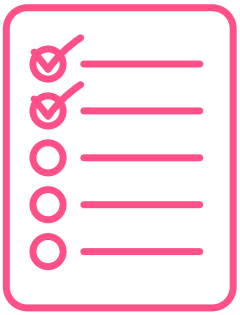
4. HOLD SPACE FOR CHAOS?

Chaos isn't negative—it's about allowing for spontaneity, creativity, and unplanned interactions. This could be open networking, improv, or collaborative problem-solving.

5. REFLECT THEIR VOICE BACK TO THEM?

This is about making participants feel heard and valued. It could be through live polling, Q&A, group discussions, or showcasing participant contributions.

SECTION 4: YOUR UNFILTERED ACTION PLAN



WRITE *ONE* COMMITMENT YOU WILL MAKE THIS MONTH TO:

- [x] Cut the vanilla
- [x] Raise the vibe
- [x] Design for real human energy

MY BOLDEST NEXT MOVE WILL BE:

I WILL MAKE THIS HAPPEN BY (DATE):

CALL IN THE QUEEN

DAHLIA+ AGENCY



You don't have to vibe alone.

Want a private strategy jam with

DAHLIA EL GAZZAR

Bring your agenda, your event mess, your wildest dreams.
We'll vibe it up together.

Book your session here