

ITA GROUP EBOOK



A comprehensive guide to event strategy

7 expert tips for impactful event design

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Events energize B2B marketing plans

Event strategy connects the *why* (business purpose) to the *how* (event design). There are lots of good reasons to bring people together. Events are for celebrating wins, motivating employees, generating leads and establishing your organization as an industry leader.

But there are some compelling cases against events, too.

- > Budgets are shrinking
- > It's a struggle to meet changing audience expectations
- > The return on past events is unclear

Those concerns are valid, but they underestimate the magic of shared experiences and their power to transform the marketplace and earn audience loyalty.

Strategically designed events require expertise and imagination. Confidence comes with a mix of strategic planning and trusted partnerships. Event marketers can use this ebook to learn innovative ideas and meet ITA Group team members with deep expertise in planning global meetings and incentive trips.

52%

of businesses believe that events provide the greatest ROI compared to other marketing channels.

—CONFERENCE SOURCE

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Define why

Know what success means to you

Begin planning with the end in mind—clarity around the business purpose and audience expectations is critical. Proactively discuss and document who the event should serve and what you anticipate as outcomes. Coming to a consensus is important as post-event reporting will track back to these goals.

Define the event purpose

1. What specific outcomes do you want to achieve?
2. How do these goals align with your business objectives?
3. What metrics will you use to measure success?
4. How will the event contribute to your brand's reputation?

Understand the target audience(s)

1. What audience pain points/challenges do you need to address?
2. What motivates them?
3. What behaviors do you want attendees to adopt?
4. How will you tailor your event experience to resonate with different attendee segments?
5. What unique value does your event offer compared to your competition?

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Create a simple visual to tie business goals to the event audience, format and how you'll measure success.

EVENT GOAL	EVENT TYPE	EVENT METRICS
Engage, educate and inspire the sales force	Sales kickoff	<ul style="list-style-type: none">> Achieve X% success rate on post-event product, solution or service knowledge quiz> Meet desired satisfaction and corporate loyalty scores via post-event surveys
Generate or nurture a network of end-user brand advocates Engage and educate channel partners	Conference or expo	<ul style="list-style-type: none">> Achieve X% attendance> Build the sales lead database by X> Create \$X in on-site product sales> Realize an X% post-event increase in sales> Achieve X hits, shares, impressions and/or mentions via social media promotion
Promote a new product, solution or service to a specific audience	Product launch	<ul style="list-style-type: none">> Generate X% in resulting product sales> Build the sales lead database by X> Achieve X hits, shares, impressions and/or mentions via social media promotion

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EXPERT TIP: Set an event vision

Event visioning ensures you align every aspect of the experience with your business, your brand and your audience. Proactively bring together perspectives from sales, marketing, HR—even sponsors. Once the planning begins, your event vision serves as a North Star, guiding all decisions toward the agreed-upon goals. Because everyone's been brought into and bought into the process, there's shared accountability.



MEET THE EXPERT
Becky Vodilko
Events Solution Advisor, Cleveland, Ohio

From leading strategy on the RFP process to helping clients navigate obstacles, Becky provides 22 years-worth of knowledge in meeting and events operations and strategy. Her passion for connecting people to share ideas, build relationships and celebrate success drives her human-centric approach to event design.

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Connect the event to attendee needs and desires

Attendee expectations are always changing. Do your homework prior to each event, like understanding who's coming and designing for personalization and inclusion. With multiple generations in the workforce, creating unique experiences that fit the needs and values of a diverse group of attendees is essential.

1 First, plan your ideal attendee list. Think about who you want to attend and use what you know about them to entice them to commit. The following questions will help you identify and target your ideal attendees.

- > **WHO** are your ideal attendees and influencers? Your sales team, current clients, prospective clients, past event attendees or industry leaders? Or a combination of the above?
- > **WHY** are they interested in you? Better yet, why are you interested in them?
- > **WHAT** do they value? Meaning, what will catch their interest and get them to your event?

2 Then, personalize. Once you solidify your prospective attendee list, consider what you want them to think, feel and do pre-event, during the event and post-event.

- > If you're hosting an event that includes a combination of attendee types, create tracks for each role
- > Cross-pollinate people in different roles who share similar interests with hands-on activities to promote networking
- > Include surveys about content and other preferences as part of the registration process to personalize their journey

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EXPERT TIP: **Let attendees sway your destination choice**

Start your destination selection process by considering your audience and their connection with your brand. Are they annual attendees? Channel partners who compete for trips from other brands in addition to yours? Regionally or internationally dispersed teams?

It's tempting to assume what locations will excite attendees most. But digging deeper into audience preferences will help you create a stronger connection. Based on what matters most to attendees, invest in areas that will make an impact. This might mean opting for a more affordable destination so that a bigger allowance goes toward wraparound excursions and over-the-top off-site opportunities.



MEET THE EXPERT

Jodi Swailes

Event Destination Strategist, Des Moines, Iowa

Jodi excels at destination and partner sourcing, contract negotiations, program design, and budget development. She's spent 25+ years designing detailed experiences that build long-lasting emotional connections between attendees and brands.

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EXPERT TIP: Watch Millennial and Gen Z travel trends

By 2025, 75% of U.S. workers will be under 40 years old, according to a Deloitte predictive analysis. More Millennial and Gen Z employees will be eligible for leadership roles and incentive travel experiences. Their values differ from older professionals, and event design must evolve to meet their expectations.

Connect passion with purpose

Younger event audiences prioritize interactive sessions. Globally conscious Millennial and Gen Z attendees think about the environmental and social impacts of their travel. Communicating the event's sustainability initiatives and designing socially responsible opportunities builds a deeper sense of connection to both the destination and your brand.



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Prepare meaningful partnerships

We've helped companies announce charitable contributions as part of an event's closing ceremonies. Others go all in by hosting hands-on give-back experiences. Our client, Conga, engaged employees in building playground equipment and a climbing wall at an orphanage during an action-packed trip to Morocco. Other attendees delivered school supplies. [Read more of the story.](#)

Delivering that level of impactful immersion certainly takes planning and partnerships, but it was a top-rated experience across generational divides.



KIDS CRAFTS CREATE COMMUNITY

Conga attendees gave back by getting creative with kids from a local orphanage.



MEET THE EXPERT

Erica Lalk

Sr. Manager, Event Strategy Team Leader, Waverly, Iowa

At the heart of Erica's approach is her commitment to building strong, trusting relationships with clients. Drawing from her 17+ years of planning and operating global events and incentive trips, she offers fresh ideas that elevate the attendee experience and create sustainable solutions.

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Engage attendees at each phase

Map personalized communications to the attendee journey. This reinforces what you want them to think, feel and do at each phase. An omnichannel approach ensures your message resonates with attendees, prompting them to share it. Here are a few examples from our own creative team.

Attract: Early birds and sponsors

- > **Launch early:** Make a good first impression. Include critical logistical details like dates and locations
- > **Communicate value:** Make sure prospective attendees and partners understand what's in it for them
- > **Build excitement:** Hype the event with a compelling "why," like a trending destination and noteworthy speaker lineup

MUST-HAVE ELEMENTS

- > Optimized event website
- > Compelling sponsor prospectus
- > Teaser communications and gifts



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Engage: Online and in person

- > **Extend the theme:** Bring your brand and event theme to life with immersive on-site graphic displays, events and swag
- > **Create connection:** Use the event app and social media to help attendees connect with each other
- > **Gamify participation:** Leverage technology to increase participation and check for how much attendees are learning

MUST-HAVE ELEMENTS

- > Graphics toolkits for speakers and sponsors
- > Boutique-style gifting

Retain: Post-event follow-up

- > **Keep up the hype:** Use post-event communications to help attendees re-live the memories
- > **Reinforce takeaways:** Share content that highlights insights and resources that establish you as a thought leader and build your brand

MUST-HAVE ELEMENTS

- > Video highlight reel
- > Feedback survey



Sample communications plan

LAUNCH

ELIGIBLE AGENCIES
100% of eligible agencies

Oct Ideation, brand identity and creative execution

Dec Microsite
Reveal video
Announcement mailing

Q1 Composer name generator



Brochure plays classical music when opened



QUALIFICATION PERIOD

75% of eligible agencies

50% of eligible agencies

Q2 Quiz

Q3 Encore video



25% of eligible agencies

Q4 Last-chance mailing

TRAVEL EXPERIENCE

Winners

Apr Registration website
Final trip mailing
Trip operation

POST-TRIP EXPERIENCE

Winners

May Survey
Video highlight reel



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EXPERT TIP: Design and communicate for sustainability

Events should be all about making a positive impact—even when it comes to the environment. Organizations that prioritize corporate social responsibility want to trim waste wherever possible. **As partners, we're committed to using sustainable, ESG-friendly methods and materials.**

- > Source recycled and reusable materials (omit event dates so assets like banners can be reused year after year)
- > Look for local vendors to decrease shipping impact and support the local economy.
- > Use pre-trip communications to highlight how attendees can minimize their environmental footprint
- > Include on-site reminders and adequate signage to encourage sustainable choices
- > Properly dispose of (and ideally, recycle or repurpose) items at the end of the event

Weaving sustainability considerations into planning and communications from the start helps minimize post-event discards.



MEET THE EXPERT

Meredith Peck

Creative Director, Des Moines, Iowa

Meredith is our go-to for creating start-to-finish communications campaigns. She gives every touchpoint a human feel. From pre-trip to on site, she weaves a story that transforms events and incentive travel programs into lasting memories.

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EXPERT TIP: **Expand reach through speaker and sponsor promotion**

Event speakers and sponsors want to present to a packed audience that's interested in their message. Use this to your advantage by engaging them as event ambassadors. When they post about your event on their channels, they open new prospect pipelines. Make co-promotion easy. Give speakers and sponsors unique early-bird promo codes to include in their newsletters, mention on podcasts and post to social. Recognize and reward whoever brings in the most first-time attendees by a certain date.

Get creative with sponsorship support

Sponsor funds can underwrite unique and memorable experiences for attendees. Co-branded photo albums turn an events recap into marketing opportunities. If sponsors are already paying for multiple engagements, think about including add-ons to increase the value, like a series of webinars to boost sponsors' visibility all year long.



MEET THE EXPERT

Mark Fisher

Senior Sponsorship Event Manager, Palm Springs, California

Mark has created event marketing plans for some of the largest high-tech tradeshows, meetings and events during his decades in the industry. Mark makes partner satisfaction a top priority.

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Take an immersive approach to maximize emotional connections

Swap slide-filled general sessions for the brain-changing magic of immersive experiences and watch what happens. Novelty is a key influence that invigorates attendees. Moments of surprise and delight “break the script” from what’s expected and instantly elevate the energy in the room.

Weaving novelty into event content could involve keynotes that reject the “sage on the stage” role and encourage attendees to share, too. For one client, we brought in an interactive keynote organization to help participants dig deep into a personal story until they could distill it into a few words. The participants wrote this “brain tattoo” on their arms, then were photographed. The images are a testament to their strength of character and a reflection of who they are on the inside.



Explore behind the scenes and get hands-on

Other novel ideas include those “never in my wildest dreams” opportunities that could only happen with longstanding partnerships. For example, hosting a private viewing of Leonardo da Vinci’s The Last Supper during an incentive trip to Milan. Turning a welcome event into a give-back. Creating a paint-by-number mural on the side of a nonprofit headquarters. Mailing a postcard after the event to preserve the memory and help remind attendees of their collective impact.

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Today's event formats must evolve to accommodate shorter attention spans, increased interest in collaboration, digital-first relationships and moments that matter. Immersive experiences that highlight new places and introduce fresh faces create a lasting impression.



HOW DO YOU INSPIRE AUDIENCES?

Get advice on creating immersive event experiences.



OUT	IN
Guessing what will resonate best with your audience	Co-creating with attendees for maximum impact
One-size-fits-most attendee journeys	Personalized journeys with data segmentation
Sightseeing at the most popular tourist attractions	VIP experiences with cultural immersion
Off-the-shelf swag and gifts	Thoughtfully curated gifts that tie back to the destination and event
A rinse-and-repeat approach to annual offerings	Event traditions that build a culture of belonging
Sage on the stage, slide-driven general sessions	Guide on the side, interactive keynotes and unscripted panels

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EXPERT TIP: Supercharge breakout experiences with gamification

Gamification works by simplifying complex problems and stimulating learning through gameplay. Tapping into our human nature to embrace competition and achievement, gamification teaches new behaviors and skills in an exciting way. When people genuinely engage, it supercharges the learning experience.

Gamified break-out sessions go beyond adding activities like quizzes or name tag swaps to a traditional workshop setting. An impactful gamified breakout is completely immersive, taking a next-generation approach to dynamic learning. Effective game-based tasks use a mix of media, from augmented reality (AR) to escape rooms to mobile apps. Games fuel our human instincts to socialize and collaborate. Immersive gaming creates a connection between people: sharing ideas, providing feedback and celebrating success.

DID YOU KNOW?

85%

of corporate employees are more engaged when gamification solutions are applied to their workplace.

—GARTNER



MEET THE EXPERT David Colgate

Innovation Director, London, England

David partners with his clients and teammates to co-create learning experiences that are real, human and entertaining. He focuses on creating solutions to transform how people feel about their work so that they can transform how their business performs.

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Think beyond registration data with event reporting

Registration numbers aren't results. They're one of many metrics. Post-event evaluations should measure success in two related areas.



How did your event satisfy audience expectations?



Did your event meet business goals?

Collecting and analyzing data on both individual impact and overall ROI gives the most complete picture.

Attendee surveys should answer the following:

1. Was the content relevant to your audience?
2. Was the content accessible and conveyed clearly?
3. Did attendees feel necessary content was missing?
4. Was on-site support accessible and helpful to attendees?
5. Given a list of products or services highlighted on site, can your attendees articulate the value each one brings to their organization? Which products or services need more clarity?

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Mountains of attendee information provide valuable feedback on event content, but it doesn't necessarily point to outcomes unless participation links to KPIs. Return to the event vision your team initially set. Reporting should tie back to the event purpose and intended audience outcomes to inform future planning.



WHERE DO YOU GET THE HARD NUMBERS TO MEASURE EVENT ROI?

Prove your event's value with these 8 overlooked metrics.



**EXPERT TIP:
Tell a strategic ROI story**

Evaluating and calculating event success should be as strategic as your plan. Reframe event ROI reporting by going beyond what's collected in event registration systems and RFIDs, online surveys and event apps. Leverage and cross reference performance data to demonstrate impact on the overall bottom line.

Measurement and ROI don't end when the event concludes. Event results take time. Include a plan for (continued) post-event measurement in your event strategy. If you only measure progress once, you're missing out on meaningful data. In addition to immediate impact, look at benchmarks further out, like six months and nine months post-event. Whatever intervals you choose, standardize them from event to event. This provides more accurate benchmarks for the future.

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EXPERT TIP: **Unlock real-time insights with trending tech**

Tying facial expressions into survey results takes the guesswork out of content engagement. New tools like Zenus.ai give sponsors and organizers real-time insights into attendee sentiment, traffic, dwell times, etc. Instant results help organizers pivot the event based on how attendees are responding and interacting, whereas post-event data could only inform future events.

Adding an AI-powered chatbot to your event website can help you provide better customer service from the get-go. Staying close to chatbot interaction helps your team adapt event content to resonate with attendees.



MEET THE EXPERT
Anna Boggs
Events Analytics Advisor, Minneapolis, Minnesota

Anna thrives on strategic problem-solving, like translating data findings into compelling insights. Her expertise in data transformation and storytelling, dashboard design, survey strategy, and programming positions her as a powerful collaborator.

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Creating a comprehensive event strategy is a shared effort. The experts featured here represent a fraction of the 100+ team members who contribute to our success from offices around the globe. Each brings individual strengths, but a shared mindset conveys consistency.



INNOVATION

We bring new ideas and approaches to our clients. We help challenge conventional thinking, explore options and spark solutions.



ADAPTABILITY

Events are a rapidly changing industry. We use foresight and flexibility to ensure projects remain relevant and competitive.



CONTINUOUS IMPROVEMENT

Teams seek feedback, iterate on ideas and strive for the best programs imaginable. We learn and grow with every event.



DIVERSITY OF THOUGHT

We don't shy away from deep discussions that create a more holistic understanding of each scenario's potential impacts. Diversity of thought helps us empathize with audiences and gives us a more comprehensive understanding of market and industry landscapes.



PROBLEM-SOLVING

Faced with challenges or obstacles, we embrace a fresh perspective. Alternative viewpoints inform strategic thinking and enhance the decision-making process.



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Confidently engage attendees

Evolve your event strategy to achieve your biggest goals

Contact us today to learn how.



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