

Event strategy

MASTERCLASS



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Stay Until The End & You'll Hear More About:



The key trait of successful event strategists



How strategists look at objectives



How things have changed today and what it means for you



What events work for what objective



9 frameworks to bring back to your office



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Who this event is NOT for:



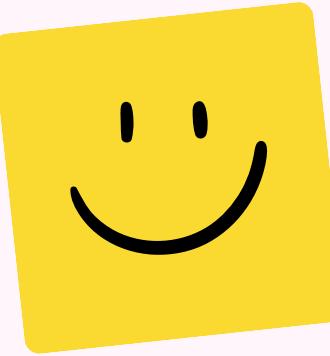
You want to stay in operations



You care mostly about logistics



You lean towards offline



**You're welcome to stick around, because
you'll still learn something valuable**

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Who should listen

-  **Event Owners** - Your event is the product
-  **Event Marketers** - You use events as a marketing tool
-  **Agency owners** - You support clients with events / experiential

I created this for:

Event professionals with
10+ years experience

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**If you've worked in events
but feel stuck in operations**



**If you still don't get a seat
at the decision making
table**



**If you know what works
but unable to articulate**

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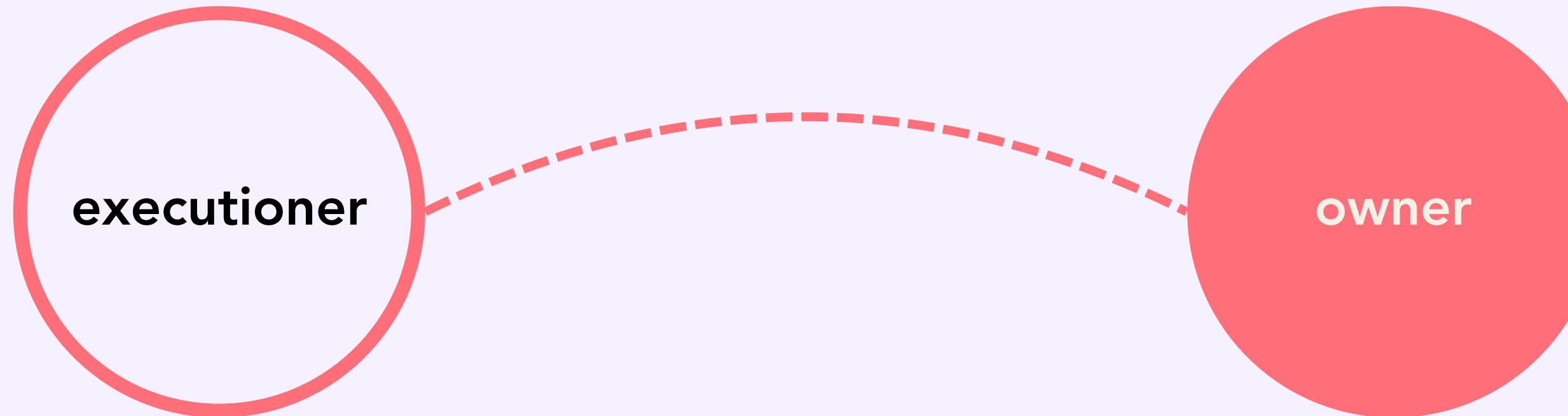


... but you're starting to feel
stuck and want to go **BIGGER**

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Career Upside



Commands higher salary

Can't be replaced with a cheaper option

Are you ready to start?

1
YES

2
**NOT
FOR
ME**

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About me

I have researched this topic for a few years

this is from
2019



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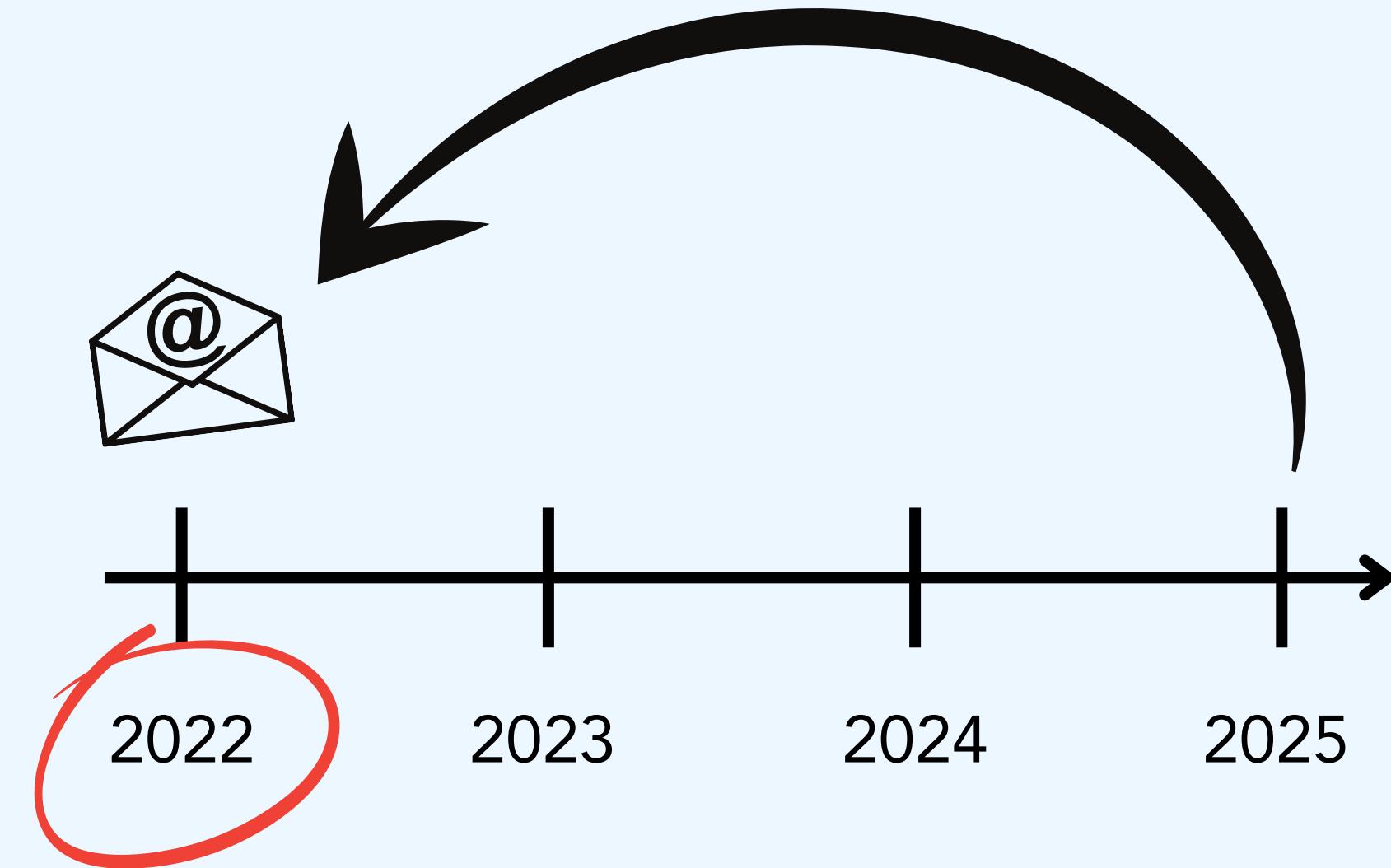


I've been a
speaker on
this topic for
15 years

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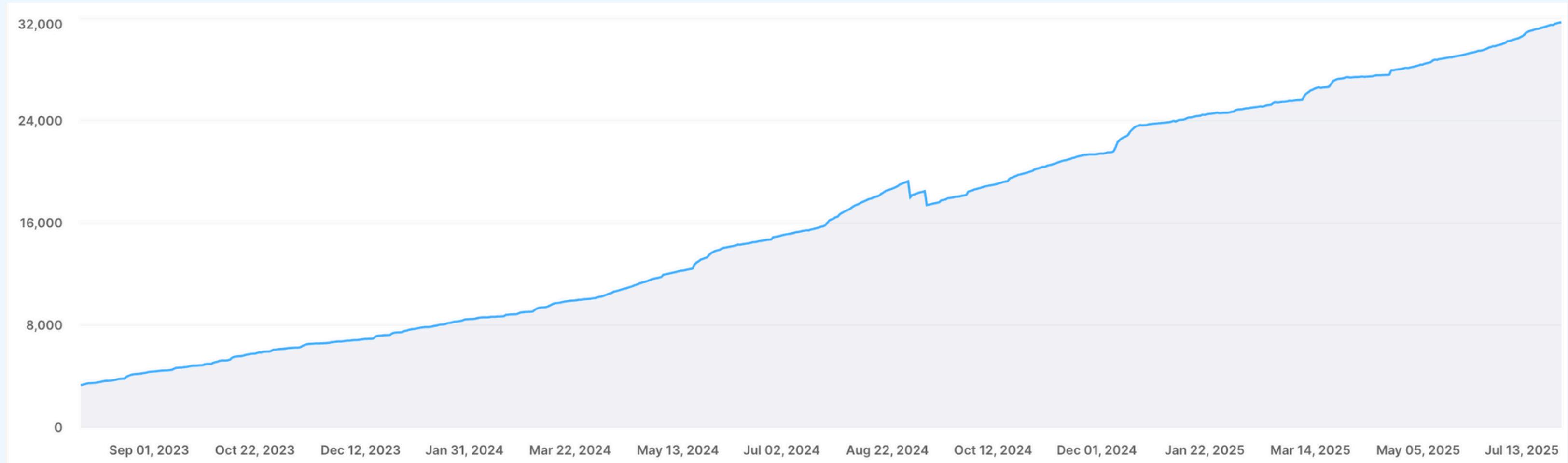
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I started
sharing my
newsletter
in 2022



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LIFETIME TOTALS

31,704
TOTAL SUBSCRIBERS

LAST 90 DAYS

54.41%
AVG OPEN RATE

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I also
started...



400 event
strategists joined



15 event strategists
meet every
month

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Last Year I also
won an award

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My breakthrough

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Clients



"If you are an ambitious event prof with a growth mindset, subscribe to the Boldpush newsletter and watch your thinking (and events strategy) transform."

Natasha Wood
Head of Strategy - FT Live



"Julius' depth of experience is unparalleled, with an exceptional ability to analyse situations, quickly understand challenges, and provide both immediate quick wins and practical strategies."

Sarah Fitzpatrick
Head of Partnerships
and Events - BSAVA

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And 15 eventtech companies



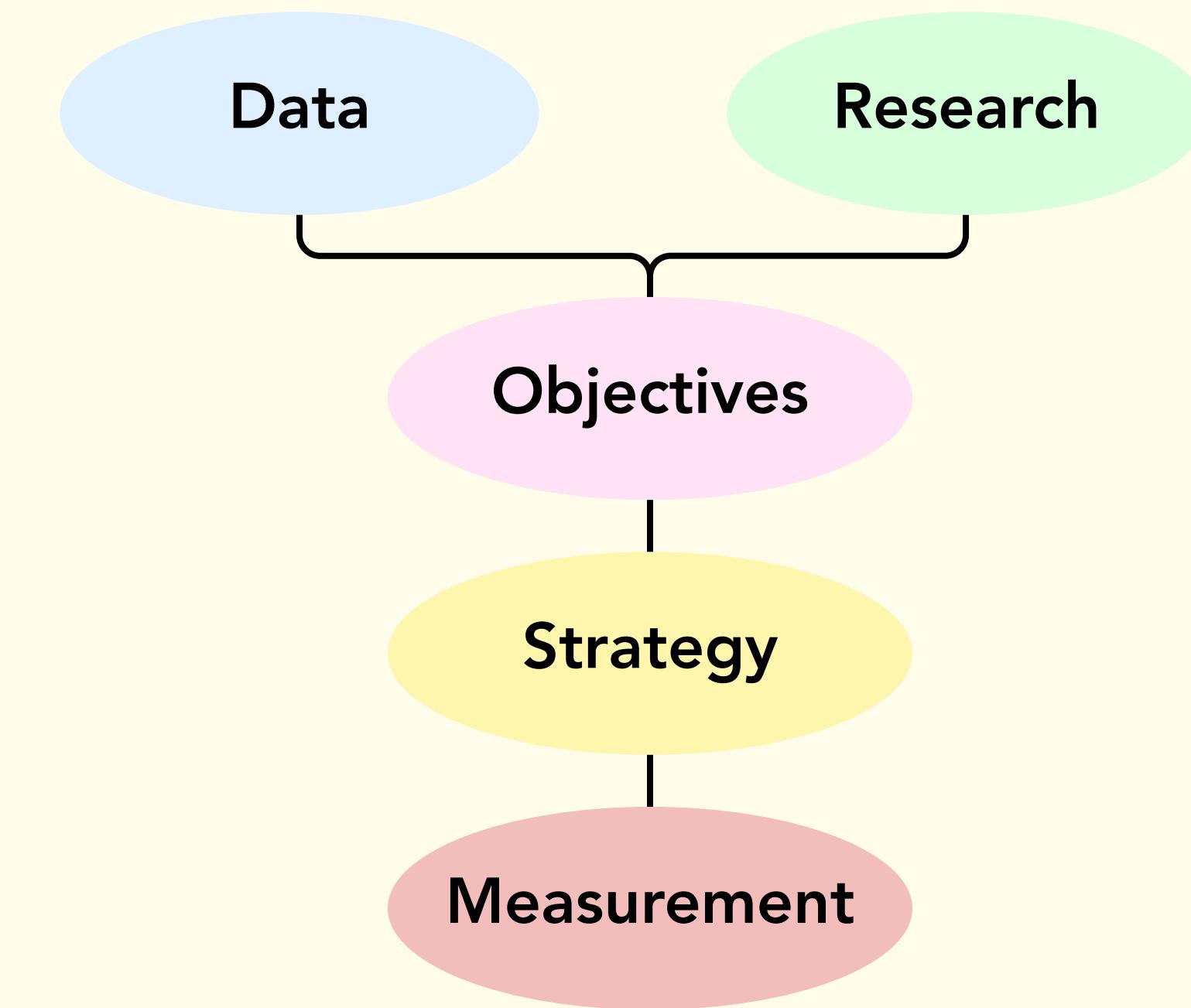
"Our industry demands deep knowledge and hands-on experience, and Boldpush delivers on both. Their fanatical attention to detail uncovered insights we couldn't find anywhere else, leading to recommendations with tangible pipeline and revenue impact."

Chris Sykes
CEO - Swoogo

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Here's My Simple Model You'll Learn Today...



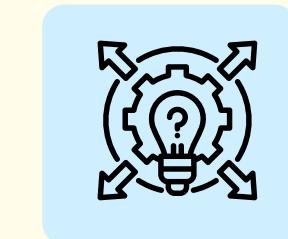
Why this matters now



AI push - replacing people



Budget pressures



High uncertainty

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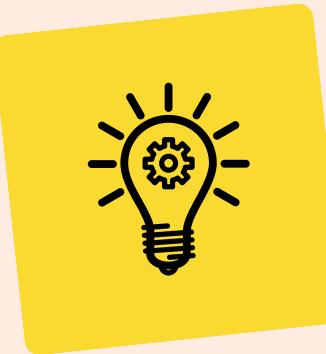
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What concerns you the most?

1
AI

2
Budget

3
Uncertainty



The background

What is an event strategist?

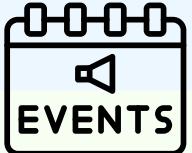
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Event Planner

vs

Event Strategist



Event Planner

Operational Excellence



Primary Focus

- Manages vendor relationships
- Creates and oversees event schedules
- Coordinates on-site logistics
- Ensures smooth execution of event elements



Key Responsibilities

- Exceptional organization
- Attention to detail
- Time management
- Problem-solving
- Vendor negotiation
- Multitasking
- Calm under pressure



Top Skills



Event Strategist

Overall event objectives and long-term impact

- Aligns events with broader business objectives
- Develops long-term event strategies
- Identifies opportunities for innovation and growth
- Analyzes industry trends to inform event direction

- Strategic thinking
- Data analysis
- Business planning
- Industry knowledge
- Leadership
- Innovation mindset
- Stakeholder management

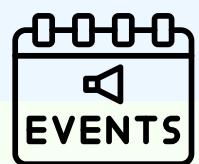
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Event Planner

vs

Event Strategist



Event Planner

- Booking venues and managing contracts
- Coordinating catering and audiovisual needs
- Creating detailed run-of-show documents
- Managing on-site staff and volunteers



Typical Tasks



Event Strategist

- Conducting stakeholder interviews to understand objectives
- Creating multi-year event roadmaps
- Recommending new event formats or technologies
- Presenting strategic plans to leadership



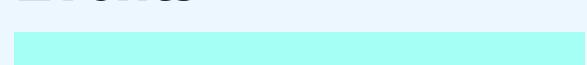
Impact on Event



Timeframe



Owned vs Third-Party Events



- Ensures smooth operation and attendee satisfaction

- Focused on current event execution

- Primarily focused on specific owned events

- Shapes the overall direction and long-term success of events

- Plans for long-term event strategy (1-5 years)

- Manages a diverse portfolio of owned events, occasionally evaluates external opportunities

...Let's Address the Events do not work, are expensive, or just parties

1

Given inflation, wars and uncertainty...

*"Is It Even Possible To Get
ROI with events?"*

2

'Events can't be measured'

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Setting the stage

There is no strategy
without data

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Setting the stage

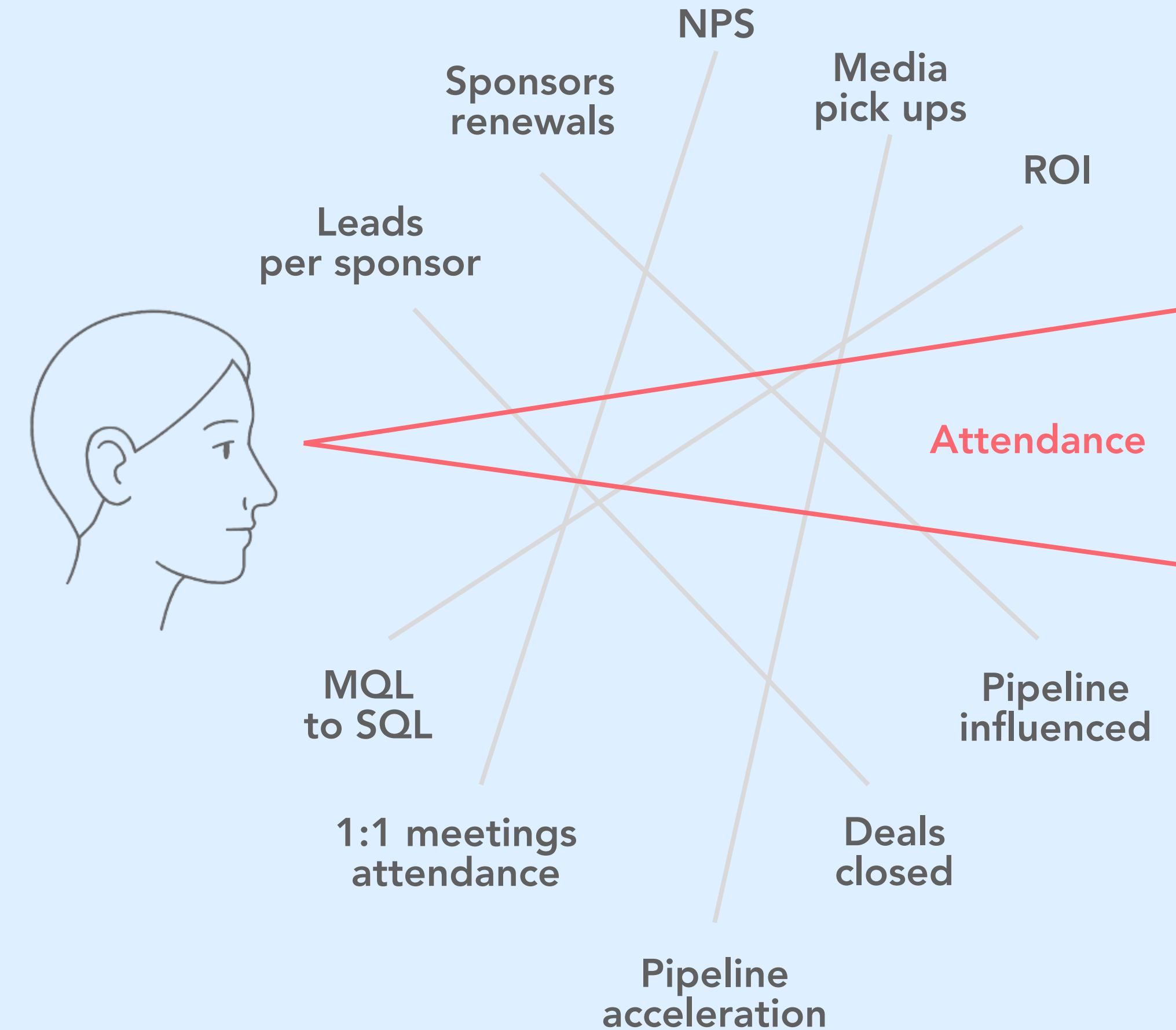


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Setting the stage

EVENT SUCCESS MYOPIA



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What's your
objective?

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Screw the SMART objectives

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Are you planning to bring in:

EVENT ROI

(Return on
Investment)



ROO

(Return on
Objectives)



ROE

(Return on
Emotions)



What It Is



ROI



ROO



ROE

ROI measures the financial gain (or loss) from an event relative to its costs.

ROO assesses how well your event meets predefined strategic goals (e.g., *brand awareness, lead generation*).

ROE evaluates the event's emotional impact, focusing on attendee sentiment, loyalty, and brand affinity.

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Adapting a portfolio vision

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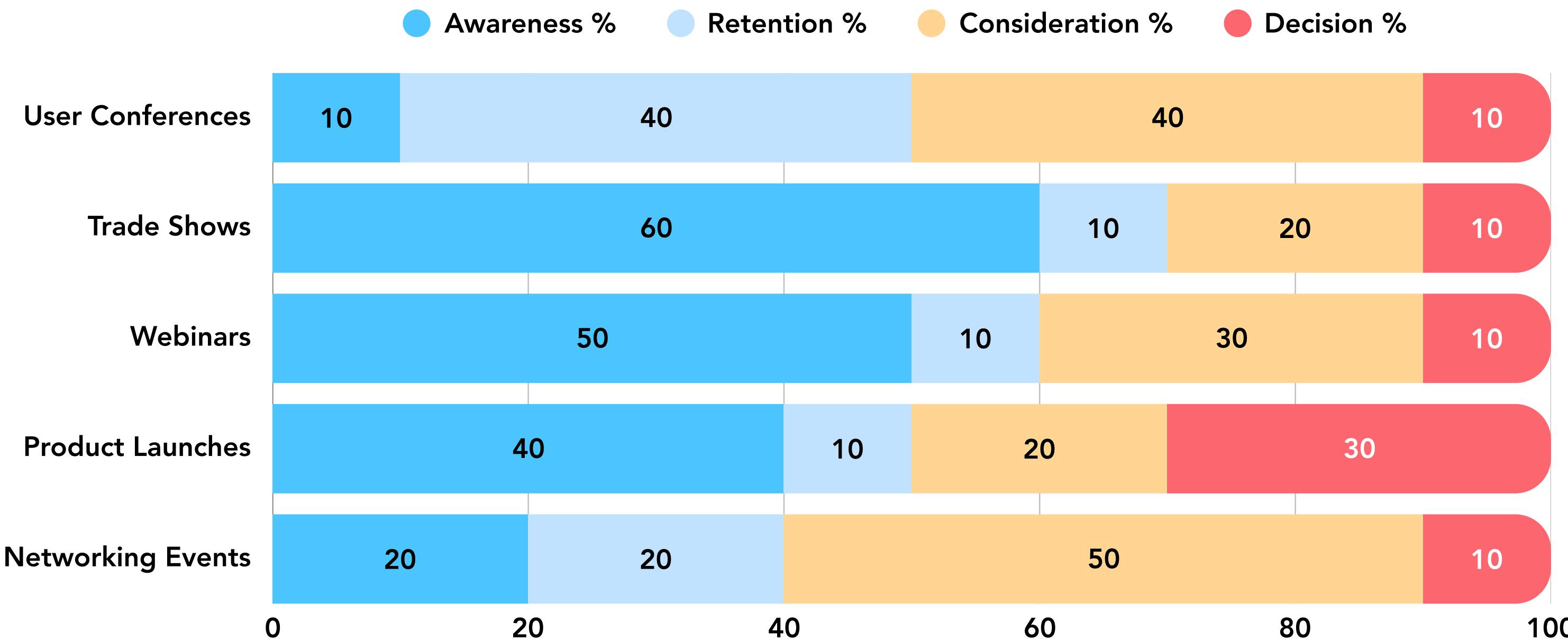
What events to choose

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The best event for your objective

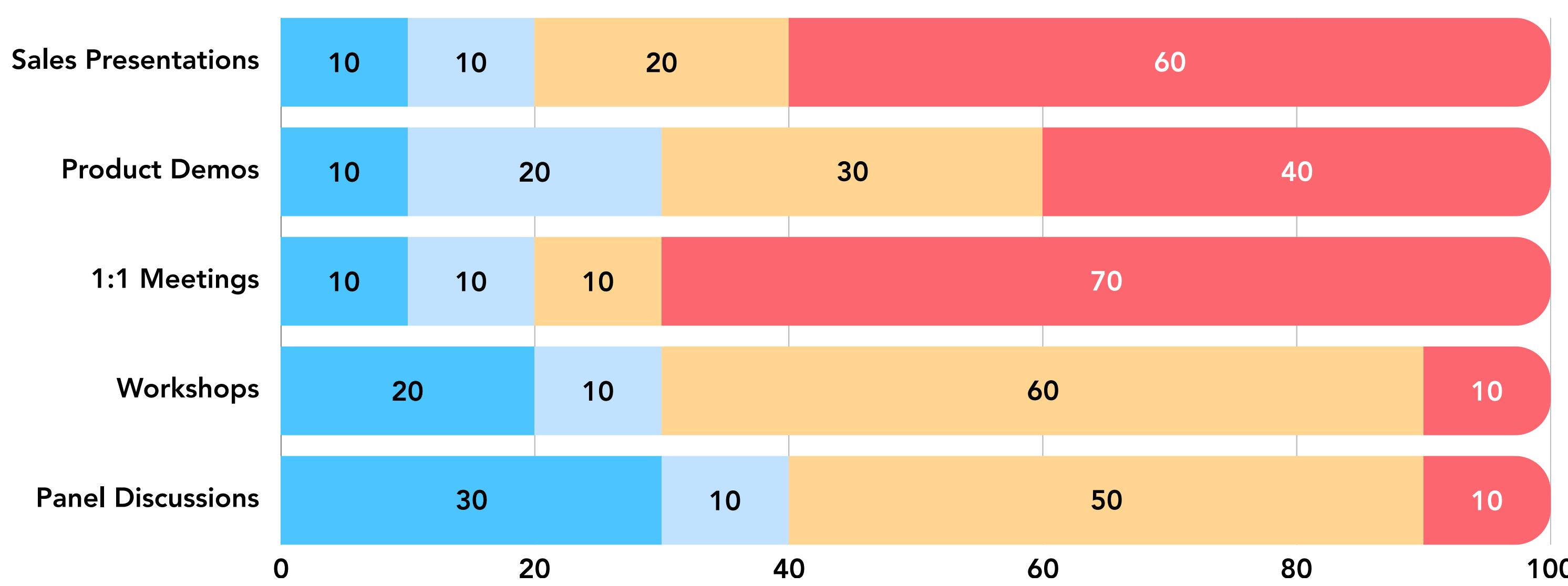


Source: Boldpush



The best event for your objective

● Awareness % ● Retention % ● Consideration % ● Decision %

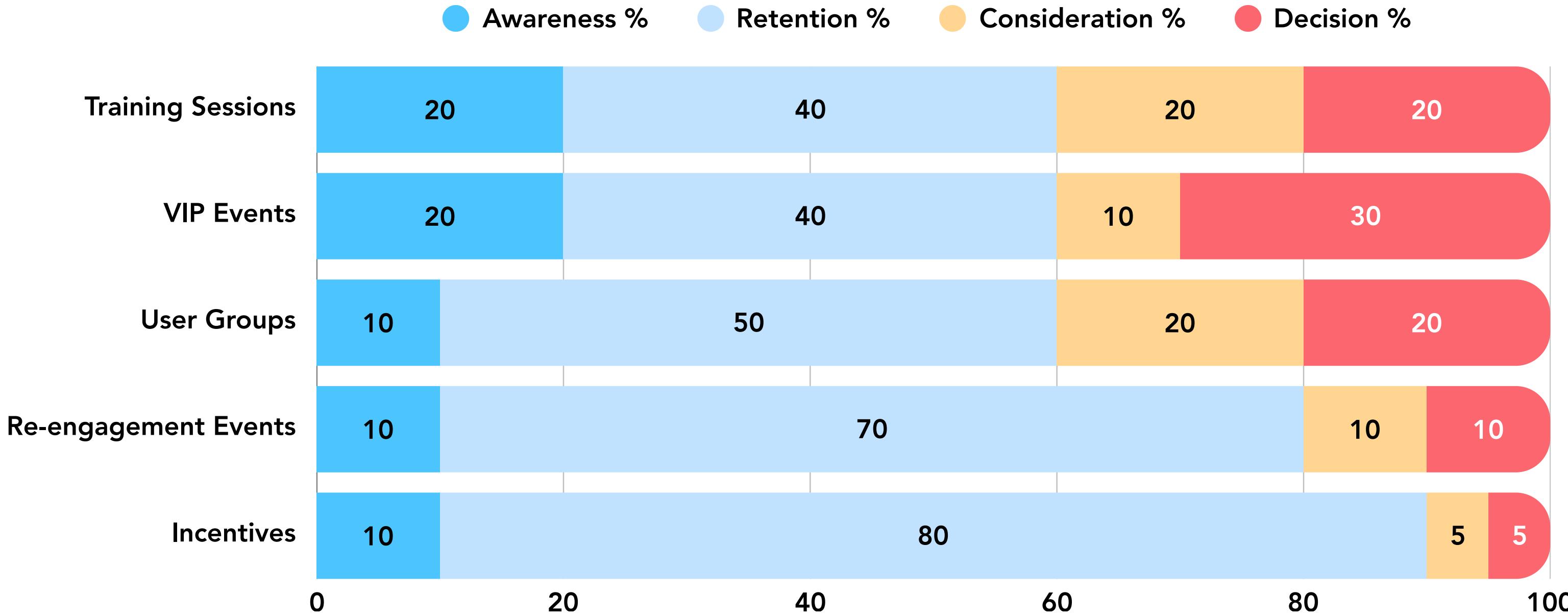


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The best event for your objective



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Assessing your event needs



OPTIMIZING EVENT PORTFOLIOS FOR ROI



**Stephenie
Lintl-McLean**

Founder of Beyond Branding Events

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Know the Context

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**What's changing
in 2025?**

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2025 EVENT STRATEGY ROADMAP

DESIGN



Connection Over Content

Design networking opportunities first; educational content becomes secondary



Moment Planning

Break event into individual **memorable touchpoints** rather than one big program



Experience-Driven Design

Create immersive, interactive environments that **go beyond** traditional presentations



Attention Span Focus

Build shorter, varied sessions with breaks to maintain engagement. **Group them in microevents.**



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2025 EVENT STRATEGY ROADMAP

ENGAGEMENT



Structured Networking

Prefer **connection over content** with accurate matchmaking



Interactive Formats

Replace frontal lectures with **workshops, panel battles, live podcasts, hands-on activities**



Community Building

Create **micro-events** and **sub-groups** to help attendees find their tribe



White Space

Intentionally **design breaks** and **downtime** for informal connections and processing



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2025 EVENT STRATEGY ROADMAP

SECURE YOUR REVENUE



Multi-Year Deals

Lock in **long-term commitments** from sponsors for predictable revenue

Strategic Sponsorship

Prefer **hosted buyer meetings** to just awareness

2nd-Tier Destinations

Reduce cost by picking **connected second-tier destinations**

Understand Late Registration Patterns

Beef up **early birds**, use **price increase schedules**, choose destinations with **low late registration patterns**.

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Cost

**DO YOU PROJECT
YOUR 2025 COST
TO BE**

● 81.3% (+2.8%)

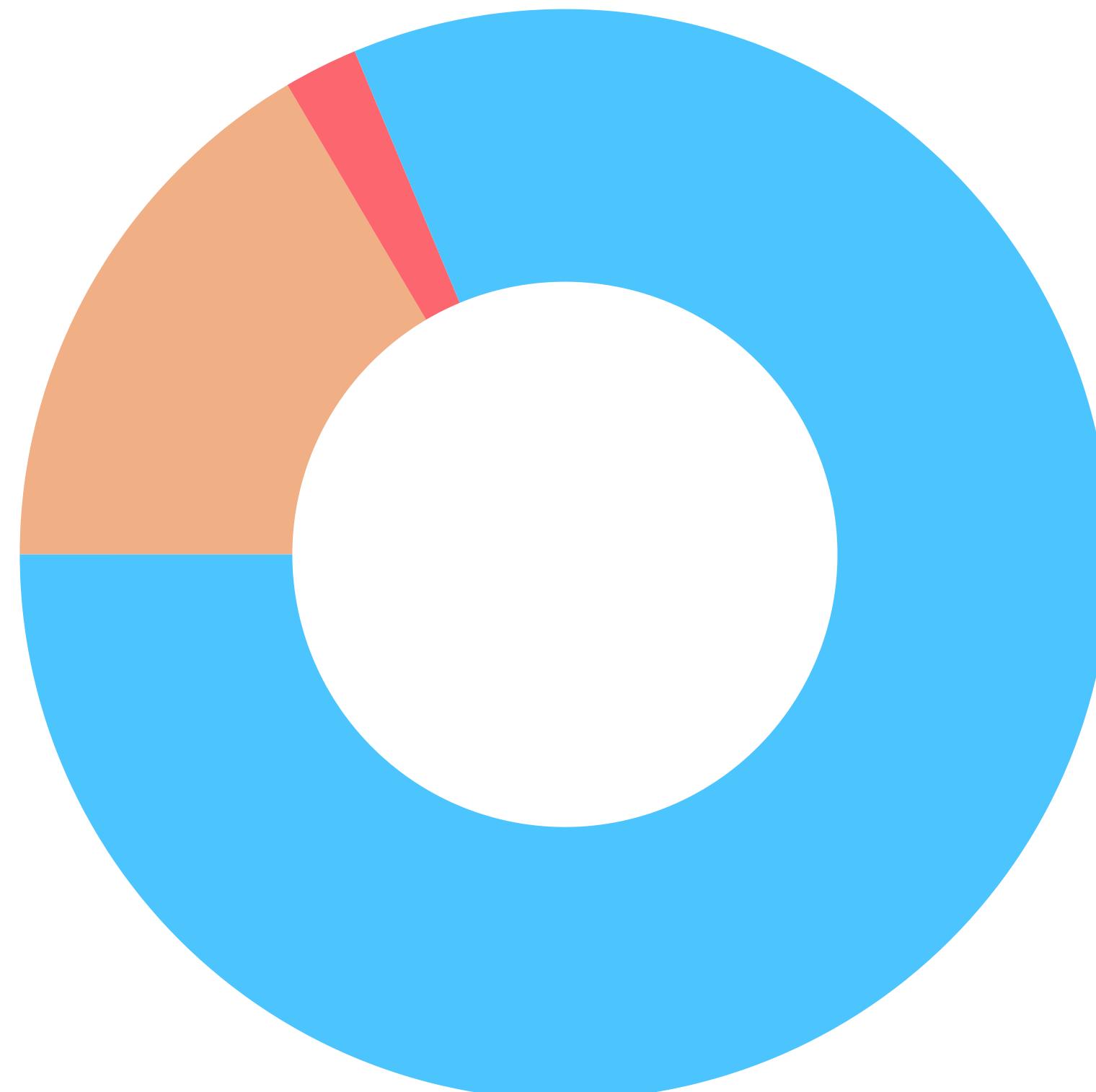
UP

● 16.5% (-3%)

ABOUT THE SAME

● 2.2% (+0.2%)

DOWN



The **Budget** **\$aving** event



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LAST MINUTE EVERYTHING

ARE ATTENDEES FOR YOUR MAIN EVENT

- 52.6% (+4.8%)
REGISTERING LATE
- 28.3% (-4.4%)
REGISTERING AT
THE SAME TIME
- 12.9% (+0.2%)
REGISTERING THE WEEK
BEFORE THE EVENT
- 6.3% (-0.5%)
REGISTERING EARLY



CHECK OUT

**ACCELERATING
EVENT
REGISTRATIONS**

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LAST MINUTE SPONSORSHIPS

ARE SPONSORS FOR YOUR MAIN EVENT

● 40.8% (+3.2%)

SIGNING UP IN THE
USUAL TIMEFRAME

● 33.1% (+0.9%)

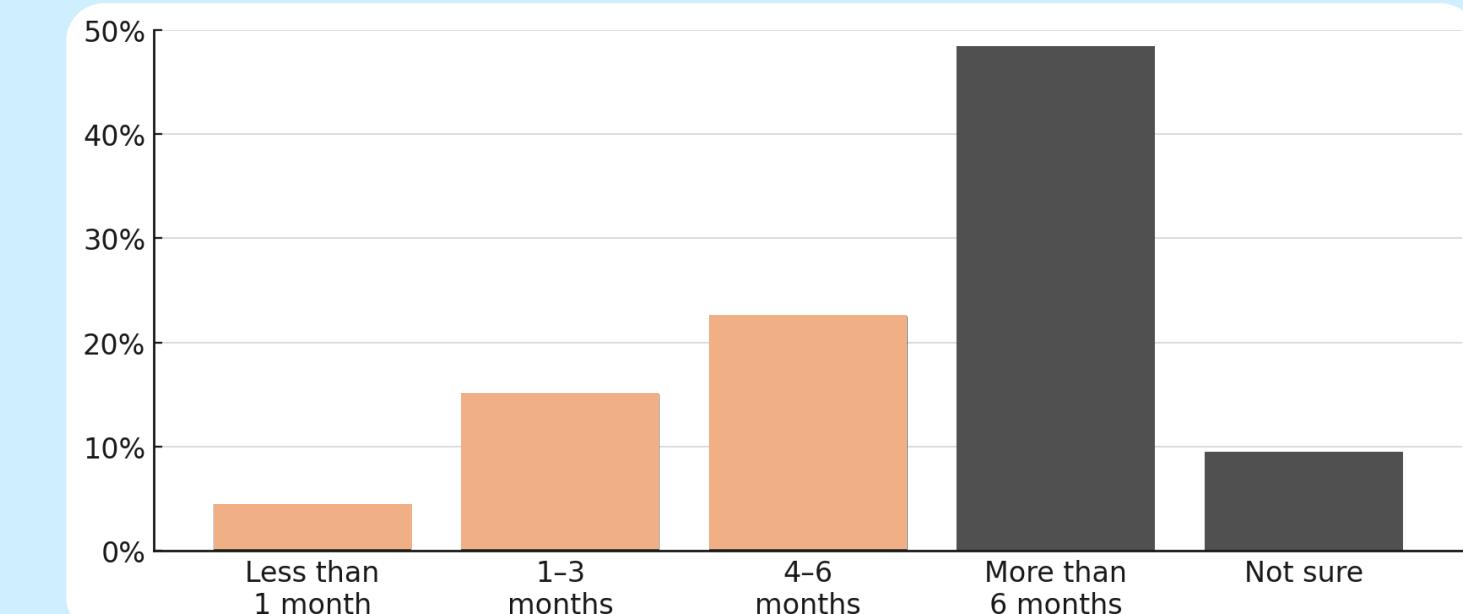
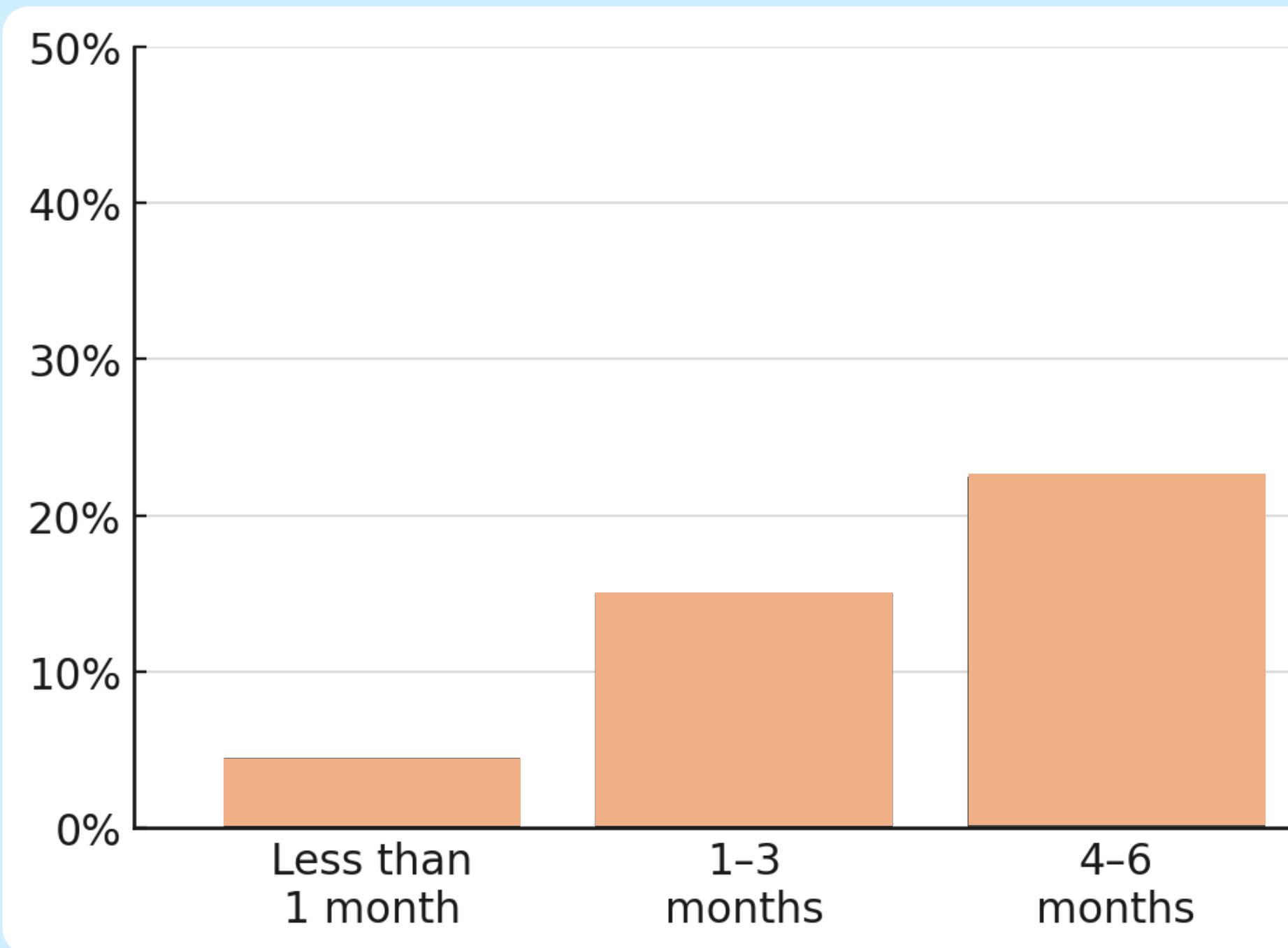
SIGNING UP LATE

● 26.1% (-4.1%)

WE HAVE NO SPONSORS



What is your typical venue booking timeline (lead time before the event)?



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**Business events
are about
business**

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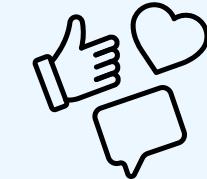
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Event ROI Checklist

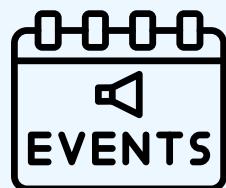
Strategy



Set specific, measurable goals for both short-term (e.g., *number of qualified leads, on-site sales*) and long-term outcomes (e.g., *lead conversion rate, customer lifetime value*).



Leverage social media to identify key prospects attending the event.



Diversify event types (trade shows, conferences, workshops, webinars)



Develop a tiered prospect list based on potential value, prioritizing outreach and booth engagement strategies.

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Event ROI Checklist

What to track

Immediate ROI Contribution:

Measure short-term, direct event impact



Long-term ROI Contribution:

Track extended value over time



Key metrics:

- Pipeline Generated
- SQL Sales Qualified Leads
- MQL Marketing Qualified leads
- Immediate, post-event demo/calls bookings
- Cost Per Lead (CPL)

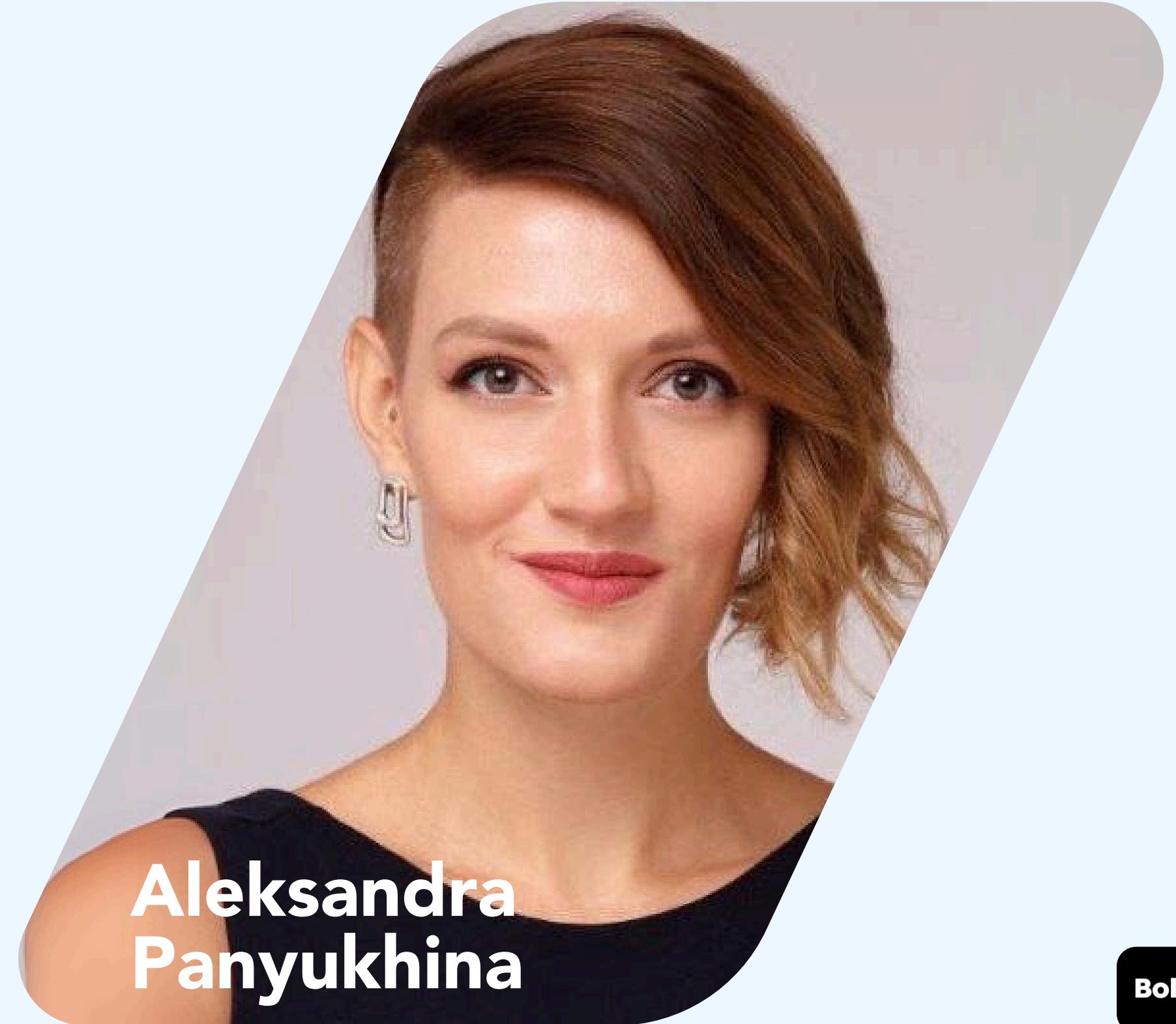
Key metrics:

- Pipeline Acceleration/Velocity
- Customer Lifetime Value
- Win Rate (Attendee vs non attendee)
- Average Customer Value (Attendee vs non attendee)
- Lead-to-Customer Conversion Time

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BUILDING AN EVENT ROI FRAMEWORK



Aleksandra
Panyukhina

Experience Marketing Director at Pixelz

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Measurement

Event Measurement Cheat Sheet

STRATEGY

EVENT TECH

DESIGN

VENUE & DESTINATION

MARKETING

ANALYSIS

1 Ob Objectives	13 Np Networking Platform	20 Sf Session Formats	27 Sd Stage Design	34 Ss Site Selection	41 Vm Vendor Management	47 Cp Content Planning	53 Ec Email Campaigns
2 Bm Business Model	7 RA Risk Assessment	14 Vp Virtual Platform	21 Ri Room Layouts	28 Ld Lighting Design	35 Av AV Requirements	42 Er Equipment Rental	54 Ts Ticketing Strategy
3 Rs Revenue Strategy	8 Mp Market Position	15 Lr Lead Retrieval	22 Mp Moment Planning	29 Ef Experience Flow	36 Rb Room Blocking	43 Ep Emergency Planning	49 Eb Early Bird Strategy
4 Tm Timeline	9 Bs Brand Strategy	16 Os Onsite Services	23 Cm Connection Mapping	30 Sp Signage Planning	37 Tr Transportation	44 Ac Accessibility	50 Sp Sponsorship Packages
5 Sh Stakeholder	10 Ps Platform Selection	17 Di Data Integration	24 En Entertainment	31 Tf Traffic Flow	38 Sc Security	45 Wp Weather Planning	51 Cb Community Building
6 Ca Competitive Analysis	11 Rs Registration Platform	18 Ls Live Streaming	25 Ac Activations	32 Ie Interactive Elements	39 St Staffing	46 In Insurance	52 Rd Registration Drive
7 Sp Strategic Partners	12 Ma Mobile App	19 Ar Audience Response	26 Fb F&B Planning	33 Ds Destination Selection	40 Su Sustainability		58 Pm Partner Marketing
	60 Am Attendance Metrics	61 Ra ROI Analysis	62 Fs Feedback Surveys	63 Da Data Analytics	64 Sm Satisfaction Metrics	65 Ls Lead Scoring	66 Rt Revenue Tracking
	67 Em Engagement Metrics	68 Cr Conversion Rates	69 Ca Cost Analysis	70 Ba Behavioral Analysis	71 Ta Trend Analysis		

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9 frameworks

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What I have for you

9 Frameworks **FREE**

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Event Planner

VS

Event Strategist

VS

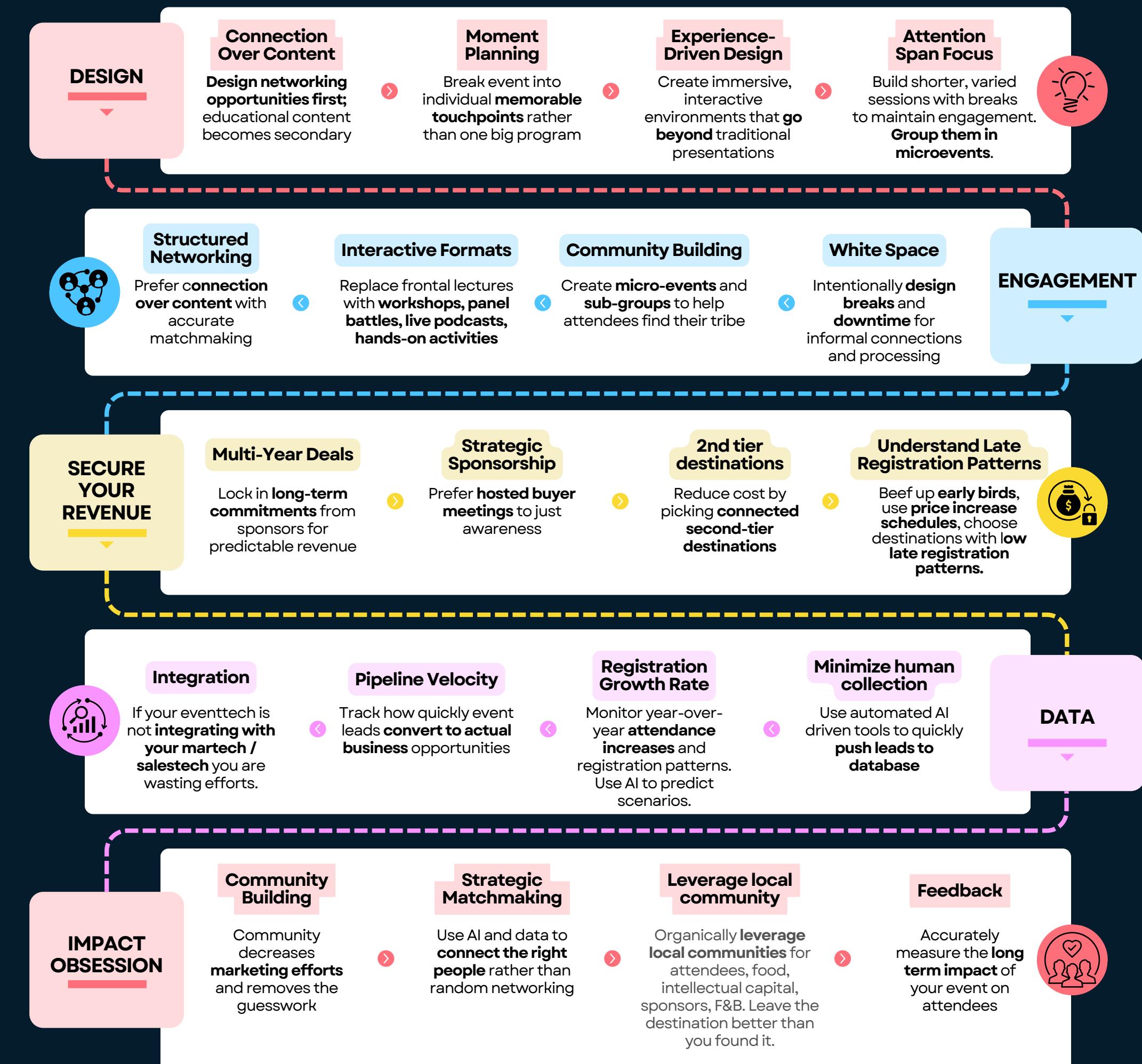
Event Marketer

		Event planner	Event Strategist	Event Marketer
 Primary Focus		Operational Excellence	Overall event objectives and long-term impact	Leveraging events to generate leads, build brand awareness, and drive revenue for the company
 Key Responsibilities		<ul style="list-style-type: none">- Manages vendor relationships- Creates and oversees event schedules- Coordinates on-site logistics- Ensures smooth execution of event elements	<ul style="list-style-type: none">- Aligns events with broader business objectives- Develops long-term event strategies- Identifies opportunities for innovation and growth- Analyzes industry trends to inform event direction	<ul style="list-style-type: none">- Develops event marketing strategies aligned with business objectives- Manages company's presence at industry events and trade shows- Creates and executes company-owned events- Enables Sales Teams- Measures and reports on event ROI
 Top Skills		<ul style="list-style-type: none">- Exceptional organization- Attention to detail- Time management- Problem-solving- Vendor negotiation- Multitasking- Calm under pressure	<ul style="list-style-type: none">- Strategic thinking- Data analysis- Business planning- Industry knowledge- Leadership- Innovation mindset- Stakeholder management	<ul style="list-style-type: none">- Strategic event planning- Lead generation and nurturing- Sales and marketing alignment- Budget management and ROI analysis- Industry and competitor analysis- Data analysis and reporting
 Typical Tasks		<ul style="list-style-type: none">- Booking venues and managing contracts- Coordinating catering and audiovisual needs- Creating detailed run-of-show documents- Managing on-site staff and volunteers	<ul style="list-style-type: none">- Conducting stakeholder interviews to understand objectives- Creating multi-year event roadmaps- Recommending new event formats or technologies- Presenting strategic plans to leadership	<ul style="list-style-type: none">- Selecting relevant industry events for participation- Planning booth strategies and company-sponsored seminars- Managing event budgets and vendor relationships- Briefing sales teams for event participation
 Impact on Event		Ensures smooth operation and attendee satisfaction	Shapes the overall direction and long-term success of events	Maximizes company's return on event investments by driving engagements and generating leads
 Timeframe		Focused on current event execution	Plans for long-term event strategy (1-5 years)	Manages mix of third-party industry events and creation of owned experiences
 Owned vs Third-Party Events		Primarily focused on specific owned events	Manages a diverse portfolio of owned events, occasionally evaluates external opportunities	Often manages presence at third-party shows, balancing with owned event strategies

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2025 EVENT STRATEGY ROADMAP



EVENT ROI

(Return on Investment)

VS

ROO

(Return on Objectives)

VS

ROE

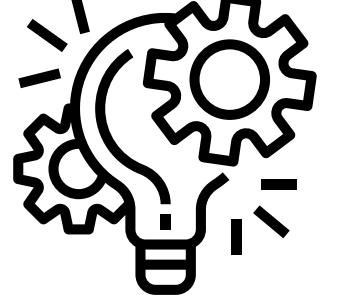
(Return on Emotions)

	 ROI	 ROO	 ROE
 What It Is	ROI measures the financial gain (or loss) from an event relative to its costs.	ROO assesses how well your event meets predefined strategic goals (e.g., brand awareness, lead generation).	ROE evaluates the event's emotional impact, focusing on attendee sentiment, loyalty, and brand affinity.
 Why It Matters	Demonstrates direct monetary value ; justifies budgets and profitability.	Shows if you achieve objectives beyond finances (e.g., leads, awareness, engagement).	Captures intangible benefits like attendee delight and loyalty; differentiates events via memorable experiences.
 Examples	Revenue from ticket sales or sponsorships vs. costs; post-event sales uplift.	Number of qualified leads vs. target; social media mentions or press coverage vs. benchmarks.	Post-event surveys on attendee sentiment; monitoring NPS or social listening for emotional engagement.
 Formula / Measurement	$ROI = (\text{Net Profit} / \text{Total Investment}) \times 100$	No single formula ; example: $ROO = (\text{Actual Outcome} / \text{Target Outcome}) \times 100\%$	Often qualitative ; can use NPS or sentiment scores, e.g. $ROE = \text{Positive Emotional Responses} / \text{Total Responses}$.
 Type of Events	Often best for revenue-driven events (e.g., trade shows, conferences).	Ideal for internal, strategic, or brand-building events (e.g., product launches, all hands, SKOs).	High-impact experiences focused on emotional engagement (e.g., brand experiences, consumer activations).
 KPIs	Profit margin, revenue growth , cost per lead, sponsorship revenue.	Leads generated, brand mentions, website traffic or conversions from event, brand recall surveys .	Attendee satisfaction scores, Net Promoter Score (NPS), sentiment analysis , emotional resonance or affinity .
 When to Use It	Justifying budgets to stakeholders; comparing event profitability.	When key objectives extend beyond profit (e.g., product launch success, brand building).	When focusing on how attendees feel , long-term brand affinity, and overall emotional resonance.
 PROs	Simple, widely understood ; easy to compare across projects.	Ties event activities to broader strategic targets; measures success beyond profit alone.	Tracks memorable experiences that build brand advocacy; highlights emotional factors in a crowded market.
 CONs	Ignores intangible benefits or future returns; near-term focus can be misleading.	Requires clearly defined objectives ; more complex if goals are subjective.	Emotional impact is subjective ; hard to link directly to immediate revenue or cost savings.
	Include all costs for accurate ROI; note timing of revenue (pre- vs. post-event).	Objectives should be business tied and in line with wider company objectives.	Use consistent methods (surveys, polls, sentiment analysis); combine with ROI and ROO for business buy in.

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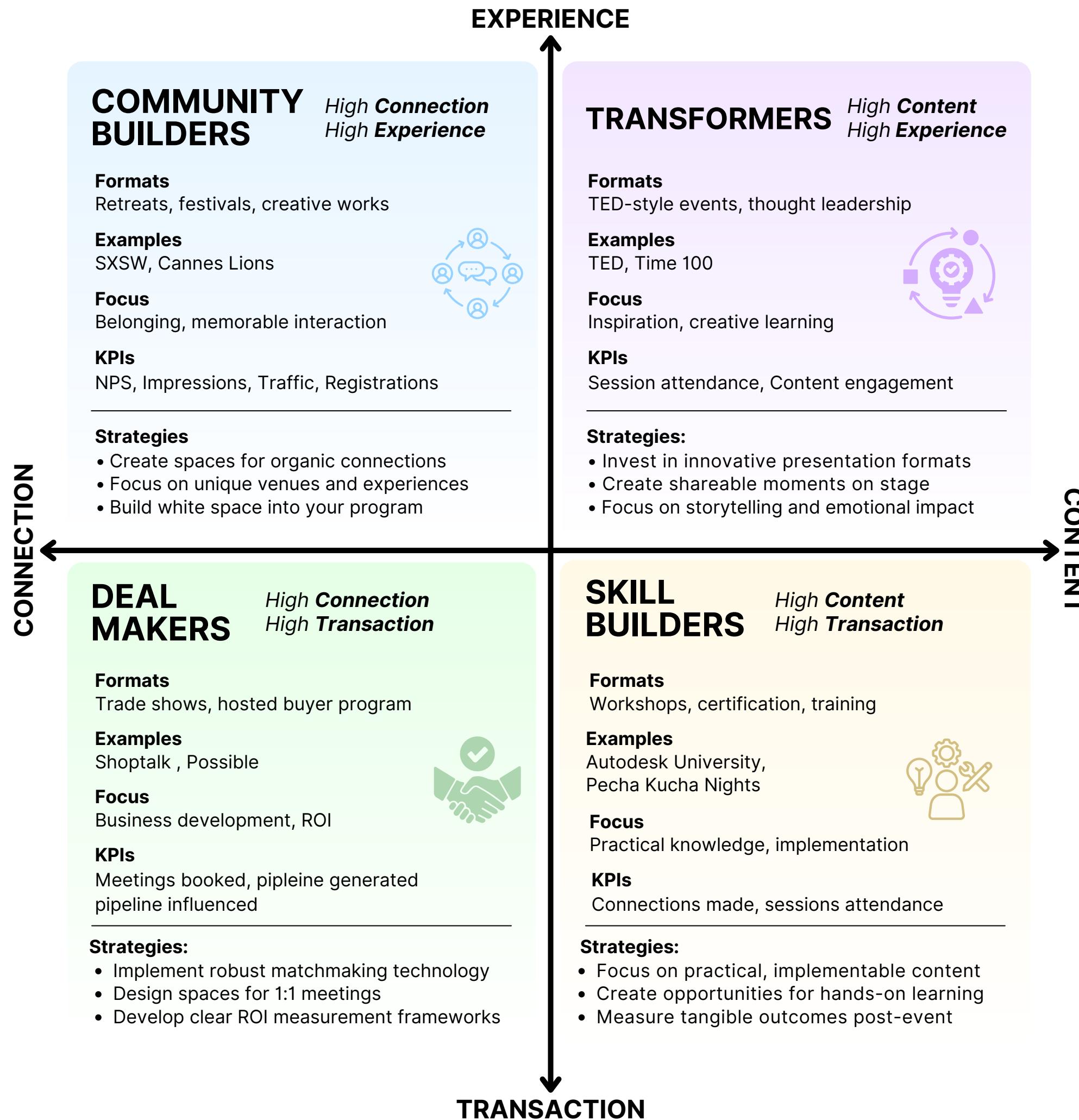
Event ROI Checklist

Strategy			
	Set specific, measurable goals for both short-term (e.g., number of qualified leads, on-site sales) and long-term outcomes (e.g., lead conversion rate, customer lifetime value).		Leverage social media to identify key prospects attending the event.
	Diversify event types (trade shows, conferences, workshops, webinars)		Develop a tiered prospect list based on potential value, prioritizing outreach and booth engagement strategies.
Set up			
<ul style="list-style-type: none"> - Set up criteria to score leads based on data - Lead retrieval integration or quick push to CRM - Record meetings and push notes to the CRM - Take manual notes and push immediately to CRM 		<ul style="list-style-type: none"> - Use QR codes or RFID badges to capture interactions - Deploy cameras to track traffic and sentiment - Set up customer success platforms to measure long term impact - Leverage AI to get additional insights 	
What to track			
Immediate ROI Contribution: Measure short-term, direct event impact	Key metrics: <ul style="list-style-type: none"> - Pipeline Generated - SQL Sales Qualified Leads - MQL Marketing Qualified leads - Immediate, post-event demo/calls bookings - Cost Per Lead (CPL) 	Long-term ROI Contribution: Track extended value over time	Key metrics: <ul style="list-style-type: none"> - Pipeline Acceleration/Velocity - Customer Lifetime Value - Win Rate (Attendee vs non attendee) - Average Customer Value (Attendee vs non attendee) - Lead-to-Customer Conversion Time
Decide how to show up			
Experiential Activation Go big with a large activation, preferably at Tier 1 shows. Prioritize brand and immersive experiences.	Multiple Spaces/Activation Combine the main booth with extra space or OOH. Either outside of the show or within the show floor.	Smaller Presentation with Mixed Speakers A more focused stage with a mix of company and non-company speakers. A mix of product and non-product content.	Small Meeting Rooms Create a space for intimate client and non-client meetings
Large Presentation Stage with an External Speaker Make your booth a content-driven stage with non-company speakers	Customer Testimonial Station Host your top customers to be at the booth with you or attend meetings. Collect videos and show them at the demo.	Exclusive VIP Event Invite your top clients for dinner at a restaurant on-site.	Client Only Offsite Plan an external activity (golf, food tour, yoga) with your top clients.
One-to-one Consultations Step up the demo with direct consultations on prospective client's issues.	Client Only Lounge Host a client-only lounge at the booth or hospitality space within the venue.	Product Live Q&A Use content sessions to support existing customers with new features and FAQs.	
Account Manager Station Bring customer service and account managers to the show to support existing customers.	Product Demo Classic demo station with consultant and critical product features according to use case.	Live Podcast Host clients and case studies in an intimate podcast environment. Showcase success stories.	
Social Media Driven Create a social media worthy selfie station or social-driven activation.		Product Launch Announce your next product at the booth or on stage.	
Support your Sales team			
Share a Strategy: Data-backed outreach prioritizes potential attendees	Provide Custom Offers: Offer them deals boost sales conversions	Give Feedback: Share converting strategies, encourage replication	Clarify Benefits: What's in it for them to motivate your sales team
Provide Scripts: Tailored pitches for different personas	Provide Email Copy: Share ready-made content to engage prospects	Offer Rewards: Incentivize performance with tangible perks	Set Reminders: To follow up at appropriate intervals

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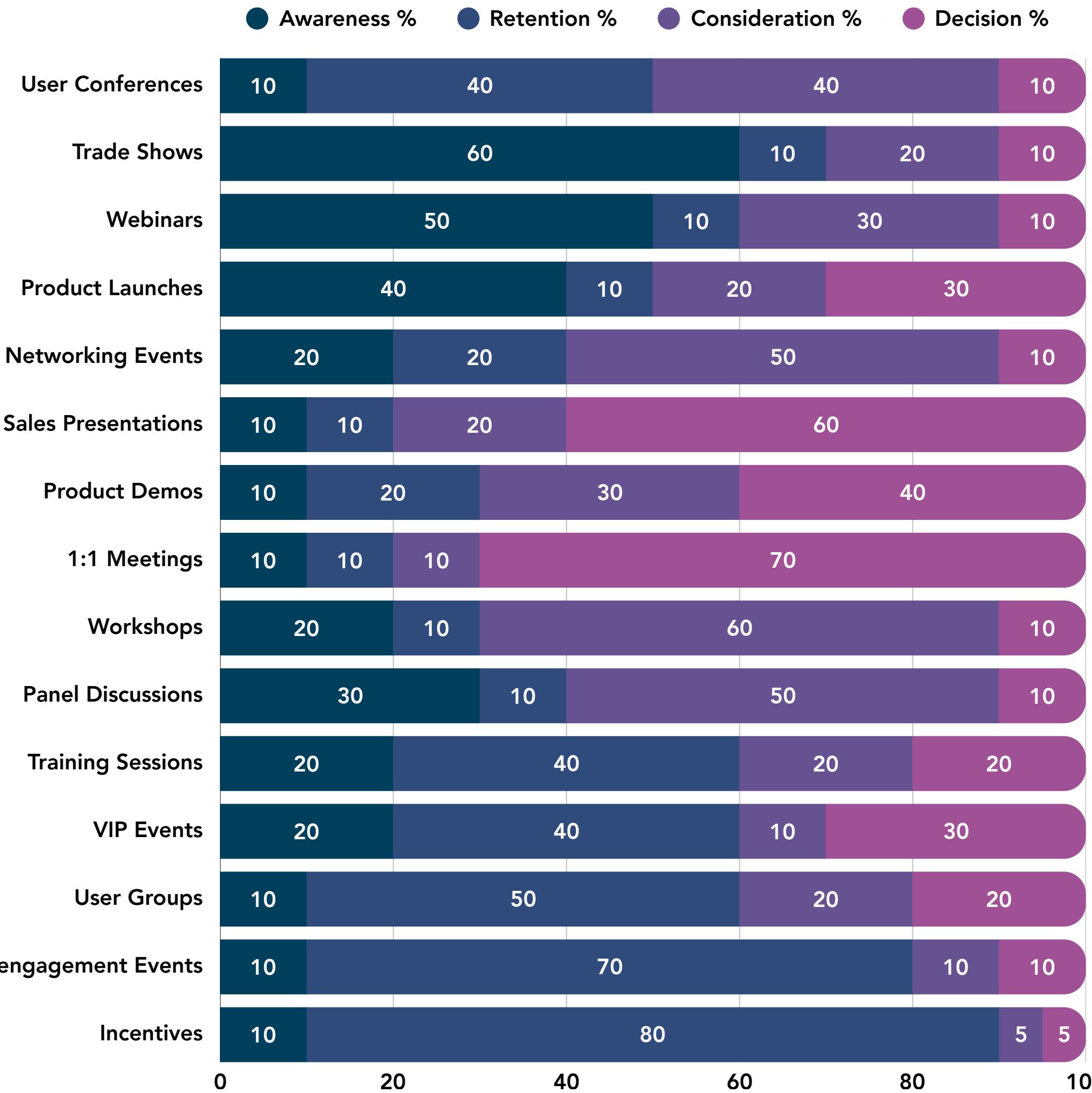
EVENT POSITIONING QUADRANT



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THE BEST EVENT FOR YOUR OBJECTIVE



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Event Measurement Cheat Sheet

Event Marketing	Content and Business	Arrival & Onboarding
<ul style="list-style-type: none"><input type="checkbox"/> Social Media<ul style="list-style-type: none">↗ Metrics: Reach, engagement rate, conversion rate⚙ Tools: Social media analytics tools (e.g., Facebook Insights, Twitter Analytics)<input type="checkbox"/> Email Marketing<ul style="list-style-type: none">↗ Metrics: Open rates, click-through rates, conversion rates⚙ Tools: Email marketing software (e.g., Mailchimp, HubSpot)<input type="checkbox"/> Website<ul style="list-style-type: none">↗ Metrics: Page views, bounce rates, time on page, conversion rates⚙ Tools: Web analytics tools (e.g., Google Analytics)<input type="checkbox"/> Peer Sharing<ul style="list-style-type: none">↗ Metrics: Share count, referral traffic, attendee conversion⚙ Tools: Social sharing analytics (InGO, GleanIn, Snöball, Invitario)<input type="checkbox"/> Pre-Event Webinar<ul style="list-style-type: none">↗ Metrics: Registration count, attendance rate, engagement rate, post-webinar survey results⚙ Tools: Webinar platforms and landing pages<input type="checkbox"/> Early Birds and VIP Packages<ul style="list-style-type: none">↗ Metrics: Sales volume, conversion rate, revenue⚙ Tools: CRM and sales tracking tools (e.g., Salesforce, HubSpot)<input type="checkbox"/> Registration Form<ul style="list-style-type: none">↗ Metrics: Form completion rate, drop-off rate⚙ Tools: CRM and sales tracking tools (e.g., Salesforce, HubSpot)<input type="checkbox"/> Confirmation Email and KBYG<ul style="list-style-type: none">↗ Metrics: Open rates, click-through rates⚙ Tools: Email marketing software	<ul style="list-style-type: none"><input type="checkbox"/> Keynote Speakers, Panel Discussions, Breakout Sessions<ul style="list-style-type: none">↗ Metrics: Attendance, Scans In/Out, facial analysis, feedback⚙ Tools: Event app, survey tools<input type="checkbox"/> Exhibit Hall<ul style="list-style-type: none">↗ Metrics: Booth visits, traffic, impressions⚙ Tools: Event app, survey tools	<ul style="list-style-type: none"><input type="checkbox"/> Hotel Room<ul style="list-style-type: none">↗ Metrics: Room bookings, attendee feedback⚙ Tools: Hotel management systems, survey tools<input type="checkbox"/> Welcome Desk<ul style="list-style-type: none">↗ Metrics: Check-in time, attendee satisfaction⚙ Tools: Check-in software, survey tools
	<h3>Networking</h3> <ul style="list-style-type: none"><input type="checkbox"/> Meetings<ul style="list-style-type: none">↗ Metrics: Meetings booked, profile saves, matches made⚙ Tools: Event app, survey tools<input type="checkbox"/> Attendee App<ul style="list-style-type: none">↗ Metrics: App downloads, active users, engagement rate⚙ Tools: Event app analytics	<h3>Post Event Content</h3> <ul style="list-style-type: none"><input type="checkbox"/> Event Recordings<ul style="list-style-type: none">↗ Metrics: Views, engagement rate, feedback⚙ Tools: Web analytics tools, video analytics<input type="checkbox"/> Community<ul style="list-style-type: none">↗ Metrics: Membership growth, engagement rate, activity level⚙ Tools: Community platforms (e.g., Slack, Discord)
		<h3>Evaluation</h3> <ul style="list-style-type: none"><input type="checkbox"/> Post-event Survey<ul style="list-style-type: none">↗ Metrics: Response rate, satisfaction scores, qualitative feedback⚙ Tools: Survey tools, app, or reg tool.<input type="checkbox"/> Event Recap<ul style="list-style-type: none">↗ Metrics: Views, engagement rate, feedback⚙ Tools: Web analytics tools, social media analytics<input type="checkbox"/> Event Photos & Videos<ul style="list-style-type: none">↗ Metrics: Views, engagement rate, shares⚙ Tools: Web analytics tools, social media analytics

30 EVENT KPIS CHEAT SHEET

	REGISTRATION GROWTH RATE	COST PER ACQUISITION	CART ABANDONMENT RATE	ATTRITION RATE	MULTI TOUCH ATTRIBUTION
REGISTRATION	Measures the increase or decrease in registration numbers over time.	Track the cost of acquiring a registrant. Critical for budget optimization.	Highlights issues in the registration process if potential attendees are starting but not completing registration.	Provides insight into the potential reasons for non-attendance.	Determine which marketing channels are most effective at contributing to registrations.
SPONSORSHIP	SPONSORSHIP LIFETIME VALUE	EXHIBITOR GROWTH RATE	SPONSOR/EXHIBITOR RENEWALS	LEAD PER SPONSOR	LEADS QUALIFIED
	The long-term value of a sponsor based on historical engagement, renewal rates, and overall brand involvement.	The year-over-year growth in the number of exhibitors, indicating market interest.	Returning sponsors/exhibitors, which can gauge loyalty and satisfaction.	The number of leads generated per sponsor, signals the ROI for sponsors.	The number of leads that are considered to have a genuine potential for conversion.
NETWORKING	1:1 MEETING ATTENDANCE	ADVANCED LEAD SCORING	MEETING REQUEST ACCEPTANCE	NUMBER OF CONNECTIONS MADE	EXHIBITOR MEETINGS
	The show up rate of one-to-one meetings, signals the event's effectiveness in facilitating direct connections.	Post-networking, apply a lead scoring model that takes into account not just the quantity but the quality and follow-up rate of leads.	The number of networking meeting requests that are accepted, indicating the quality of matches or connections.	Could be through in-app connections if the event has a digital networking platform.	Tracks the number of meetings that exhibitors secure, indicating their networking success.
ENGAGEMENT	SATELLITE EVENTS PARTICIPATION	ATTENDEE SATISFACTION	EMAIL CLICK-THROUGH RATE	SOCIAL ENGAGEMENT	POLLS/Q&A /NOTIFICATIONS
	Measures the impact of vertical initiatives to engage the audience.	Feedback scores from attendees, which can impact future event attendance and word-of-mouth marketing.	Measures the effectiveness of email communications in engaging potential attendees.	Level of activity on social platforms related to the event, indicating brand reach and engagement.	Tracks participation and involvement with the different aspect of the event.
CONTENT	SESSION ATTENDANCE	SPEAKER IMPACT SCORE	REPLAYS	SLIDES DOWNLOADS	SESSION SURVEY RESPONSES
	Measures how many people are joining sessions, which is a direct indicator of content engagement.	Evaluate speakers on their impact on the audience, using metrics like social mentions, content sharing, and session ratings.	The number of times session content is replayed post-event, indicating the value and longevity of the content.	Number of times attendees download content, showing engagement and the value of the content provided.	The percentage of attendees providing feedback on sessions, reflecting willingness to contribute to future improvements.
IMPACT	PIPELINE SPEED	TARGET LEADS CONVERSION RATE	ATTENDEE GROWTH SCORE	ATTENDEE RETENTION	BEHAVIORAL CHANGE INDEX
	The speed at which leads move through the sales pipeline post-event.	The success rate at which targeted leads are converted into opportunities or sales.	Analyze individual attendee growth in terms of network, knowledge, and engagement from event to event.	Measures the number of attendees who return for subsequent events, which can indicate overall event success.	Measure the attendees' reported behavioral changes at regular intervals post-event.

45 TACTICS TO WIN YOUR CFO ON EVENTS

DIRECT REVENUE & MARGIN DRIVERS	1 HARD ROI EVIDENCE Past event cost → pipeline → closed-won \$\$, payback period, IRR.	2 REVENUE ATTRIBUTION MODEL Forecast incremental bookings (best / base / worst).	3 WIN-RATE UPLIFT Event-touched prospects close at higher % than control group.	4 PIPELINE VELOCITY Average sales cycle shortens for event leads.	5 COST-PER-LEAD VS. OTHER CHANNELS Show events' CPL vs. paid search / ABM.
RISK MITIGATION & COMPETITIVE EDGE	6 CUSTOMER LIFETIME VALUE BOOST Event attendees expand and renew more.	7 CROSS-SELL / UPSELL CONVERSION Quantify post-event expansion revenue.	8 SPONSORSHIP INCOME OFFSET External revenue lowers net event cost.	1 COMPETITOR ACTIVITY PROOF-POINTS Rivals' spend and gains from events.	2 FOMO / COST OF INACTION Lost share if you stay absent.
OPERATIONAL EFFICIENCY & DATA ASSETS	3 MARKET-DISRUPTION RADAR Events surface shifts earlier than reports.	4 CRISIS-REPUTATION REPAIR Controlled environment to rebuild trust.	5 BENCHMARKING POSITION Measure company standing live vs. peers	6 REGULATORY / INDUSTRY PULSE Stay ahead of compliance changes.	7 RISK-ADJUSTED ROI SCENARIOS Downside-protected X.
REAL-TIME MARKET RESEARCH	8 EXIT-READY DATA ROOM Robust lead & win analytics support valuations.	1 EVENT-TECH ROI Automation cuts staffing & agency spend.	2 DATA-COLLECTION VALUE Attendee intel fuels cheaper future campaigns.	3 REAL-TIME MARKET RESEARCH On-site insights beat survey lag.	4 LEAD QUALITY SUPERIORITY Lower SDR hours per opportunity.
STRATEGIC GROWTH & BRAND EQUITY	5 CONTENT AT SCALE Event footage reduces video/white-paper production costs.	6 PRESS COVERAGE MULTIPLIER Earned media reduces PR budget.	7 SOCIAL BUZZ Organic reach lowers paid social spend.	8 GLOBAL REACH EFFICIENCY One hub event beats multiple roadshows.	9 DIGITAL-TRANSFORMATION SHOWCASE Proves tech adoption to investors.
PEOPLE, TALENT & CULTURE BENEFITS	10 SUSTAINABILITY ALIGNMENT Measurable carbon goals avoid penalty costs.	11 EVENT PLAYBOOK REUSE Templated ops lowers marginal cost per event.	1 THOUGHT-LEADERSHIP PLATFORM Positions firm as category leader.	2 BRAND-AWARENESS LIFT Quantified share-of-voice and aided recall.	3 INNOVATION SHOWCASE Reinforce perception as pioneer.
PRODUCT-LAUNCH AMPLIFIER	4 PRODUCT-LAUNCH AMPLIFIER Compresses time-to-revenue for new SKUs.	5 PARTNERSHIPS Forge alliances that unlock new markets.	6 COMMUNITY BUILDING Loyal ecosystem lowers future CAC.	7 CUSTOMER ADVOCACY ENGINE Turn attendees into ambassadors.	8 C-SUITE VISIBILITY Execs meet investors, analysts, top clients directly.
RECRUITMENT MAGNET	9 BENCHMARK TO BOARD GOALS Tie event outcomes to OKRs / KPIs.	1 EMPLOYEE ENGAGEMENT SPIKE Morale lift reduces turnover cost.	2 RECRUITMENT MAGNET Events attract hard-to-hire talent.	3 UPSKILLING & TRAINING On-site education lowers L&D budget.	4 CROSS-DEPARTMENT COLLABORATION Sales-marketing-product alignment speeds GTM.
CUSTOMER SUCCESS SHOWCASES	5 CULTURAL REINFORCEMENT Live experiences embed company values.	6 EMPLOYEE RETENTION Engagement + growth paths cut rehiring spend.	7 CUSTOMER SUCCESS SHOWCASES Visible wins strengthen account health.	8 NETWORKING ROI Quantified high-value contacts per exec hour.	9 LONG-TERM BRAND GOODWILL Cumulative halo improves discount rate in valuations.

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Happy Planning

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