

Event Portfolio Mastery



Make the tough calls.

Back them with data.

Build a portfolio that delivers.



The Era of “Do More Events” is Over.

40%+

Costs Spiraling

Event costs rising while budgets remain flat or decrease¹

69%

Budgets Down

Event costs rising while budgets remain flat or decrease²

\$1.4T

Market Size

Saturated global events market³

The event space is noisy, expensive, and rapidly changing. Portfolio thinking isn't optional, it's your survival strategy.



Hi, I'm Stephenie.

What I Know to Be True About This Industry

Events drive business growth - but we don't always prove it.

Event teams do incredible work - with not enough credit.

Data isn't the enemy - it's our level-up.

Leadership wants clarity. You can give it to them.

➔ And that's exactly why we're here today.

A bit of the boring stuff...

25-year event veteran (bet I can work a fax machine!)

Portfolio consultant & deliver events globally in finance, tech, pharma

Board member. Book in progress. Mentor. Data nerd.



What Is an Event Portfolio Anyway?

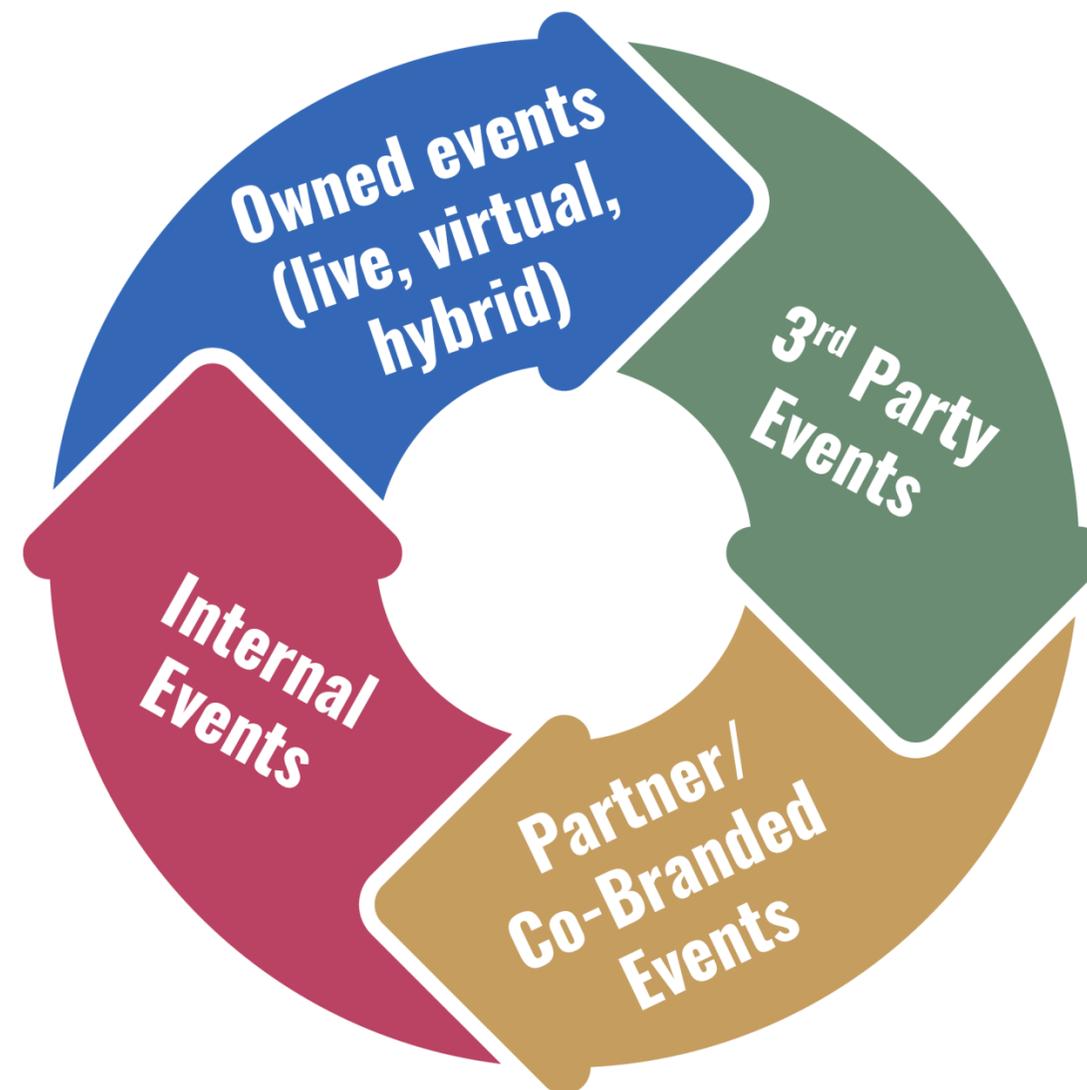
A strategic collection of events managed as business investments, not just marketing activities.

Owned Events

Live, virtual or hybrid events you control

Internal Events

Sales kickoffs, townhalls, trainings



3rd Party Events

Events you sponsor or participate in

Partner Events

Joint events with strategic partners



Why Portfolio Thinking Matters.

■ Cut 20% of your budget - which events have to go?



Strategic Decision Making

Move beyond politics and guesswork to data-driven choices



Resource Optimization

Allocate budget and team energy where impact is highest



Risk Management

Diversify event types to weather market changes



The Problem with Business-As-Usual.

Audience Behaviour

Unpredictable registration patterns & changing expectations

Event Complexity

Mid-size events squeezed between virtual efficiency & large-scale impact

Budgets Pressure

Every expense questioned while results demands increase

Leadership Clarity

Executives demand clear ROI & strategic alignment

Without a portfolio view, you can't give them that clarity.
With it—you become a strategic voice, not just an event operator.



Portfolio vs. Event-by-Event Approach.



Event-by-Event Approach

- Reactive Planning
- Isolated Decisions
- Political Choices
- Inconsistent metrics
- Resource Conflicts



Portfolio Approach

- Strategic Planning
- Systematic Evaluation
- Data-Driven Decisions
- Unified Measurement
- Optimized Allocation



Why Traditional Metrics Don't Cut It Anymore.



The Roast Beef Problem.



Operational Success \neq Business Value



Outdated Metrics Are Still Everywhere.

Many event teams still report on “Roast Beef” metrics — which don’t connect to business outcomes or justify investment.

Outdated Metrics (Activity Based)

- Attendee count
- Leads scanned
- Booth traffic
- Session attendance
- Social media mentions



Impact Metrics (Outcome Based)

- Pipeline influenced
- Opportunity velocity
- Deal acceleration
- Sponsor Retention
- Audience Quality Index



Audience Quality Index.

Quality Challenge

\$500/pP cost, but sales brings friends to fill seats.

Who's in the Room

Attendee list quality determines event success more than logistics.

Intent Alignment

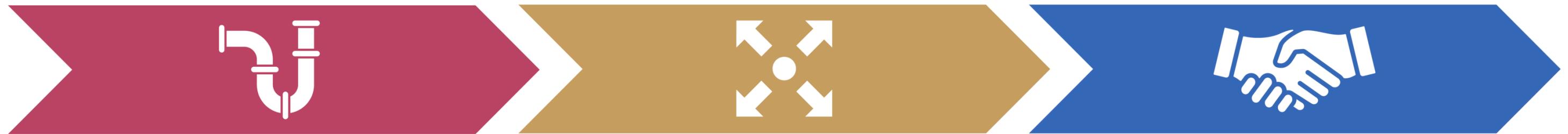
Attendees must come with aligned mindset and intention.



Do we have the right people - in the right frame of mind - in the right room?



Shifting From Outputs to Outcomes.



Pipeline Connection

Lead gen & opportunity
advancement through
direct engagement

Expansion Opportunities

Cross-sell & upsell
touchpoints with
existing customers

Brand Trust Building

Long-term relationship
equity & market
positioning

**87% of attendees say discovering new products/solutions is most important
element of in-person events.⁴**



Who Owns the Deal?

- 1 Awareness**
Events introduce solutions
- 2 Consideration**
Events provide validation
- 3 Decision**
Events build confidence
- 4 Retention**
Events deepen relationships



Events influence deals but rarely own them entirely.
Modern B2B buyers have upwards of 26 touchpoints before decisions are made.

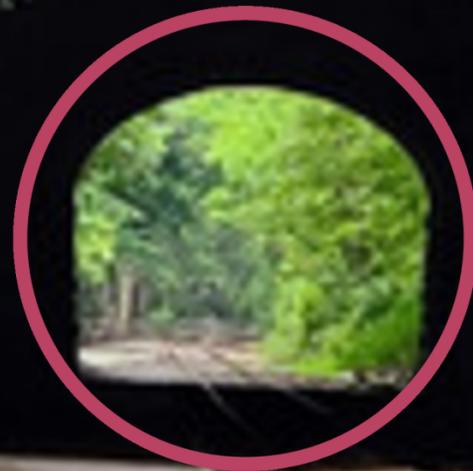


Traditional Attribution Models Fail.



“...the most beautiful train journey I’ve ever had! 10/10 would recommend!”

- Marty Mighty, Verified Customer



Single-, First- & Last-Touch Attribution



Making Event Influence Visible.



**Traditional attribution models miss mid-journey event impact.
Time-based, multi-touch attribution captures true influence.**



Tech Stack Pragmatism.



Excel is Valid

Sophisticated tools aren't required to begin a portfolio approach



Show Value First

Build the case for better tools by demonstrating results



Don't Wait

Perfect conditions never come; start with imperfect data

Start with what you have. Build sophistication strategically.



Tiered Tech Stack for Event ROI.



Foundation

Core Tools: CRM, Email Marketing Platform

Measurement: Spreadsheets (Excel) for manual data aggregation

Key Action: Master basic attendee tracking & post-event survey data.



Growth

Core Tools: MarTech, Event Mgmt Software (EMS)

Measurement: Basic dashboards or native EMS reporting

Key Action: Integrate EMS with CRM/MarTech for lead scoring and progression.



Optimization

Core Tools: Robust MarTech + EMS, CRM, Data Warehouse

Measurement: Advanced BI tools feeding into a central data lake

Key Action: Implement predictive analytics & attribution models for event impact.



Portfolio Maturity Assessment.



Discover Your Event Portfolio Maturity Level

How strategically managed is your event portfolio? This comprehensive assessment evaluates your organization's approach to event portfolio optimization across six critical dimensions: strategic foundation, measurement sophistication, decision-making frameworks, resource allocation, executive communication, and organizational integration.

What to Expect:

- 31 thoughtful questions designed to estimate your organization's portfolio maturity
- The assessment will take approximately 5-6 minutes to complete
- You'll receive immediate, detailed results with actionable insights for your portfolio maturity level
- Complete anonymity - no IP tracking, no follow-up unless you choose to connect

Your assessment will reveal where your event portfolio currently operates, along with specific recommendations for advancing your portfolio's strategic impact.

When you're ready, let's dive in!



Practical Next Steps.

Here are 5 high-impact moves you can start today:

1. Check your organization's portfolio maturity with our assessment tool:
<https://beyondbrandingevents.com/portfolio-assessment>
2. Create your current portfolio inventory
3. Conduct one stakeholder conversation
4. Audit your current metrics
5. Map one event to attribution windows

This is just the beginning. Take these steps to build momentum for workshop 2 where we will accelerate.



Ready to Optimize Your Event Portfolio?

Let's Work Together



Ready to Turn Your Event Portfolio into a Strategic Asset?

We help event teams move from reactive planning to strategic portfolio management. We start with alignment, then work with you to build the tools to deliver on it.

sl@BeyondBrandingEvents.com

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Take the survey here:



[BeyondBrandingEvents.com/
portfolio-assessment](https://BeyondBrandingEvents.com/portfolio-assessment)