

Event Portfolio Mastery



Make the tough calls.

Back them with data.

Build a portfolio that delivers.



The \$250k Question

■ **Cut \$250k off your budget - which events have to go?**



Can you answer that question confidently?

Hi, I'm Stephenie.

Here's What I've Learned About This Industry

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

Event teams do incredible work - often without the credit they deserve.

Data isn't the enemy - it's how we get a seat at the table.

Leadership wants clarity. You can give it to them.

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

The credentials bit...

25-year event veteran with an MSc in International Event Management

Portfolio consultant working globally in finance, tech, media.

Managed corporate portfolios across 26 markets.

Board member. Book in progress. Systems thinker. Data nerd.



Today's Roadmap



Organizational Alignment



Business Values

- Market expansion
- Category creation
- Ecosystem development



Sales Values

- Pipeline generation
- Deal acceleration
- Customer acquisition

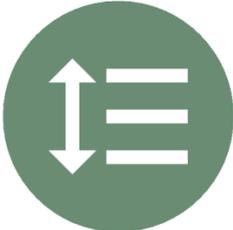
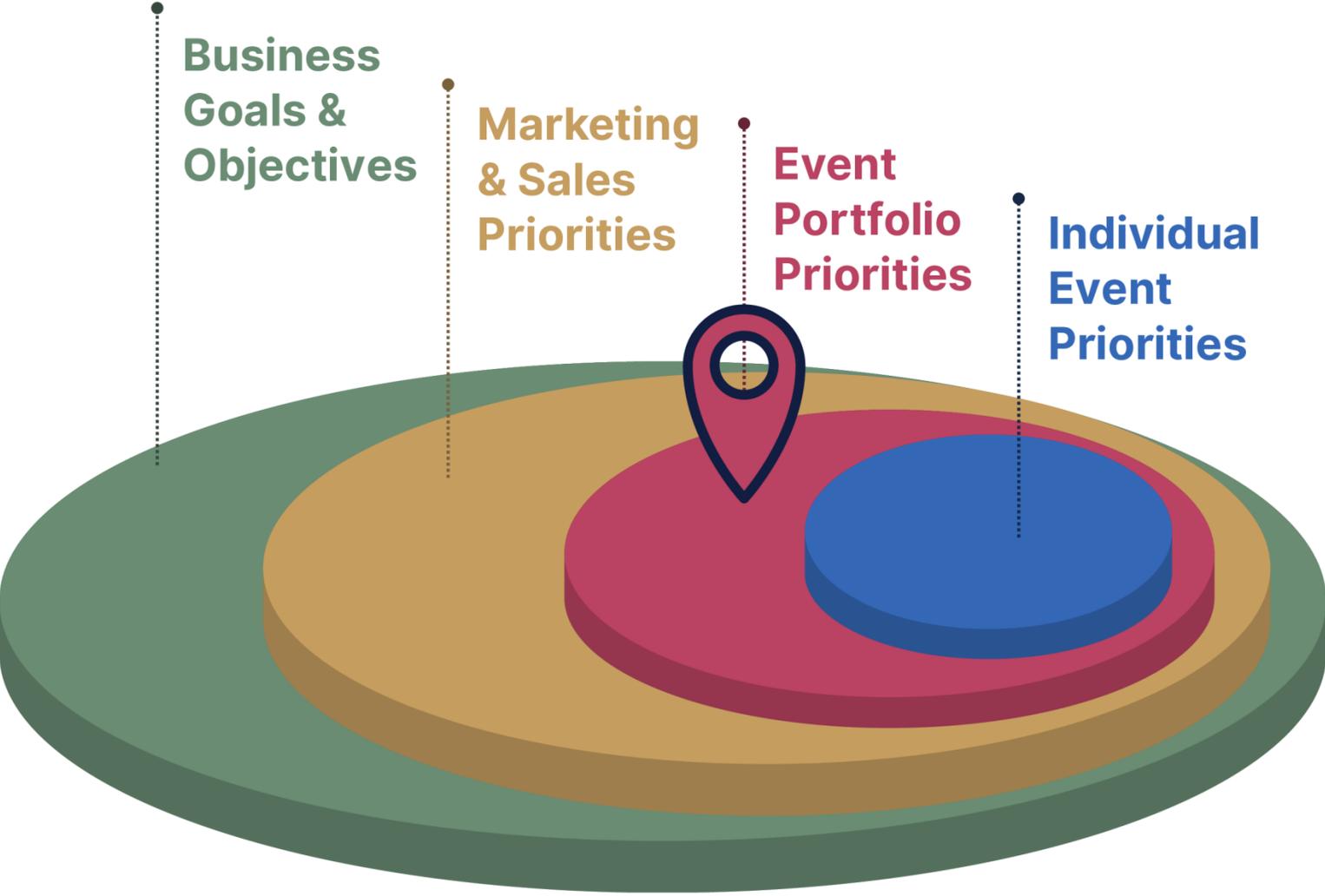


Marketing Values

- Brand awareness
- Thought leadership
- Community building

Each value type requires different success metrics.

Where Portfolio Intelligence Fits



Business Goals & Objectives
Top-level direction



Marketing & Sales Priorities
Strategic alignment layer



Event Portfolio Priorities
Intelligence lives here



Individual Event Priorities
Tactical Execution Level

Portfolio Balancing

Once you have portfolio intelligence, you can also answer:

Balance across objectives

Over-invested in lead gen vs. expansion?

Audience & geography

Priority segments or easy wins?

Owned vs. 3rd party events

What's our ratio? Should it be different?

Customer journey mapping

Where do events actually sit?

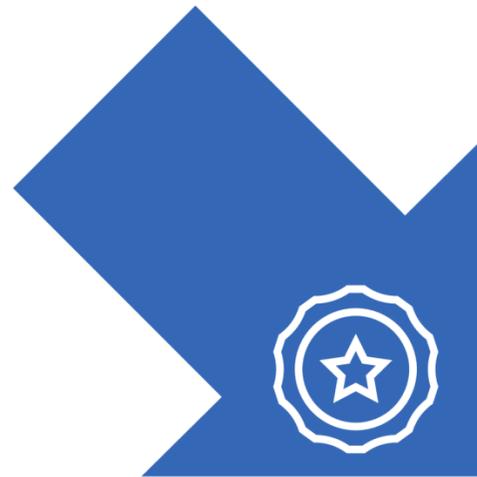
These questions are IMPOSSIBLE to answer without portfolio-level data

Core Data Collection - What to Track

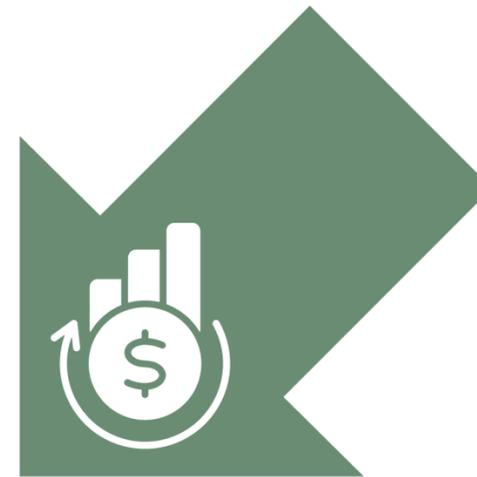
Event Basics

Type, format, audience size, cost structure, resource efficiency

01



02



04



03



Qualitative Signals

Exhibitor rebooking, executive access, account engagement

Business Metrics

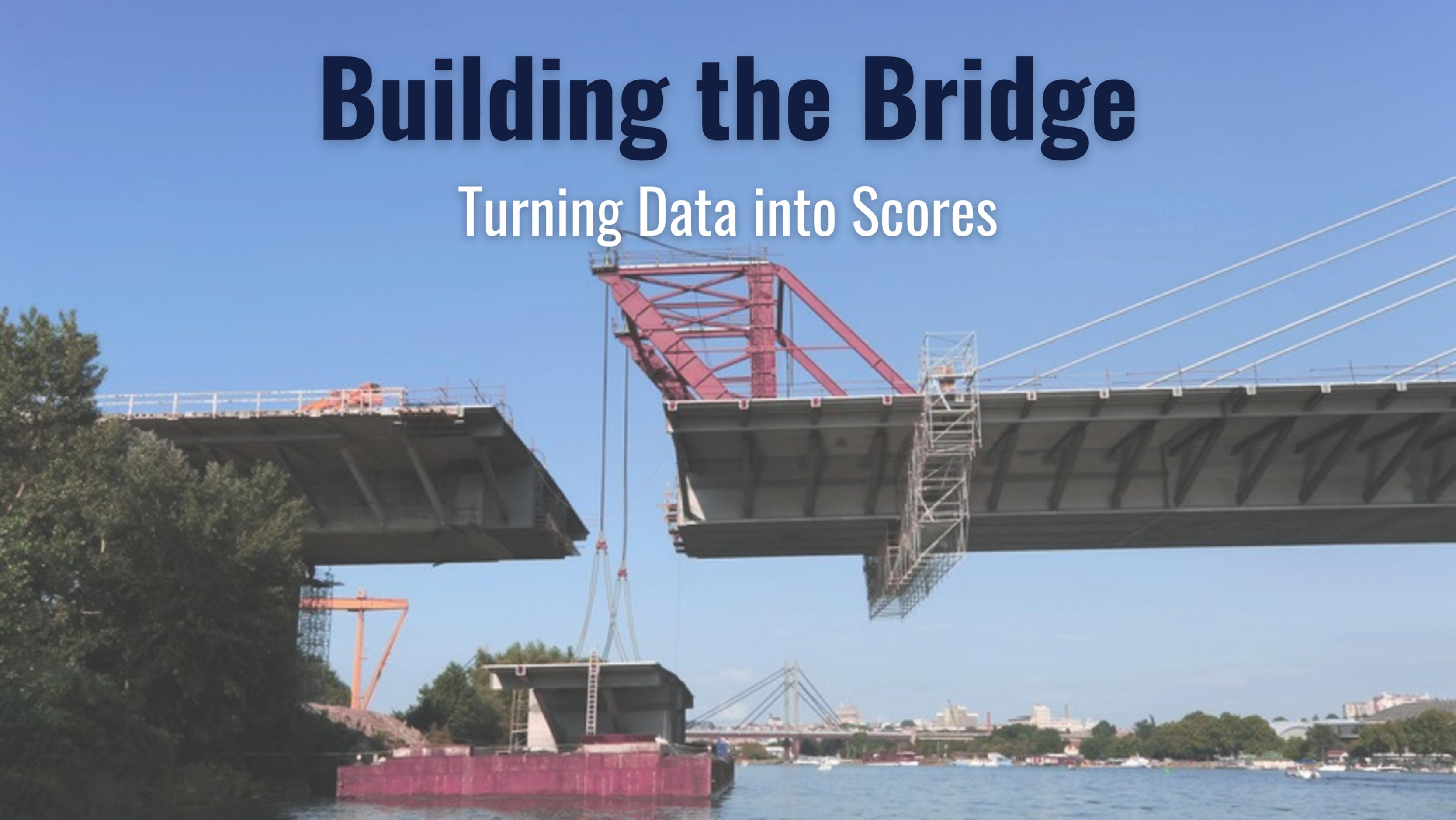
Pipeline, revenue, retention, engagement rates

Strategic Metrics

Market priority, audience quality, growth potential, ecosystem health

Building the Bridge

Turning Data into Scores



The 2-Dimensions Framework

Organizational alignment first, then measurement



Dimension 1: Business Impact

- Revenue Influence
- Conversion Metrics
- Paid Ticket Growth
- Attendee Quality Index
- Sponsor Retention



Dimension 2: Strategic Alignment

- End User / Vendor Ratio
- Market Priority (Geo/Sector)
- Editorial Alignment
- Brand Positioning
- Product Strategy Alignment

The Scoring Scale - A Reference Guide

Weighted averages across multiple criteria per dimension

Ranking Scale Definitions

Business Impact (1-5 scale):

- 1. Minimal Impact:** Limited financial contribution, minimal growth, low profitability
- 2. Low Impact:** Below average financial performance, limited market influence
- 3. Moderate Impact:** Average financial performance, stable but not exceptional
- 4. Strong Impact:** Above average financial performance, good growth trajectory
- 5. Exceptional Impact:** Top-tier financial performance, excellent profitability and growth

Strategic Alignment (1-5 scale):

- 1. Minimal Alignment:** Does not support strategic objectives or brand positioning
- 2. Low Alignment:** Limited support for strategic objectives, poor brand fit
- 3. Moderate Alignment:** Supports some strategic objectives, acceptable brand representation
- 4. Strong Alignment:** Clear support for multiple strategic objectives, good brand fit
- 5. Exceptional Alignment:** Perfectly aligned with core strategic priorities, exemplifies brand

Profitability:

- 1. Negative:** <0%
- 2. Low:** 0%-<51%
- 2.5 (3) Average:** Portfolio average for the year (2024: 62%)
- 4. Strong:** >51%-<75%
- 5. Exceptional:** >75%

Attendee Growth

- Flat:** +/- 10%
- Slow Growth / Slow Decline:** +/- 15%

Sponsor Retention:

- 1. Decline:** 0% - <34
- 2. Min. Decline:** >34
- 2.5 (3) Flat / New:** Retention average for the year (2024: 32%)
- 4. Min. Growth:** >36 - 40%
- 5. Growth:** >40%

Member Participation

- 1. Low:** <10%
- 2. Below Avg:** <16% - >10%
- 2.5 (3) Avg:** >16%, <19% (2024: 17%)
- 4. High:** >19% - <25%
- 5. Exceptional:** >25%

Paid Tickets Growth

- 1. Decline:** >-15%
- 2. Min. Decline:** >-5% - <-15%
- 2.5 (3) Flat / New:** Similar to the year before
- 4. Min. Growth:** >5% - <15%
- 5. Growth:** >15%

Sponsor Retention Score:

- GREEN (3 points): Portfolio average > 30%
- YELLOW (2 points): Portfolio average 20-30%
- RED (1 point): Portfolio average < 20%

End-User Ratio Score:

- GREEN (3 points): Portfolio average > 55:45
- YELLOW (2 points): Portfolio average 45:55 to 55:45
- RED (1 point): Portfolio average < 45:55

Classification Mix Score:

- GREEN (3 points): Stars + Cash Cows > 50% of portfolio
- YELLOW (2 points): Stars + Cash Cows = 30-50% of portfolio
- RED (1 point): Stars + Cash Cows < 30% of portfolio

Revenue Achievement Score:

- GREEN (3 points): >95% of target achieved
- YELLOW (2 points): 85-95% of target achieved
- RED (1 point): <85% of target achieved

Profit Scoring

- 1.** <\$ 90,000
- 2.** < \$147,000
- 2.5 (3)** \$147,001 - \$185,000 (avg \$169,400)
- 4.** < \$250,000
- 5.** > \$ 250,000

Profit Margin Scoring

- 1** - <40%
- 2** - <50%
- 2.5 (3)** - <70%
- 4** - <85%
- 5** - >85.1%

The 2-Dimensions Framework

Event Name	Tier	Quarter	Attendee Growth	Total Paid Tix	Total Free Tix	Total Attendees	Avg Rev per paid tix	Event Age	Profitability	Sponsor Ret.	Paid Ticket Growth	Brand Positioning	Market Priority	Member Particip.	Business Impact	Strategic Alignment
EU Conference 2024 - BER	3	24/Q1	Flat	126	49	175	\$ 742.54	2 years & under	1	3	5	4	3	2	3.8	2.8
USA Conference 2024 - NYC	2	24/Q1	Growth	75	192	267	\$ 1,289.33	Mature	5	1	5	4	3	4	3.0	3.5
Asia Conference 2024 - SIN	1	24/Q2	New	142	222	364	\$ 1,841.13	2 years & under	5	1	3	2	2	1	1.8	1.7
Energy 2024 - LON	1	24/Q2	Flat	129	41	170	\$ 5,609.46	Mature	2	1	1	3	2	4	1.0	2.8
EU Conference 2024 - BER	3	24/Q2	Flat	106	46	152	\$ 1,419.91	Mature	5	3	5	4	3	5	3.8	3.8
AI Trends 2025 - ORD	2	25/Q2	Flat	110	50	160	\$ 1,061.27	2 years & under	5	3	2	4	3	5	2.3	3.8
AI Trends 2024 - ORD	2	24/Q3	New	164	48	212	\$ 2,296.10	2 years & under	4	3	3	3	3	4	2.5	3.0
Global Event 2024 - LAX	2	24/Q3	Growth	30	579	609	\$ 2,666.67	Mature	5	4	2	5	5	5	3.0	5.0
Pharma Event 2024 - DTW	1	24/Q4	Growth	47	199	246	\$ 1,255.11	2 years & under	1	3	5	5	5	1	3.8	3.7
Transport Confex 2024 - PHI	1	24/Q4	Growth	125	167	292	\$ 6,156.40	3-5 years	5	4	5	5	5	5	4.5	5.0
Global Event East 2024 - DBX	2	24/Q4	Decline	156	204	360	\$ 3,663.78	3-5 years	5	5	4	2	1	1	4.5	1.3
India Confex 2025 - DEL	2	25/Q1	Min. Declin	83	244	327	\$ 4,927.23	2 years & under	5	3	1	3	4	3	1.8	3.0
USA Conferenc 2024 - NYC	3	25/Q2	Decline	18	129	147	\$ 3,055.56	Mature	1	2	3	4	2	5	2.3	3.7
Asia Confex 2025 - SIN	1	25/Q3	New	41	268	309	\$ 2,124.00	New	5	3	3	3	3	1	2.5	2.0

**Dimension 1:
Business Impact**

**Dimension 2:
Strategic Alignment**

Scoring

Framework Overview

Different questions, different tools

Portfolio Performance Quadrant

Strategic Prioritization

Event Heat Maps

Diagnostic Multi-Dimensional View

Growth-Share Matrix

Lifecycle & Investment Decisions

Portfolio Quarterly Overviews

Snapshot of key financial & ops metrics

Key principle: Pick the right tool for the conversation

Portfolio Performance Quadrant

Mapping to a strategic matrix

Place each event in the quadrant that fits:

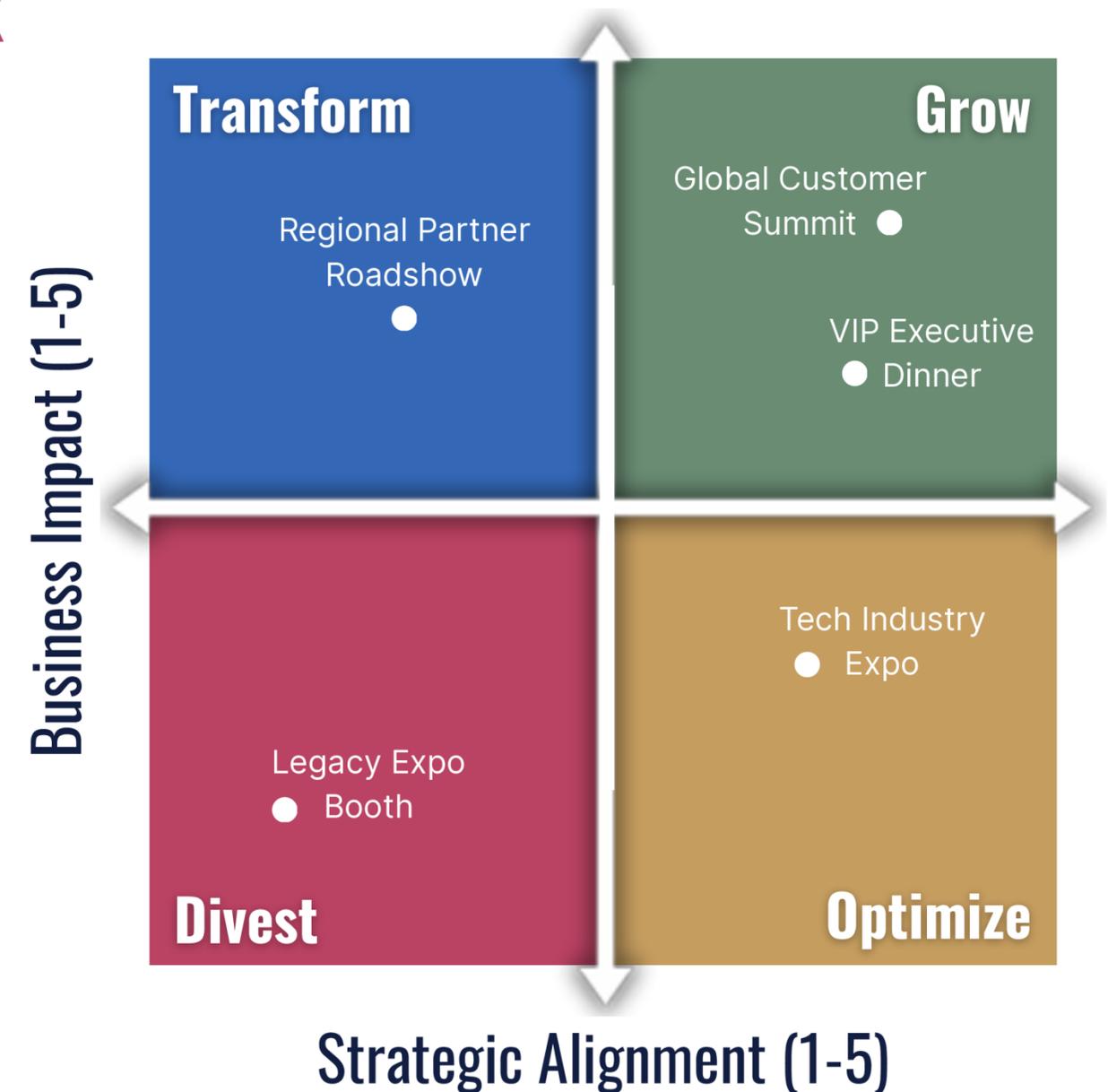
- Transform: High alignment, low impact → Redesign
- Grow: High alignment, high impact → Double down
- Optimize: Low alignment, high impact → Improve ROI
- Divest: Low alignment, low impact → Phase out/ replace

X-axis: Strategic Alignment (Low → High)

Y-axis: Business Impact (Low → High)

When to use:

Executive conversations about portfolio strategy
The visual makes it easier to communicate with leadership, avoid emotional debates, and create consensus.



Growth-Share Matrix - Lifecycle View

Mapping to a lifecycle matrix

Place each event in the quadrant that fits:

- Question Marks: Analyze & decide
- Stars: Double down & invest
- Cash Cows: over-reliance is risky
- Dogs: Sunset or replace

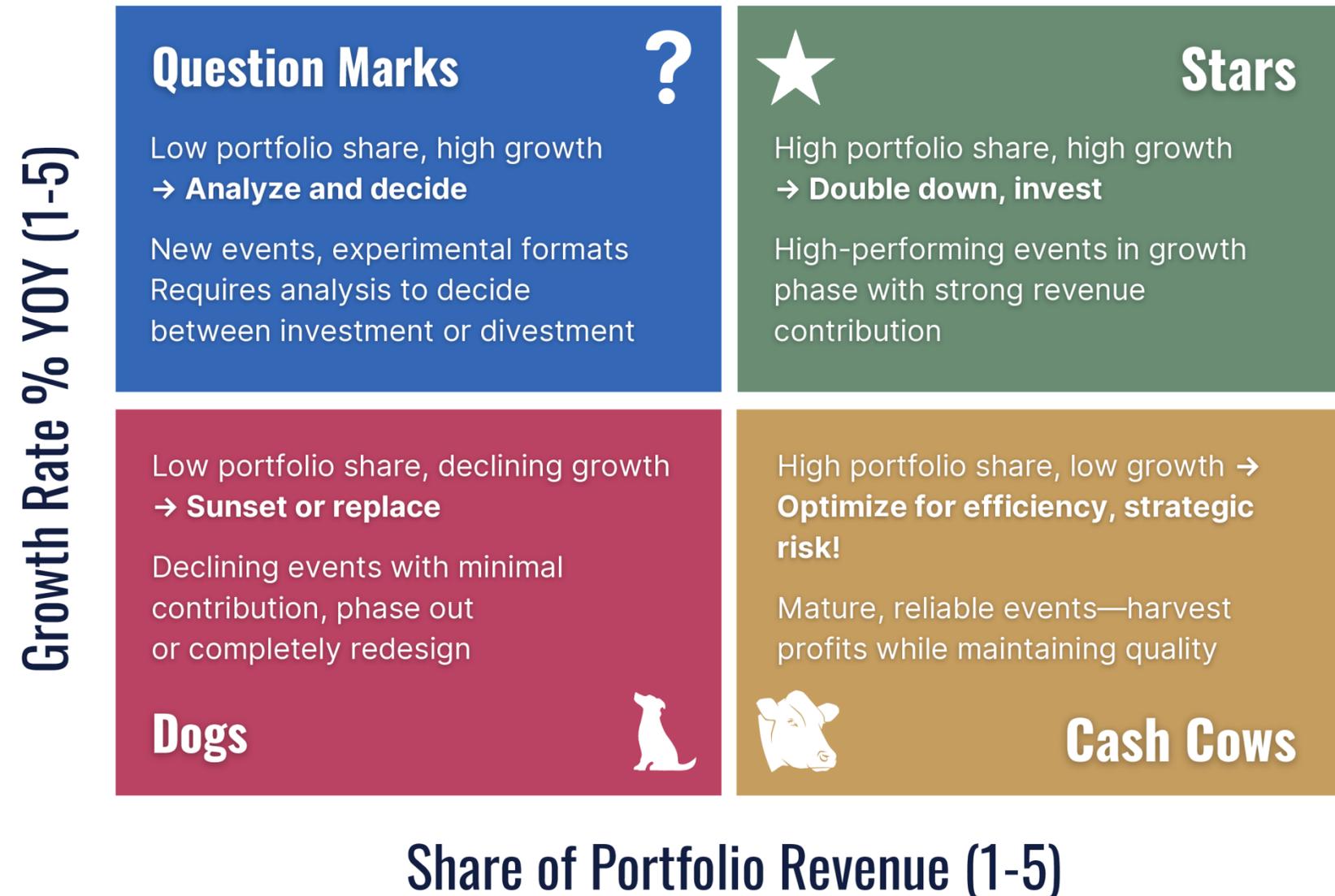
X-axis: Share of Portfolio Revenue (Low → High)

Y-axis: Growth rate % YOY (Low → High)

When to use:

Multi-year portfolio planning and reviews.
Budget allocation and resource decisions
across lifecycle stages Identifying events to
scale, optimize, or sunset.

Adapted from the BCG Matrix



Portfolio Heat Maps - Health

Event Name	Quarter	Tier	Sponsor Retention	Revenue Value	Profit Value	Health
EU Conference 2024 - Berlin	24/Q1	3	2	1	1	1.4
USA Conference 2024 - NYC	24/Q1	2	3	3	3	3
Asia Conference 2024 - Singapor	24/Q2	1	2	3	3	2.6
Energy 2024	24/Q2	1	2	1	1	1.4
EU Conference 2024 - Berlin	24/Q2	3	3	3	3	3
AI Trends 2025	24/Q2	3	3	3	3	3
AI Trends 2024	24/Q3	1	2	1	2	1.7
Pharma Event 2024	24/Q4	1	3	3	3	3
Transport Confex 2024 - Philadelphi	24/Q4	1	2	1	1	1.4
USA Conferenc 2024 - NYC	25/Q2	3	3	3	2	2.8
Asia Confex 2025	25/Q3	1	3	1	1	1.8
AI Trends 2025	25/Q4	2	2	3	3	2.6

1=LOW
2=AVG
3=HIGH

Portfolio Health Weighting

(Sponsor retention score x 40%)

(Revenue value score x 25%)

(Profit value score x 35%)

When to use:

Quick visual health check to identify at-risk events requiring immediate attention across multiple performance dimensions.

Portfolio Heat Maps - Performance

When to use:

Spot patterns and outliers across your portfolio to identify which events need strategic intervention based on impact and alignment scores.

Event	Tier	Quarter	Business Impact	Strategic Alignment
EU Conference 2024 - Berlin	3	24/Q2	3.8	3.8
AI Trends 2025	3	24/Q2	2.3	3.8
AI Trends 2024	1	24/Q3	2.5	3.0
Global Event 2024 - Las Vegas	2	24/Q3	3.0	5.0
Pharma Event 2024	1	24/Q4	3.8	3.7
Transport Confex 2024 - Philadelphia	1	24/Q4	4.5	5.0
Global Event East 2024 -Abu Dhabi	2	24/Q4	4.5	1.3
India Confex 2025	2	25/Q1	1.8	3.0
USA Conferenc 2024 - NYC	3	25/Q2	2.3	3.7
Asia Confex 2025	1	25/Q3	2.5	2.0
AI Trends 2025	2	25/Q4	1.0	3.0

Portfolio Quarterly Overview

When to use:

Track performance trends over time to identify improving or declining quarters and inform annual planning and budget allocation decisions.

Q1 2024				
# Events	Avg Feedback	Avg Sponsor Retention	Profit	Profit Score
3	3.80	33%	\$359,198	1.67

Q2 2024				
# Events	Avg Feedback	Avg Sponsor Retention	Profit	Profit Score
6	4.43	32%	\$1,233,574	2.00

Q3 2024				
# Events	Avg Feedback	Avg Sponsor Retention	Profit	Profit Score
4	4.45	38%	\$2,234,828	1.75

Q4 2024				
# Events	Avg Feedback	Avg Sponsor Retention	Profit	Profit Score
5	4.23	40%	\$798,823	1.80

Q1 2025				
# Events	Avg Feedback	Avg Sponsor Retention	Profit	Profit Score
1	4.40	33%	\$288,443	2.00

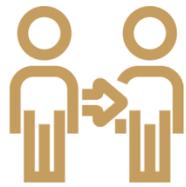
Q2 2025				
# Events	Avg Feedback	Avg Sponsor Retention	Profit	Profit Score
1	4.70	64%	\$20,990	1.00

Q3 2025				
# Events	Avg Feedback	Avg Sponsor Retention	Profit	Profit Score
1	4.30		\$323,482	3.00

Q4 2025				
# Events	Avg Feedback	Avg Sponsor Retention	Profit	Profit Score
1	4.60	0%	\$0	

Other Portfolio Views

Pick what answers YOUR questions



Audience Overlap Map

Event cannibalization analysis



Resource Allocation Map

Team capacity vs event requirements



Geographic Distribution

Events vs. customer locations



Customer Journey Map

Events plotted across buying stages



Owned vs. 3rd Party

Investment ratio visualization



Tier Architecture

The 3-tier system with budget allocation

Framework Selector



Strategic prioritization

Performance Quadrant



Lifecycle decisions

Growth-Share Matrix



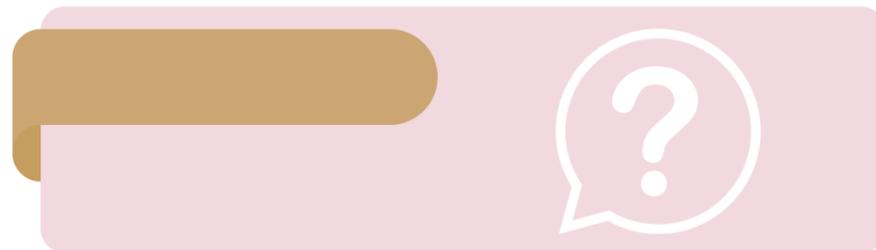
Health check

Heat Maps



Time-based trends

Quarterly Overview



Specific questions

Pick from other views

From Data to Scores

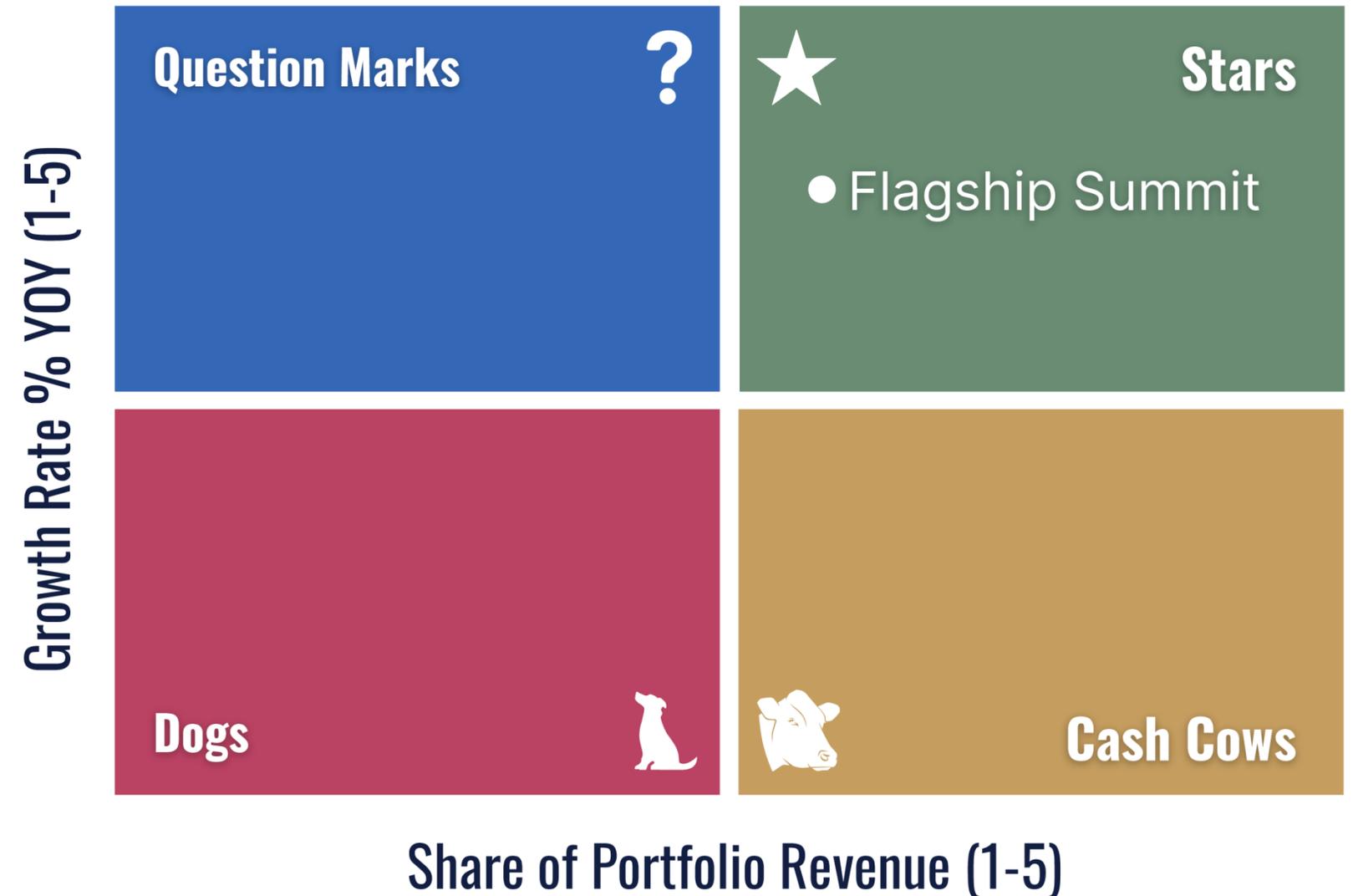
Flagship Summit Walkthrough

Raw Metrics

- 500 attendees
- €150K cost
- €2M pipeline
- 85% satisfaction

Portfolio Metrics

- Total portfolio pipeline influenced \$10m
- Historical Comps:
 - 2024: \$1.5m
 - 2025: \$2m
- Growth Rate: 33% YoY
- Cost per dollar influenced: \$0.075



From Data to Scores

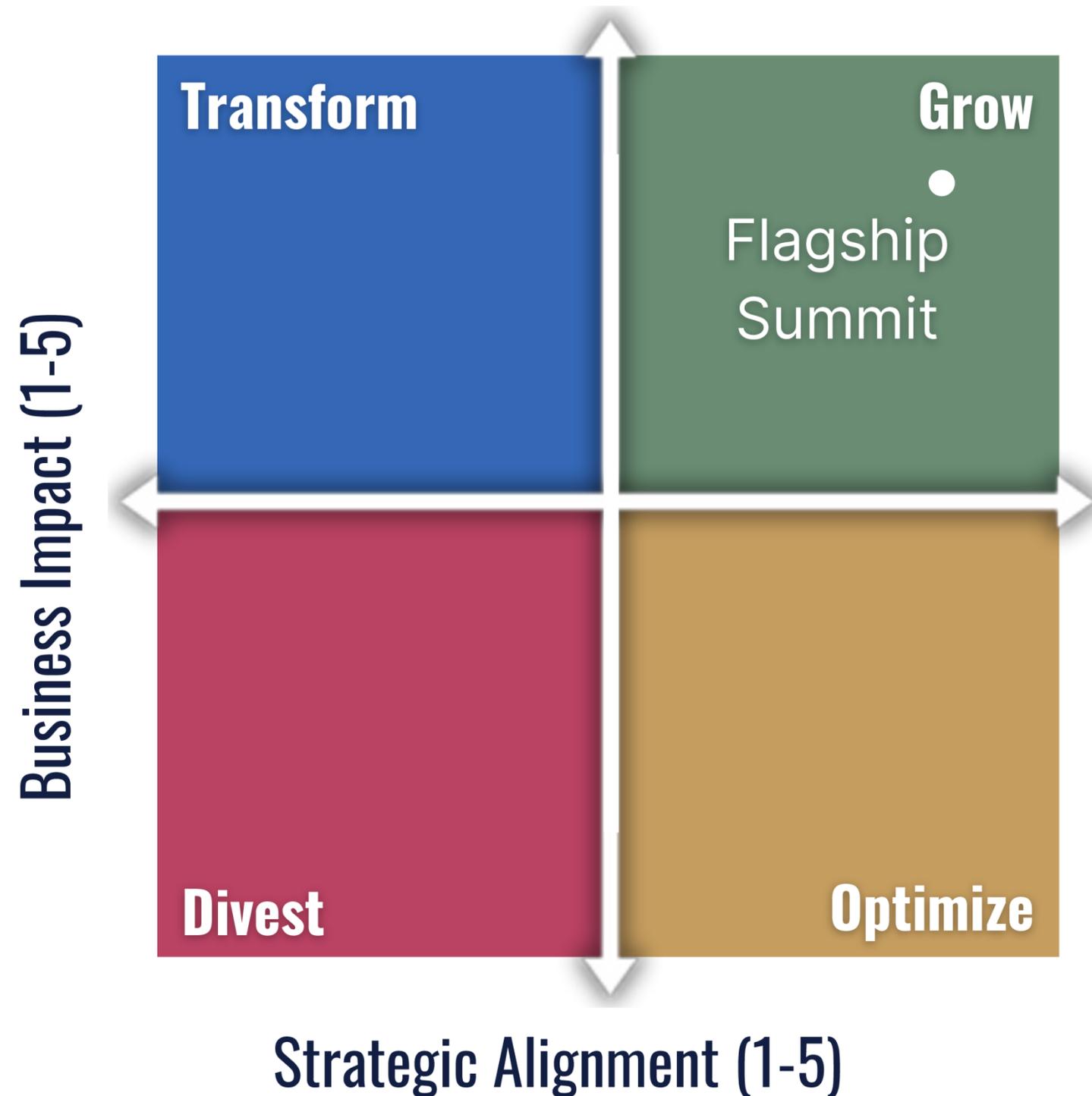
Flagship Summit Walkthrough

Business Impact

- Pipeline: 5
- Cost efficiency: 4
- Retention: 4
- **Average: 4.3**

Strategic Alignment

- Goal alignment: 5
- Audience quality: 4
- Market Alignment: 5
- **Average: 4.7**



Scoring in Practice

Ranked Scoring Example

Event Name	Strategic Fit	Pipeline / Profit	Engagement / NPS	Cost Efficiency	Team Load	Total Score
Flagship Summit	5	5	4	3	4	21
Regional Roadshow	3	2	4	5	4	18
Partner Expo	4	3	2	2	3	14
VIP Dinner Series	5	4	5	4	2	20
Sponsored Booth	2	1	2	1	5	11

Each event gets an aggregate score, and more importantly, become rankable.

This gives you a defensible, objective way to say:

“These are our top performers, and these are the ones we need to re-think.”

Setting Success Benchmarks

Cost-to-Return Performance Thresholds

Transform 1-2x return: Strategic changes	Grow 4x+ return: Double down
<1x for 2 cycles: Cut or reinvent Divest	2-4x return: Keep current level Optimise

Owned vs. 3rd Party Investment

Industry guideline: **60% owned / 40% 3rd party**

Early growth: **70% 3rd party / 30% owned**

Mature companies: **60%+ owned / 40% 3rd party**

Spend by Marketing Objective

Lead Generation: **30%**

Expansion: **25%**

Awareness: **20%**

Acceleration: **20%**

Adopt/Optimize: **5%**

Industry guidelines based on B2B event portfolio research and practitioner benchmarks, 2024.

Adjust based on your organization's strategic priorities.

Defensible Decision Making

"Here's the **data** showing which events deliver against strategic goals"

Standardized evaluation = apples-to-apples comparison

Creates objective basis for budget discussions

Removes politics from the conversation (mostly!)

You can now answer the \$250K question

Portfolio Optimization Principles

Kill Your Darlings

Sentimental attachment isn't strategy. "We've always done this" is not a reason to continue

Diversify Risk

Don't put all budget in one event type. Balance experimental bets with proven performers

Resource Reallocation is Strategic

Cutting one event funds two experiments. Moving budget from Dogs to Stars compounds returns

The 70/20/10 Investment Rule

70% in proven Stars • 20% in improving Question Marks • 10% in experiments

Decide Based on Trends

One bad year doesn't mean cut it. Two bad years in a row? Time to act

Optimization is Continuous

Quarterly reassessment • Annual restructuring • Strategic refresh every 2-3 years

Portfolio intelligence gives you permission to make hard decisions with confidence

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

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,

Take the survey here:



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