



Event Portfolio Mastery

Make the tough calls.

Back them with data.

Build a portfolio that delivers.

Your Journey: From Foundation to Action



Workshop 1: Foundation

Established WHAT belongs in
your portfolio and WHY it
matters



Workshop 2: Intelligence

Built measurement systems,
categorization frameworks,
strategic mapping



Workshop 3: Decisions

Transform insights into
recommendations leadership
actually listens to

The Real Problem: Data Without Decisions

Drowning in Data

Sheets of incompatible data from multiple systems with no common structure

Clarity Crisis

Leadership unclear about success metrics across portfolio

**Impossible Questions: When to sunset? What to scale?
How to prove value?**

We've Got It Bass-Ackwards



Current Reality

- Event teams trying to prove value without guidance
- Tracking metrics after the fact
- Burden of proof without business context
- Planners expected to be consultant-level analysts



What Should Happen

- Success signals defined by leadership
- Clear business targets established
- Investment aligned to strategy
- Event teams execute with clarity

Budget Season: What's At Stake

Here's what's on the line



Relegated to Execution

Less pay, less respect, increasing pressure to do more with less



Impossible Expectations

Content manager, community builder, sales pro, brand manager, data analyst—all at once



The Solution

Speak the language of business. Relate events to business outcomes.

Today's Roadmap

1

Strategic Decision Frameworks

Rules for making tough calls with confidence

2

Executive Communication Mastery

Speaking the language of investment, not activity

3

Portfolio Optimization in Action

Real examples bringing it all together

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.



Strategic Decision-Making Frameworks



Six Portfolio Optimization Principles



Kill Your Darlings

Sentimental attachment isn't strategy.



Diversify Risk

Don't put all budget in one event type.



Resource Reallocation

Cutting one event funds experiments.



70/20/10 Investment Rule

Balance proven performance with innovation



Decide Based on Facts

One bad year = trend. Two+ bad years = facts.



Optimization is Continuous

Quarterly review, annual restructure, strategic refresh

Kill Your Darlings

The Hardest Decision

The Challenge

Legacy events, pet projects, SALY

The Truth

Intangible returns must still be defined

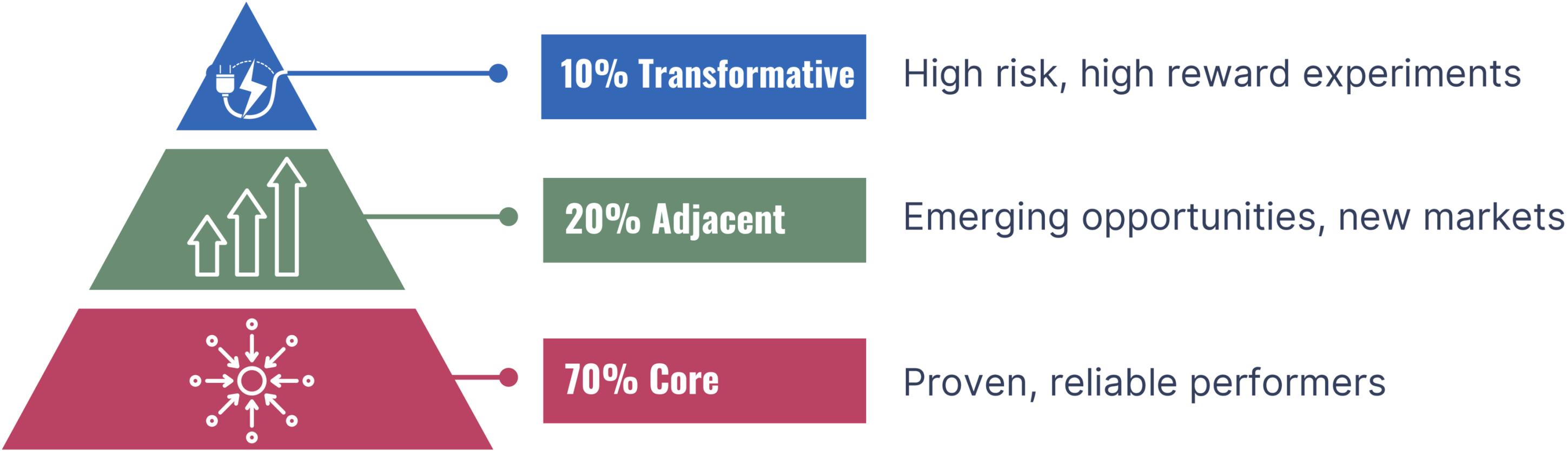
Your Role

Provide objective data and input



Tradition doesn't equal strategy, but sometimes traditions wins anyways.
Your job is to make sure everyone knows the trade-offs.

The 70/20/10 Investment Rule



Core (70%)

Goal: Optimize efficiency

Flagship conferences, recurring seminars, established performers

Adjacent (20%)

Goal: Drive growth

New formats, new markets, emerging opportunities

Transformational (10%)

Goal: Foster innovation

Experimental formats, unproven ideas - most will fail

Facts vs Trend-Based Decisions



One Bad Year = Trend

Not enough to pull the plug
Market shift, external factors, needs
tweaking

Sunset Candidates

No business impact OR strategic alignment
Shouldn't consume resources



Two+ Bad Years = Facts

Time to act decisively
Pattern established, intervention
required

Tweakable Events

Achieving in area, underperforming in another
Optimize to improve performance

Optimization is Continuous

1

Quarterly Updates

Performance checkpoing, budget reconciliation
Review events according to sales cycles
Leadership updated means no surprises

2

Annual Restructuring

Review past year achievements
Reassess resource allocation
Stay agile with changing priorities

3

2-3 Year Strategic Refresh

Trends become facts over multiple cycles
Make hard, data-based portfolio decisions
Major strategic realignment



Strategic Quadrants Framework

Categorize events to apply optimization principles



- Transform: Invest in strategic shifts
- Grow: Scale high-potential initiatives
- Optimize: Improve core offerings
- Divest: Sunset low-value assets

There's no simple way to define these axes. You must understand the **BUSINESS** you're in - and that's not necessarily the **EVENT** business.

GROW

Categorize events to apply optimization principles



High Business Impact & High Strategic Value

Global Customer Summit, VIP Executive Dinner Series



Scale & Replicate

Increase attendee cap, add programming days, expand to new regions

Investment Strategy

Double down. Remove constraints. Increase budget for premium elements.

TRANSFORM

Realign High-Impact Events



High Business Impact & Low Strategic Alignment

Profitable Sales Fair pulling resources from a strategic product launch



Redesign for Alignment

Rebuild format, shift audience, and overhaul content to reinforce strategic goals.

Convert high-performing but off-mission events into strategically integrated experiences.

Investment Strategy

Reinvest in redesign and audience targeting. Maintain impact, improve strategic relevance, and ensure long-term sustainability.

OPTIMIZE

Improve Efficiency of Strategic Events



High Strategic Alignment & Low Business Impact

Essential Product Training Workshop (strategically important but too costly or underperforming)



Streamline & Automate

Move online, repurpose content, and reduce operational costs while preserving strategic intent.

Investment Strategy

Cut unnecessary spend. Automate delivery, standardize formats, and reinvest savings into higher-performing strategic programs.

DIVEST

Phase Out Non-Performers



Low Business Impact & Low Strategic Alignment

Legacy Expo Booth — low ROI, not supporting strategic objectives



Phase Out or Replace

Eliminate outdated or ineffective formats. Reallocate time and budget to events that drive measurable business value.

Investment Strategy

Zero-based budgeting. Remove emotion from decisions. Use data and performance reviews to justify cuts and redirect resources strategically.

Executive Communication Mastery



The Language Shift

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

Activity Language

“We had 1,200 attendees, up 10% YOY. Full house, maxed capacity.”

Reports on **effort**, not impact.



Impact Language

“Event X delivered \$1.5M in projected pipeline, but was **capacity-constrained**. An additional \$50k investment would scale to \$2.5M.”

Reports on **blocked return on capital**.

The Roast Beef Problem.



Operational Success \neq Business Value

Stop Using “Roast Beef Metrics”



The Problem

Big, impressive, but low-value data that tells you nothing about business impact.



Worst Offender

Total Registered Attendees
ignores cost to acquire (CAC), target audience fit



Better Metrics

Qualified Attendees
Target Persona Match Rate
Cost per Qualified Lead

Executive reporting should focus on business value in order to enable strategic decision making.

The BLUF Approach

Bottom Line Up Front



Lead with Conclusion

"We need to reallocate 20% of portfolio budget to fund two new high-impact experiments."



Send Memo Early

Send Decision Memo Early 24-48 hours before meeting. Executives read before they arrive.



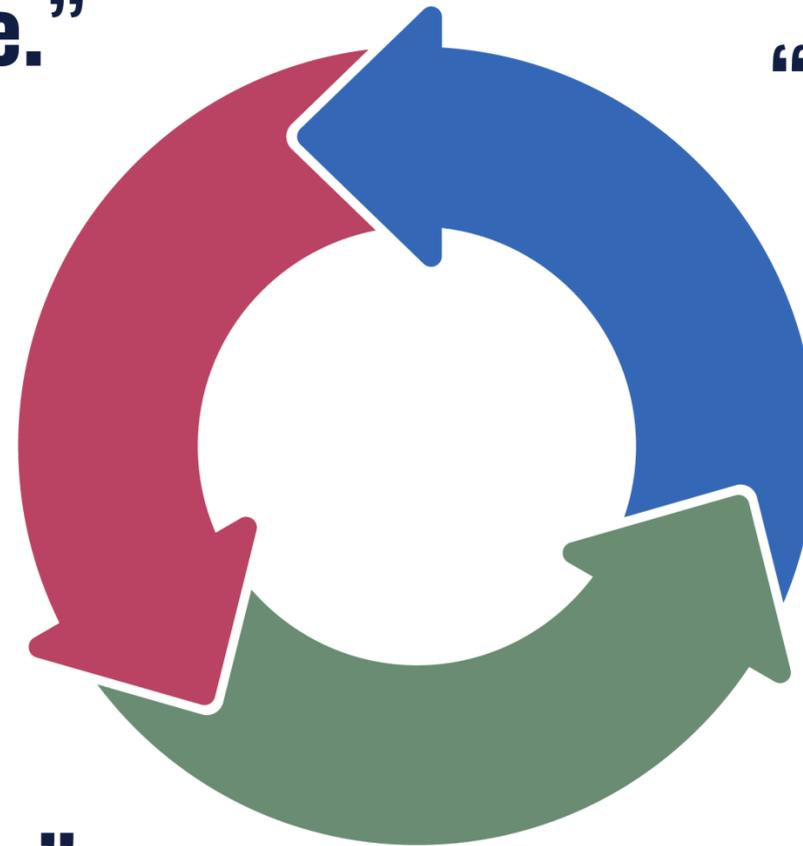
Present Live for Q&A

80% summary and recommendation, 20% detail. Meeting becomes discussion, not lecture.

Handling Objections

“We don’t have the people.”

Turn into a decision point. “This assumes we free capacity by cutting Events X and Y. Or delay to Q3. Which do you prefer?”



“We’ve always done it this way.”

Acknowledge history, pivot to current performance. “That history is why we need this conversation. Cost-per-lead increased by 60% while pipeline dropped by 40%”

“The team will be nervous.”

Redirect to opportunity. “Cutting underperforming events frees resources to double down on what’s working.”

The Hardest Objection



“I Don’t Believe Your Data”



Pause

Stop the conversation immediately.

Investigate

“Which data specifically concerns you? Let me walk through the methodology.”

Verify Together

Show source data. Build trust in the foundation.

The Transparency Strategy

How to avoid objections in the first place



Invite Stakeholders to Score

Run facilitated workshop with cross-functional leaders. Determine scoring criteria together and present the Portfolio Matrix.



Goal: Alignment on Criteria

Not consensus on decisions - alignment on how decisions are made.



Document Everything

If someone has objections later, refer to documented process and sign-off criteria.



Portfolio Optimization Strategy in Action

Portfolio Performance Quadrant

Mapping to a strategic matrix

Place each event in the quadrant that fits:

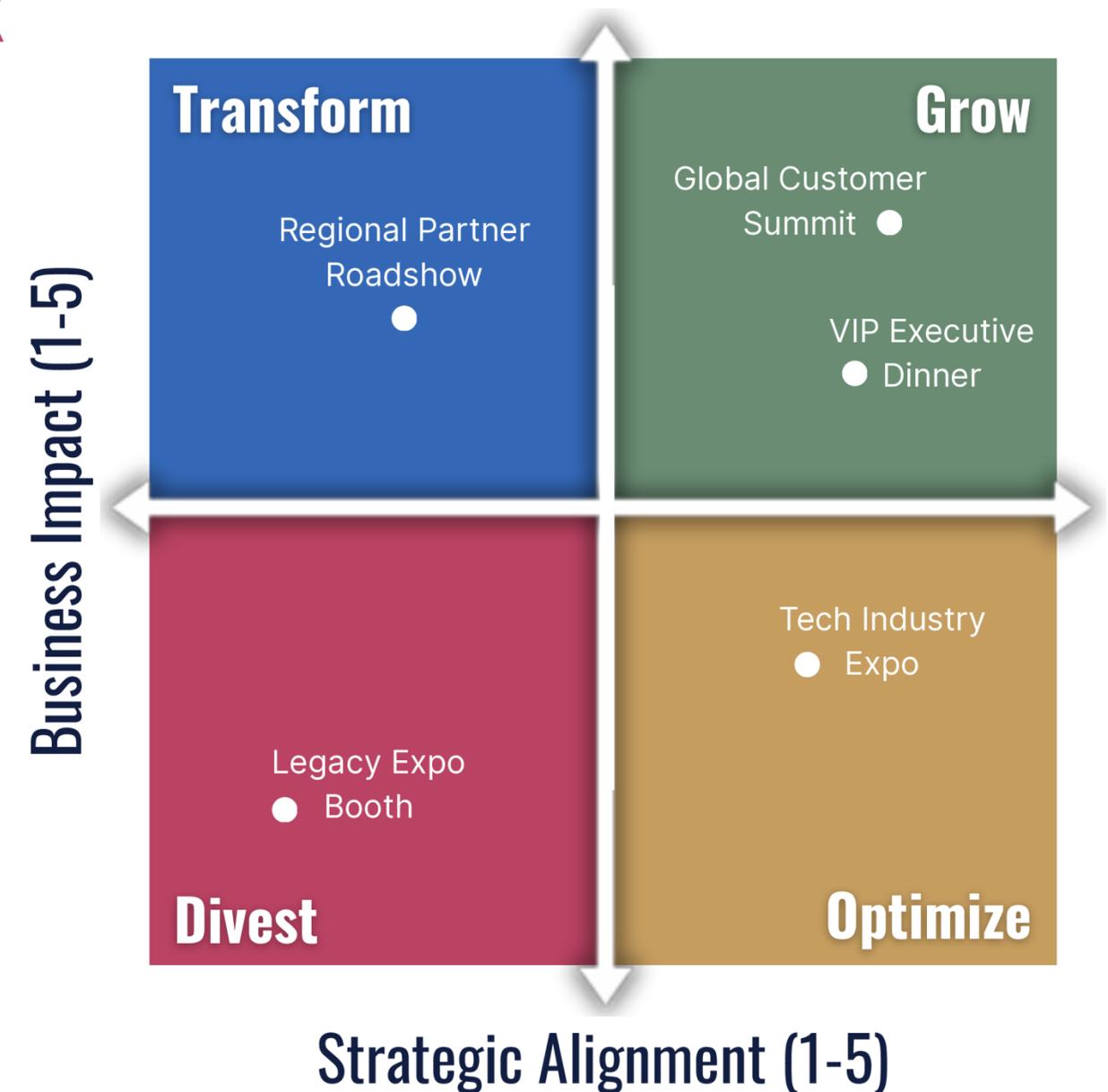
- Transform: High alignment, low impact → Redesign
- Grow: High alignment, high impact → Double down
- Optimize: Low alignment, high impact → Improve ROI
- Divest: Low alignment, low impact → Phase out/ replace

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.



Scenario 1: Budget Cut



Cut DIVEST Event

Legacy Expo Booth: Low impact & Alignment

\$60K saved



Optimize Low Performer

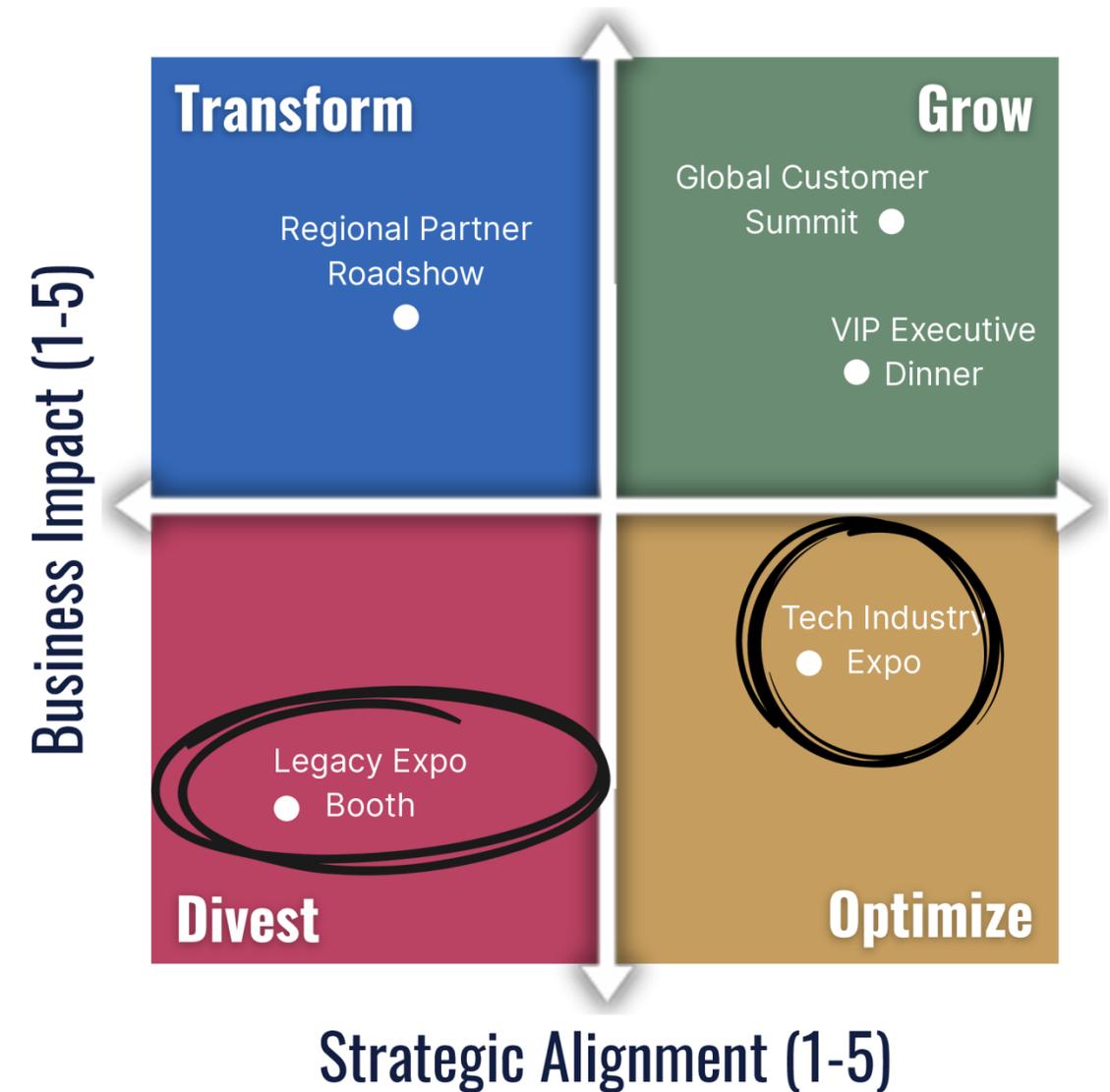
Tech Industry Expo: Reduce booth size, shift to speaking only

\$30K saved



Strategic Reallocation

Reinvest \$15k into VIP Dinner expansion (4x ROI)
Hold \$15K as contingency. Give back \$60K (20% of \$350k budget)



This isn't a budget cut but rather a strategic reallocation. You turned cuts into a growth opportunity.

Scenario 2: Growth Investment



Scale GROW Events

\$80k: Expand Global Customer Summit
\$40K: Increase VIP Dinner frequency
\$120K allocation



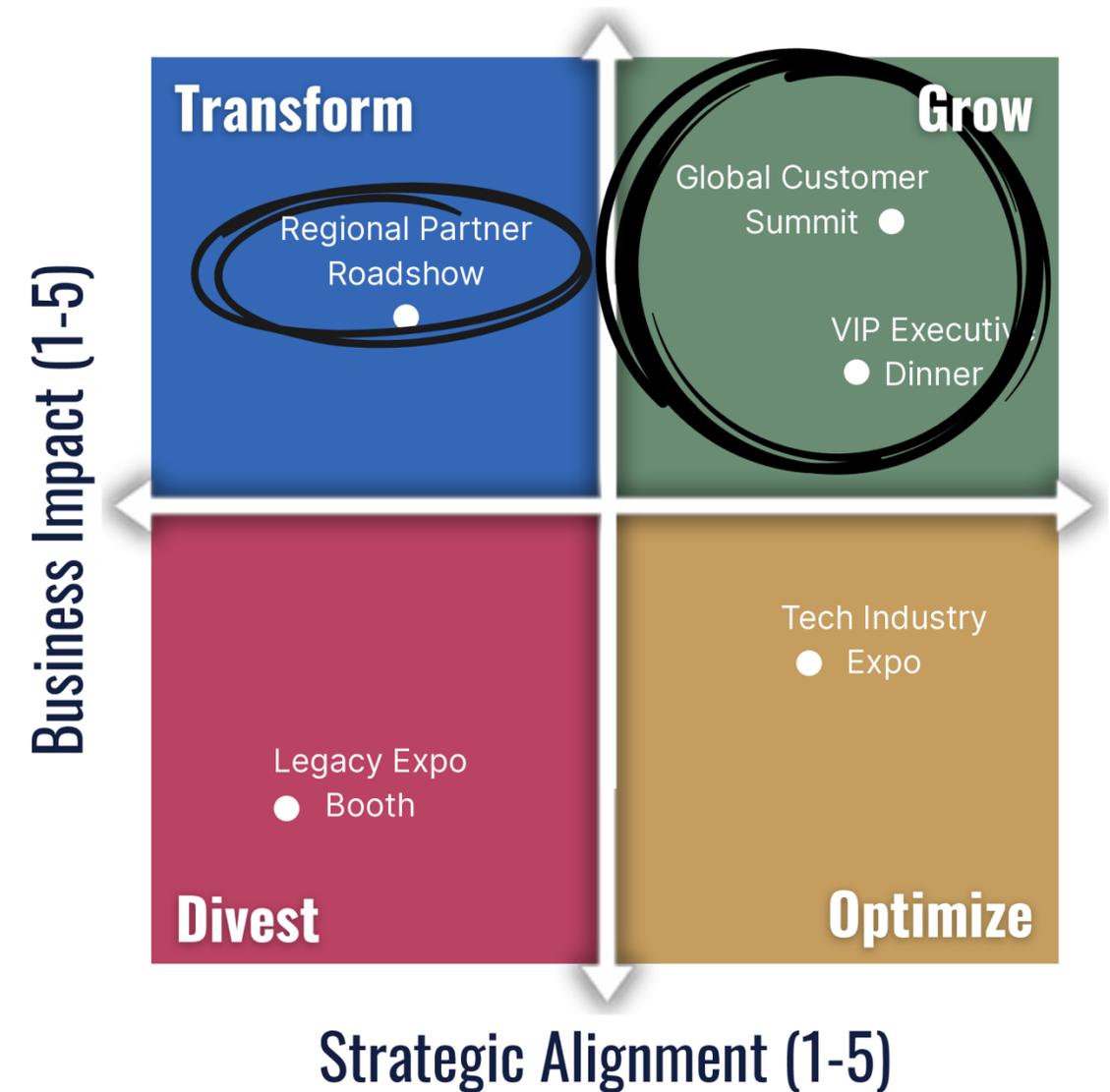
TRANSFORM Misaligned Event

Regional Partner Roadshow: Redesign to align with strategic priorities
\$50K allocation



TEST New Formats

Run two micro-events with clear success criteria
\$30K allocation



Maximize ROI on proven performers while de-risking with experimentation.
This turns spend into strategic investments.

Scenario 3: Annual Portfolio Refresh

GROW

Global Customer Summit: +20% investment, expand to second city

VIP Dinner: Increase from 2x to 4x annually

TRANSFORM

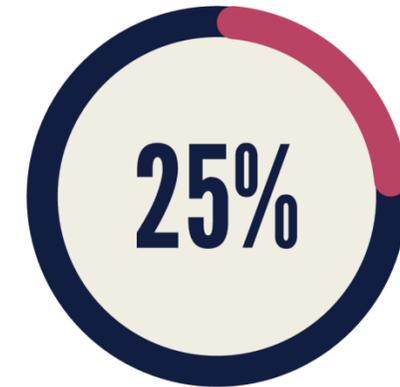
Regional Partner Roadshow: Redesign content & targeting to increase strat. alignment from 2 to 4

OPTIMIZE

Tech Industry Expo: Reduce booth presence, shift to speaking only format

DIVEST

Legacy Expo Booth: Phase out entirely by Year 2, reallocate budget to GROW



Projected Pipeline Increase
Through strategic reallocation



Budget Change
Portfolio budget stays flat

The Portfolio Decision Memo

One-page executive summary following BLUF structure

The Ask (2-3 sentences)

Lead with recommendation in first paragraph

Portfolio Performance Summary

3-4 bullets: current investment, pipeline, top/underperformers

Strategic Rationale

2-3 paragraphs explaining “why” with quadrant logic & objective data

Projected Impact

3-4 bullets: pipeline increase, cost efficiency, risk mitigation

Next Steps

2-3 action items with owners & dates

Entire memo fits on one page.

Execs can read it in 90 seconds.

Example: Strategic Rationale

“The Legacy Booth lands in the DIVEST quadrant. Over the past 2 years, it’s Cost-Per-Lead has increased 60% while pipeline contribution has dropped 40%. **The data indicated diminishing returns.**”

What You’re NOT Saying

“I don’t like this event.”

Subjective, emotional, easy to dismiss.

What You ARE Saying

"The data shows this event is underperforming against objective criteria."

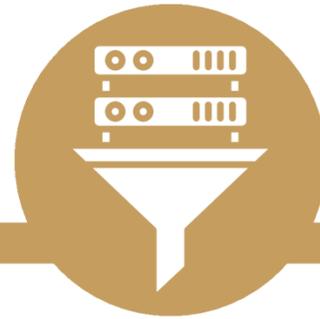
Data-driven, defensible, strategic.

Packaging Strategic Recommendations



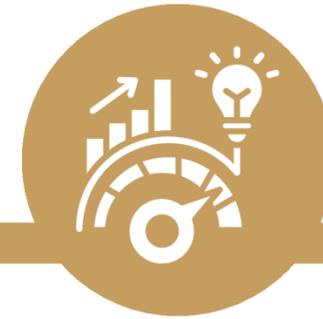
Clear Ask

Recommendation in first paragraph, no guessing where this is going



Data-Backed

Objective criteria and performance metrics support every decision



Projected Impact

Show leadership exactly what outcomes to expect

You Can Do This

Scenarios Mastered

Budget cuts, growth investment, portfolio refresh - you know how to handle them all

Clear Decision Frameworks

Use quadrants to make defensive, strategic choices

Executive Communication

Package decisions in 90-second memos that leadership can act on.

This is the work. This is how you move from “execution only” to being a strategic advisor.



Ready to Optimize Your Event Portfolio?

Let's Work Together



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



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)

Q & A

Thanks for being here.