Mastering the Art of Event Project Management

The All-In-One Guidebook to Project Management Success
Hosting an event can be a great way to showcase your brand, connect with potential customers, and build relationships with industry leaders. Despite these benefits, however, event planning comes with a unique set of challenges, and from determining the right event format to effectively engaging with attendees, it’s not unusual for event planning and marketing professionals to describe events as a marketing channel to “endure” rather than as one to “exploit.”

So, how can you “lighten the lift” and improve your team’s event planning experience while ensuring each event generates enough ROI to justify the investment?

The key to getting events right is to approach each event, whether your audience and your participants are virtual or in-person, with a proven project management methodology for planning the entire event lifecycle, no matter the size and complexity of the event. By partnering with the right event vendors, you can leverage their experience and best practices to create a comprehensive event strategy, streamline your planning processes, and delight event attendees.

Here at 6Connex, we’ve hired and worked with the industry’s biggest and brightest, including Direct Connection Advertising & Marketing, an integrated marketing and communications firm specializing in the insurance industry. Direct Connection offers tailored strategies for wholesale insurance brokers and other insurance entities such as associations, carriers, clusters, aggregates, insurtechs, and service providers. Their primary goal is to manage the complex marketing needs of these companies, allowing the companies to concentrate instead on their core business relationships.

We recently had the opportunity to interview some of 6Connex’s and Direct Connection’s thought leaders to learn more about improving the event planning experience and optimizing the use of event planning technology.

Meet Kristen Nevins
Kristen Nevins, the Director of Marketing & Operations at Direct Connection, has been instrumental in shaping digital marketing strategies and planning in-person events since she joined the company in 2018. With a decade-long career in marketing and communications, Nevins has a particular focus on the insurance industry. With an educational background in Communications and Special Event Management, her credentials include a Certified Digital Marketing Professional designation and recognition as one of Insurance Business America’s Rising Stars in 2022.

Meet Kristen (KT) Tener
Complementing Nevins’s expertise, Kristen (KT) Tener, the lead project manager on virtual events at Direct Connection, has vast experience in event operations and project management. Tener joined the Direct Connection team in 2020 and works closely with Nevins in planning and executing in-person events. Tener’s educational background is in Administration and Leadership, and she became 6Connex Partner Certified in 2022, further solidifying her credentials in the field.

Meet Michael Chance
With more than 15 years in the event planning industry, Michael Chance is the Customer Experience Manager at 6Connex, where he works closely with global organizations to strategically maximize event technology to meet and exceed event goals. He is an experienced event professional with a demonstrated history of working in complex, fast-paced environments focusing on excellence in customer service. Michael has supported some of the world’s most well-known brands to plan and execute onsite, hybrid, and virtual events, and he is skilled in project management, customer service and journey, sales, and operations. With a background that includes working as a director and producer of films and commercials, Michael brings a uniquely creative approach to the event solutions he tailors for clients. Michael was named one of Connect x BizBash’s 40 Under 40 in 2022.
Nevins and Tener stress that event planners and marketers should adopt a project management mindset, and before the first call is made or email is sent, all event stakeholders should schedule a time to meet and:

- Define the scope of the event.
- Identify all event stakeholders’ expectations and determine event goals.
- Set a budget.
- Outline all tasks that must be completed and assign deadlines and owners.

While the above activities may seem intimidating to busy marketers, the latest event technology goes a long way toward simplifying and automating many manual processes. It also integrates disparate point solutions, so event planners and marketers can plan and host events within a single technology ecosystem and leverage one source of truth. This includes everything from managing budgets and vendors to creating floor layouts and event schedules.

Identify a Project Manager

Nevins and Tener also emphasize that, like managing a project, it’s important to designate a project manager for each event. The project manager will be vital in coordinating all aspects of the event, from initial planning to execution, while ensuring the event meets the stakeholders’ expectations and achieves event goals. Good project managers are skilled in communication, negotiation, problem-solving, and risk management, and today, it helps to have a project manager who is also event tech savvy with experience using common tools in event management software such as ticketing, engagement, and reporting.

Identify a Customer Experience Manager

In addition to designating a project manager, Nevins and Tener agree that appointing a customer experience manager is wise. Insert, Michael Chance.

While the role of the project manager will be to focus on the execution of the event, the customer experience manager (Chance) will have an eye for attendee engagement and satisfaction.

The Customer Experience Manager plays a vital role in event planning by serving as a premiere consultative outlet for client programs. With their expertise in data analytics and program utilization, they provide strategic recommendations that significantly enhance the engagement offerings in hybrid and virtual venues. By measuring the results of newly added features and services, our CEM, Chance, has over 15 years of experience in the virtual venue industry. He ensures that client programs achieve greater attendee satisfaction and a better ROI. His valuable insights and tactical recommendations contribute to the success of the overall event experience.
Answer the Five “W’s”

When scoping out an event, Nevins and Tener follow best practices and work with their clients to identify the five “w’s:”

1. **Who:** Identify all people involved in the event, including attendees, event organizers, sponsors, and speakers. By first understanding who is involved, you can tailor the event to meet their needs and expectations.

2. **What:** Answer the questions:
   - What type of event are we hosting?
   - What is the purpose of the event?
   - What are the specific goals we want to achieve?
   - What activities will take place?

3. **Where:** Identify your preferred event location, keeping in mind that the location can have a significant impact on the logistics, cost, and overall success of the event.

4. **When:** Select a date(s) for the event and remember that timing can influence attendees’ availability, venue cost, and other logistical factors.

5. **Why:** Articulate why you are hosting the event. For example, are you hosting the event to drive leads, generate brand awareness, or more? Understanding the “why” will help you align the event plan with the objectives and goals of the event stakeholders.

Plan Events with Purpose

According to Nevins and Tener, goal setting is one of the most important activities during the event scope phase. Both experts stress that event stakeholders should take the time upfront to have detailed discussions and align on the event’s vision, objectives, and key performance indicators. They also note that third parties, such as an outsourced marketing firm like Direct Connection or a technology vendor like 6Connex, can be instrumental in these discussions. Both will wield knowledge based on previous experience with similar events or clients and can provide valuable insights into what works and what doesn’t, helping to guide expectations, goals, and metrics for tracking ROI and providing recommendations to avoid potential pitfalls and replicate past successes.

In addition to goal setting, the Direct Connection team suggests that all event stakeholders define the boundaries of the event and agree on what will be included in the project and what will not, including resource assignments, timelines, and cost estimates. This prevents scope creep, a common issue where the project’s requirements exceed the original goals, leading to delays, increased costs, and potential conflicts.

Anticipate Obstacles

The Direct Connection team notes that it’s best practice to identify potential obstacles early and have contingency plans in place. In their experience, common problems include budget constraints, venue availability, supplier and vendor issues, and unforeseen weather or public health emergencies. Seasoned project managers will have experience with workarounds and crisis communications and with leading teams through change to help mitigate the impact of any disruptions.

### Step 3

**Consider a Hybrid Event Format.**

| In-person events: 20 – 30 weeks out | Virtual events: 12 weeks out |

There’s little doubt that in-person events offer personal connections and immersive experiences that virtual events have difficulty matching. They allow attendees to try products, enjoy entertainment, and network in a way that is impossible through a screen.

On the other hand, virtual events offer convenience and accessibility that in-person events can’t achieve. They can be attended from anywhere in the world, and they allow attendees to personalize the experience and participate how, when, and where they choose. In addition, virtual events often have lower costs and positive environmental impacts, bolstering event ROI.

Fortunately, you can now have the best of both worlds. According to Markletic, 65% of companies with 2,000 - 5,000 employees and 71% of organizations with 5000+ employees now have hybrid events on their calendars—for a good reason.

Hybrid events are more sophisticated than ever and are gaining popularity due to their broad audience appeal. Attendees, presenters, and sponsors who want to travel and attend an event in-person can, and those more comfortable participating in an event digitally also have this option. With traditional boundaries such as event size and location removed, companies can attract a wider audience, engage a broader panel of speakers and sponsors, and present a deeper content agenda—all of which appeal to event planners and marketers looking to increase brand awareness, accelerate lead generation, and reinforce customer connections.

Partner with an Experienced Event Technology Provider

If you decide to take a hybrid approach to your in-person event and incorporate virtual components, Nevins and Tener note that the complexity of the event plan will increase, and it’s therefore important to ensure you partner with event technology vendors with experience hosting large-scale hybrid events.

At 6Connex, Chance believes the most successful hybrid events occur when the client’s customer experience manager partners with the event technology vendor to blur the lines between digital and physical engagement and drive traffic to each other. That’s why he recommends that during the initial event planning stages, we work closely with the customer experience manager to map the end-to-end attendee experience for in-person and virtual participants. Then, we identify “technology touchpoints” in each journey, creating as much overlap as possible.

For example, you can take a hybrid approach to your on-site keynote presentation by live streaming it and hosting a Q&A wherein in-person and virtual audiences submit questions. This allows for greater engagement and audience retention.
When the session concludes, you can schedule a 15-minute break during which the onsite audience travels to their next location and the online audience participates in a virtual treasure hunt. Both groups can then come back together for a 45-minute networking session.

Develop an Appropriate Pricing Model
The Direct Connection team points out that pricing models will be nuanced in a hybrid event format, and event planners will need to determine how the cost of attendance will differ between in-person and virtual attendees. In Chance’s experience, event organizers are often flummoxed by how to price a hybrid event and worry that virtual attendees expect their event to be free. In his opinion, however, the value of any event is in the content and the learning, which means organizers shouldn’t hesitate to price a hybrid event accordingly. We’ve found that once event organizers analyze their event costs and remove the in-person components such as infrastructure and catering, virtual attendance typically prices out at 60% of the cost of in-person attendance.

When planning events, Nevins and Tener stress that managing stakeholders is crucial. Event planners and marketers should therefore identify all parties vested in the event’s success, including attendees, vendors, sponsors, and event staff, and build a framework to effectively manage their contributions— and expectations. This framework should include a role-based outline of tasks, communications plans, and issue escalation protocols. Nevins and Tener also note that a good project management tool can help track tasks and monitor progress against deadlines.

Chance recommends that a kickoff meeting to introduce team members and their roles to the areas of focus is key. This meeting introduces team members and their roles, clarifying responsibilities and establishing authority. Key components include an event overview, defined roles, clear communication channels, decision-making processes, timeline and milestones, available resources, and Q&A sessions. This concise framework ensures clarity, fosters collaboration, and sets the stage for a successful event planning process.

Both the 6Connex and Direct Connection teams stress that hosting frequent team meetings is important to ensure all stakeholders are aligned and promptly address any challenges. In our experience, these meetings should also be used to review resource allocation, including the budget, staff, vendors, and equipment, to ensure you’re maximizing efficiency.

Effective communication will ensure that all stakeholders are aligned, informed, and engaged throughout the event planning process. Nevins and Tener recommend building an event communications plan with a schedule for:

- **Regular Updates:** Establish a schedule for regular updates to keep all stakeholders informed about the progress of the event. This could include milestone updates, important deadlines, and key decisions made.
- **Meetings and Feedback Sessions:** Schedule meetings and feedback sessions to ensure open lines of communication and provide an opportunity for stakeholders to share their thoughts, concerns, and suggestions. These sessions foster collaboration and help address any potential issues promptly.
- **Roles and Responsibilities:** Clearly define the roles and responsibilities of each team member involved in the event planning process. This ensures that everyone knows their specific tasks and areas of ownership, reducing confusion and promoting accountability.

What you get when you include 6Connex, you get more than a trusted partner. Our Customer Experience Managers (CEM) understand the importance of efficient event planning and project management. Our expertise lies in guiding you through the process, ensuring seamless execution and delivering exceptional event experiences from start to finish.

Chance recommends to include the following in your communications plan:

- **Kickoff Meeting:** We begin by facilitating a kickoff meeting to introduce team members and their roles. This session establishes clear lines of communication and provides a comprehensive understanding of each team member’s area of focus. By clarifying responsibilities and establishing a unified vision, we set the stage for effective collaboration throughout the event planning process.
- **KPI Review:** We recognize that events are part of a larger campaign, and it is crucial to align event-specific Key Performance Indicators (KPIs) with the overall campaign objectives. During our engagement, we work closely with you to review and refine the KPIs, ensuring that they are measurable, realistic, and aligned with your desired outcomes. This allows us to track progress, make data-driven decisions, and maximize the success of your events.
- **Attendee and Sponsor Feedback:** Obtaining feedback from attendees and sponsors is essential for evaluating event performance and identifying trends. Our Customer Experience Managers guide you in implementing strategies to gather attendee and sponsor sentiments effectively. By leveraging our event technology solutions, we enable surveys, sentiment analysis, and other feedback mechanisms, providing valuable insights to measure satisfaction levels and identify areas for improvement.

Our dedicated team of Customer Experience Managers combines their expertise in event planning, project management, and technology to streamline the entire process. With our guidance, you can optimize team dynamics, align KPIs with campaign objectives, and leverage data-driven insights to continuously improve your event experiences.
The Direct Connection team works with and advises their clients on how to write a project charter, which formally authorizes the project and provides a project outline, including the scope, deliverables, and goals. The charter also identifies the key stakeholders and gives the project manager authority. In their opinion, writing the project charter helps event planners and marketers think of the event as an "experience" and start to consider the audience, content, location, timing, and strategies for cross-event and cross-channel visibility.

The project charter will then serve as a reference document throughout the event planning process, ensuring everyone is aligned and has full visibility into the event’s purpose, goals, budget, timeline, and role-based deliverables. Importantly, it also ensures that the project stays on track.

Nevins and Tener note that setting and managing a budget is essential in event planning to ensure that all aspects of the event are adequately funded and that the event is financially viable. This includes estimating and categorizing costs, tracking expenditures, and managing financial risks.

The team recommends that event planners and marketers take a detailed approach when creating a budget and account for all potential costs, including venue hire, catering, entertainment, marketing, and contingency costs. They also advise event stakeholders to regularly review and update the budget throughout the event planning process to help avoid overspending and ensure that the event delivers a good return on investment.

Tener encourages event planners and marketers to be conservative when setting a budget, overestimating costs for variable factors such as headcount and underestimating revenues to allow flexibility and scalability and avoid financial shortfalls.

In addition, Chance advises clients to consider selling sponsorship packages (e.g., Platinum, Gold, Silver) with varying investment levels to offset costs. Remember that if your event has virtual components, you can offer promotional opportunities, such as banner ads and video commercials, to draw sponsorship dollars. In our experience, this is where event planners and marketers can get inventive. For example, offer free digital ads to sponsors that purchase a booth. By increasing the value of the sponsorship, you might be able to sell more and pad the revenue line on your budget.

Step 6
Write a Project Charter.

In-person events: 19 weeks out
Virtual events: 12 weeks out

Step 7
Set a Budget.

In-person events: 19 weeks out
Virtual events: 12 weeks out

Step 8
Create an Event Schedule.

In-person events: 18 weeks out
Virtual events: 12 weeks out

Step 9
Organize Tasks and Assign Responsibilities.

In-person events: 18 weeks out
Virtual events: 12 weeks out

To create a schedule for an event, Direct Connection recommends working backward from the event date and plotting all key tasks and milestones, from initial planning and marketing to post-event tasks like feedback collection and event evaluation. The schedule should clearly define how long each task should take and assign a deadline. It should also highlight critical milestones. This schedule should be shared with the entire event planning team and updated regularly.

Assigning tasks with deadlines to specific individuals ensures that each task is completed on time and everyone knows their responsibilities. To avoid confusion, prevent tasks from falling through the cracks, and hit milestones, the Direct Connection team recommends that event planners and marketers leverage project management software such as Monday.com, Clickup, Wrike, or Basecamp. Nevins and Tener have observed that these tools greatly enhance efficiency and collaboration and provide a central platform for the event planning team to manage and access all tasks, deadlines, and documents.

Nevins and Tener also believe it’s best practice to routinely capture and socialize a snapshot of progress against the event planning timeline to ensure everyone is informed and manage event stakeholders’ expectations.
Contingency planning is crucial to preparing for unexpected situations or changes in event management. This will involve conducting a risk assessment to identify potential risks, evaluate their likelihood, and estimate their impact. With this information, event planners and marketers can develop “plan Bs” and outline how these plans will be implemented. Nevins and Tener stress that event vendors such as Direct Connection and 6Connex, as well as health and safety experts, legal advisors, and insurance providers, can be instrumental resources in contingency planning, as they can draw from their experience to quickly identify risks and pose solutions to mitigate them.

When creating a contingency plan, focus on these essential elements:

- **Risk Assessment**: Identify and prioritize potential risks.
  - **In-person Event Example**: Identify the risk of venue unavailability, transportation disruptions, or public health emergencies.
  - **Virtual Event Example**: Recognize the risk of technical glitches, internet connectivity issues, or platform malfunctions.

- **Response Strategies**: Outline actions to mitigate each risk.
  - **In-person Event Example**: Develop backup venue options, establish contingency transportation plans, and establish protocols for emergency situations.
  - **Virtual Event Example**: Ensure technical support availability, and create backup communication channels and power.

- **Resource Allocation**: Determine the necessary resources for plan execution.
  - **In-person Event Example**: Allocate budget for backup venues, transportation arrangements, and additional staffing needs.
  - **Virtual Event Example**: Allocate resources for technical support, backup equipment or software, and ensuring stable internet connectivity.

Communication Plan: Establish clear channels and protocols for effective communication.
- **In-person Event Example**: Define communication procedures to promptly inform attendees, vendors, and staff about venue changes or emergencies.
- **Virtual Event Example**: Set up communication channels to provide real-time support, troubleshoot technical issues, and keep participants informed about any changes or updates.

Timelines and Deadlines: Set realistic timelines for plan implementation.
- **In-person Event Example**: Determine specific deadlines for securing backup venues, confirming transportation arrangements, and updating event materials.
- **Virtual Event Example**: Set timelines for testing virtual platforms, conducting technical rehearsals, and finalizing backup communication plans.

By including these essential components in your contingency plan, you can enhance preparedness, mitigate risks, and effectively respond to unexpected events, ensuring the smooth continuation of your project, event, or operation.
Step 13
Lead & Motivate Your Event Team.

In-person events: 15 weeks out
Virtual events: 12 weeks out

Nevins and Tener underscore that although project and customer experience managers are critical in event planning, event management is more than a 2-person project. The team advises companies to take a “positive and inclusive” approach to managing an event planning team and notes that involving the entire event planning team in the planning process will help all participants feel engaged and take ownership of the event. Recommended tactics for creating enthusiasm and accountability include communicating consistently, setting realistic goals, scheduling regular team meetings, inviting team members to participate in decision-making, and holding brainstorming sessions where team members can contribute their ideas and expertise.

Nevins and Tener also note that by including the extended team in planning, team members have more opportunities to learn and improve their skills, which often increases overall job satisfaction. For example, a customer experience manager might have insights into how to structure the agenda, increase participation in networking, or design the site flow to improve attendee engagement. By including everyone at these decision points, your events team can receive a “master class” in event enhancements.

The Direct Connection team also encourages clients to practice consistent appreciation and acknowledgment to help motivate the event planning team. This can take the form of regular feedback, recognition of good work, and rewards or incentives for outstanding performance.

Step 14
Anticipate In-Event Changes.

In-person events: 14 weeks out
Virtual events: 1 week out

According to the Direct Connection team, event planners and marketers should be prepared to pivot in-event. In their experience, it’s common to make changes as the event unfolds to improve the attendee event experience or get the first impression right. Nevins and Tener, therefore, advise event planners and marketers to be ready to be flexible, make quick decisions, and rely on their communication plan to manage changes without disrupting the event.

Both experts note that to minimize reaction time and avoid confusion, it’s important to have an in-event change management process outlined and for everyone to know who the decision-makers are before the event and guidelines for when to seek approval.

Project managers should schedule regular check-ins with the event planning team to ensure everything is done correctly and address any issues or concerns. These check-ins can take the form of daily team meetings, a shared communication thread in a project management tool or Slack, or designated “office hours,” where team members can congregate online at a pre-scheduled time to discuss challenges and ask decision-makers to answer questions.

The Direct Connection team also points out that check-ins aren’t just a pre-event task. Project managers should also schedule a time to connect with the team during the event so everyone understands what’s happening at different attendee touchpoints and what needs to be done to ensure overall success. This, too, can take the form of team meetings or a dedicated Slack channel, although Nevins and Tener note that apps such as Slack are great tools for communication.

Nevins and Tener also encourage clients to build a “run of show” which provides a clear outline of what should happen at each stage of the event and helps ensure everyone is on the same page. In their experience, a “run of show” can help avoid confusion, smooth transitions between different parts of the event, and ensure all team members know their roles and responsibilities at each stage.

6Connex Tip:
In addition to tools like Slack, Eventory by 6Connex provides a comprehensive solution for project managers and event organizers to facilitate effective communication and collaboration during an event. With Eventory, project managers can schedule dedicated team meetings within the platform to connect with their team members and ensure everyone is on the same page regarding attendee touchpoints and event progress.

Eventory offers a user-friendly interface that allows project managers to easily coordinate tasks, delegate responsibilities, and monitor the status of different event components. By utilizing Eventory’s features, project managers can streamline communication and keep the entire team informed about the latest updates and requirements.

One notable advantage of using Eventory is its ability to centralize all event-related information and discussions in one place. Instead of relying on multiple communication channels, such as emails, instant messaging apps, and project management tools separately, Eventory offers a unified platform that keeps all conversations and updates organized. This ensures that important information doesn’t get lost in the shuffle and enables project managers to quickly reference past discussions and decisions.

Furthermore, Eventory provides real-time analytics and reporting capabilities, allowing project managers to gain valuable insights into attendee engagement, feedback, and overall event performance. These insights can inform decision-making during the event and guide future event planning, helping to maximize the success of each event.

By utilizing Eventory’s robust communication and collaboration features, project managers can effectively engage with their team members, foster a sense of cohesion and shared purpose, and ultimately contribute to the overall success of the event.

Step 15
Check in With Your Team.

In-person events: 14 weeks out
Virtual events: 1 week out

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By utilizing Eventory’s robust communication and collaboration features, project managers can effectively engage with their team members, foster a sense of cohesion and shared purpose, and ultimately contribute to the overall success of the event.
In today’s world, incorporating sustainable practices into events has become a priority for many event planners. By implementing eco-friendly strategies, such as reducing paper usage, promoting recycling, selecting sustainable vendors and venues, sourcing local food and drink, and offsetting carbon emissions, event planners can contribute to a healthier environment while enhancing their event’s reputation and appeal to eco-conscious attendees. Additionally, these practices can often lead to cost savings.

When it comes to virtual events, both Direct Connection and 6Connex emphasize the abundance of innovative and practical ways to integrate sustainability. For instance, for virtual and hybrid events with fewer onsite attendees, opting for digital agendas and guide information through platforms like Eventory by 6Connex or Immersive MyAgenda can eliminate the need for printed materials. Furthermore, in gamified events, rewarding winners with digital gift cards instead of physical items can reduce the environmental impact. Every small effort counts!

For example, 6Connex hosted a virtual event for a leading medical organization in Washington, D.C. The event serves as an exemplary case of embracing sustainability through virtual events. They made a transition from a 1 day in-person event that would have flown over 9,000 attendees globally to a virtual format. This resulted in a remarkable ~36 times reduction in emissions compared to a traditional in-person event. By hosting their event virtually, they entirely avoided carbon emissions related to transportation and event space. This outstanding achievement demonstrates the significant positive impact that virtual events can have on the environment.

By following their lead and implementing sustainable practices, event planners can contribute to a greener future while delivering exceptional experiences for their attendees. Whether it’s reducing waste, choosing eco-friendly options, or offsetting carbon emissions, incorporating sustainability into event planning is a win-win situation for both the environment and the event’s success. Read the full sustainability report here.

In today’s dynamic event landscape, technology plays a crucial role in revolutionizing the attendee experience, streamlining event planning processes, and unlocking valuable insights for event planners and marketers. From virtual reality to mobile event apps, the right event technology can make a significant difference.

We’ll explore key considerations and expert advice from Chance on selecting the right event technology to ensure success in any scenario below:

**Revolutionize Your Events: Embrace Versatile Technology for Any Scenario**

The right event technology will support in-person, virtual, and hybrid events. Remember that event disruptions can come in any form and at any time. Recently, we experienced a pandemic. Twelve months from now, it could be a weather event. Three years from now, it could be an economic event. You need to have a long-term event strategy that accommodates different scenarios, and investing in event technology that supports events in any format will be critical.

**Unlock Event Success: Essential Tech Features and Beyond**

At a minimum, technology “must-haves” are ease of use for attendees, fast implementation time, multi-language features for global events, and reporting for ROI measurement. Remember, though, that there’s a lot of “nice to have” functionality outside of these basics that will enhance the entire event, deliver better event value, and help you utilize event data more effectively. For example, advanced platforms will have AI capabilities that allow you to leverage your registration and behavior information to recommend activities, content, contacts, etc., to each attendee before and throughout the event, sending push notifications and personalizing the event experience to increase engagement.

Chance suggests utilizing 6Connex’s AI Matchmaking. Our matchmaking system utilizes advanced algorithms to gain insights from the audience’s virtual venue interactions, enabling precise content and networking recommendations. By analyzing meeting room visits, content views, and interactions during live sessions, the AI system determines optimal matches.

**Step 16**

**Consider Sustainability.**

- **In-person events:** 13 weeks out
- **Virtual events:** 12 weeks out

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**Step 17**

**Select the Right Event Technology.**

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- **Virtual events:** 12 weeks out

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- **Virtual events:** 12 weeks out

In today’s world, incorporating sustainable practices into events has become a priority for many event planners. By implementing eco-friendly strategies, such as reducing paper usage, promoting recycling, selecting sustainable vendors and venues, sourcing local food and drink, and offsetting carbon emissions, event planners can contribute to a healthier environment while enhancing their event’s reputation and appeal to eco-conscious attendees. Additionally, these practices can often lead to cost savings.

When it comes to virtual events, both Direct Connection and 6Connex emphasize the abundance of innovative and practical ways to integrate sustainability. For instance, for virtual and hybrid events with fewer onsite attendees, opting for digital agendas and guide information through platforms like Eventory by 6Connex or Immersive MyAgenda can eliminate the need for printed materials. Furthermore, in gamified events, rewarding winners with digital gift cards instead of physical items can reduce the environmental impact. Every small effort counts!

For example, 6Connex hosted a virtual event for a leading medical organization in Washington, D.C. The event serves as an exemplary case of embracing sustainability through virtual events. They made a transition from a 1 day in-person event that would have flown over 9,000 attendees globally to a virtual format. This resulted in a remarkable ~36 times reduction in emissions compared to a traditional in-person event. By hosting their event virtually, they entirely avoided carbon emissions related to transportation and event space. This outstanding achievement demonstrates the significant positive impact that virtual events can have on the environment.

By following their lead and implementing sustainable practices, event planners can contribute to a greener future while delivering exceptional experiences for their attendees. Whether it’s reducing waste, choosing eco-friendly options, or offsetting carbon emissions, incorporating sustainability into event planning is a win-win situation for both the environment and the event’s success. Read the full sustainability report here.

In today’s dynamic event landscape, technology plays a crucial role in revolutionizing the attendee experience, streamlining event planning processes, and unlocking valuable insights for event planners and marketers. From virtual reality to mobile event apps, the right event technology can make a significant difference.

We’ll explore key considerations and expert advice from Chance on selecting the right event technology to ensure success in any scenario below:

**Revolutionize Your Events: Embrace Versatile Technology for Any Scenario**

The right event technology will support in-person, virtual, and hybrid events. Remember that event disruptions can come in any form and at any time. Recently, we experienced a pandemic. Twelve months from now, it could be a weather event. Three years from now, it could be an economic event. You need to have a long-term event strategy that accommodates different scenarios, and investing in event technology that supports events in any format will be critical.

**Unlock Event Success: Essential Tech Features and Beyond**

At a minimum, technology “must-haves” are ease of use for attendees, fast implementation time, multi-language features for global events, and reporting for ROI measurement. Remember, though, that there’s a lot of “nice to have” functionality outside of these basics that will enhance the entire event, deliver better event value, and help you utilize event data more effectively. For example, advanced platforms will have AI capabilities that allow you to leverage your registration and behavior information to recommend activities, content, contacts, etc., to each attendee before and throughout the event, sending push notifications and personalizing the event experience to increase engagement.

Chance suggests utilizing 6Connex’s AI Matchmaking. Our matchmaking system utilizes advanced algorithms to gain insights from the audience’s virtual venue interactions, enabling precise content and networking recommendations. By analyzing meeting room visits, content views, and interactions during live sessions, the AI system determines optimal matches.

**Step 16**

**Consider Sustainability.**

- **In-person events:** 13 weeks out
- **Virtual events:** 12 weeks out

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Another great feature that Chance mentions to take your tech feature a step further is 6Connex Content Hub, a groundbreaking feature that revolutionizes the virtual event experience with AI-powered content suggestions.

Through intelligent data analysis, the Content Hub delivers personalized recommendations based on attendee interests and activities. This not only enhances attendee engagement but also provides valuable insights for organizers and sponsors.

Key features of the Content Hub include custom content suggestions influenced by registration criteria and attendee activity, immediate event influence through custom registration questions, and focused recommendations based on preference tags. Attendees can easily access content from the navigation bar, customize their recommendations, and enjoy fresh, dynamic content that updates regularly.

With the 6Connex Content Hub, attendees stay engaged, organizers gain actionable data, and the virtual event experience reaches new levels of personalization and excitement.

Cutting-Edge Event Technology: Seamless, Scalable, and Accessible
Most importantly, the technology must be rock solid, hosted in the cloud to manage scale, and built with HTML5 for accessibility on any browser and device. It’s also wise to consider how easily the platform integrates with other applications. Ideally, you want a technology-agnostic platform, meaning you can integrate the tools you use daily with the technology and take advantage of the solution provider’s technology partners, such as virtual photo booths, captioning, social media walls, etc. Seamless integrations will empower you to provide attendees with an almost endless array of flexibility and choice.

Shield Your Events: Robust Security Measures for Data Protection
Ensuring the security of your virtual or hybrid event is of utmost importance, and it’s essential to choose a technology provider that prioritizes data protection. When evaluating potential providers, consider the expertise of 6Connex’s technology teams, who are well-versed in designing and developing secure virtual environments.

Your technology provider should be able to demonstrate their commitment to security by strictly adhering to GDPR regulations, providing reassurance that your event will meet the necessary compliance standards. At 6Connex, a notable achievement is their ISO 27001 certification, obtained in 2017. This certification highlights our dedication to implementing internationally recognized processes and best practices in infrastructure and security management.

Look for a technology provider that emphasizes essential security measures such as end-to-end encryption and avoids requiring hosts or attendees to install local applications. By partnering with a reputable provider like 6Connex, you can trust that your attendee information and event data will be safeguarded with the utmost care and attention to security.

Beyond Technology: Collaborate with Event Consultants for Optimal Results
Choose an event technology provider that isn’t just providing technology but also consulting on planning events. Knowing the attendee information and event data will be safeguarded with the utmost care and attention to security.

Step 18: Plan to Wrap up Your Event.

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Beyond Technology: Collaborate with Event Consultants for Optimal Results
Choose an event technology provider that isn’t just providing technology but also consulting on planning events. Knowing the possibilities is essential, and the right provider will have real ideas on optimizing the technology’s features and functionality to meet your goals.

According to Nevins and Tener, it’s as essential to plan for event wrap-up as it is to plan for event execution. A comprehensive wrap-up plan ensures everything is complete, reconciles all event finances, and acknowledges the team’s efforts. Tasks in your wrap-up plan, such as reviewing event data and attendee feedback, will help you prove the event’s impact and improve future event plans. The Direct Connection team advises clients to hold a post-event review within a week after the event ends, wherein all participants reflect on the event and identify what went well and what could be improved.

Step 19: Solicit Feedback.

Gathering and analyzing post-event feedback is crucial to measure the event’s success, understand attendees’ experiences, and identify areas for improvement for future events. This can take the form of surveys, feedback forms, social media monitoring, and data analysis to glean valuable insights for improving future events and demonstrating the event’s success to stakeholders.

If you leverage event technology, you can easily track detailed attendee activity and generate reports on the booths they’ve visited, sessions they’ve attended, and people with whom they’ve networked. In addition to assessing your event’s performance against the specific KPIs you set at the onset of the event planning process. According to Chance, he recommends that event planners and marketers also consider using the following data to evaluate the event:

- Registrations: the number of people who registered for the event
- Session attendance: the number of people who attended a specific session
- Demographic information: data such as location, age, and gender to help you better understand your audience
- Speaker engagement: number of speaker profile views
- Speaker and session engagement via live polling: measure attendee engagement during specific sessions and identify the popular speaker(s)
- Session feedback and ratings: data such as attendee satisfaction, content relevance, speaker performance, etc.
- Qualified sales leads: number of customer prospects generated by the event

In-person events: 2 weeks out
Virtual events: 1 week out

In-person events: post-event
Virtual events: post-event

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Virtual events: 1 week out

In-person events: post-event
Virtual events: post-event
● Connections: data such as the number of people who attended networking events, exchanged contact information at networking events, set up 1:1 in-event meetings, engaged in 1:1 chats online, etc.

● Attendee Surveys: data regarding attendee satisfaction

● Sponsorship Engagement: attendee-sponsorship engagement, such as booth visits

Remember that intelligent reporting may capture attendee activities but not necessarily their feelings about the event. Therefore, launch a short survey to capture this information within 1–2 weeks after the event date. Keep the survey friendly and to the point. Create a separate survey for event sponsors or exhibitors. Consider including the survey in a thank you email for even better results.

Don't Forget to Debrief!

A gentle reminder to not overlook your marketing and event planning teams! Give everyone a few days to recover after the event, and 3–7 days, and then schedule a post-event debrief to discuss what went right and what could have been better. This will not only bring the team together but also ensure that you can correct mistakes and make improvements next time.

This meeting should include feedback from all relevant parties, such as the event director, managers, marketing leads, sales and customer leads, on-site or virtual leads, designers, IT lead, executive leadership, the event marketing team, logistics staff, the sponsorship partnership team, the tech and A/V team, and the finance team.

During the debriefing, review the initial event objectives and goals and analyze their outcomes, measure success, and find opportunities for improvement. Ask plenty of questions about various aspects of the event, such as gifting, food and beverage, venue, and technology.

Step 20

Update Your Event Campaign Strategy.

In-person events: between events

Virtual events: between events

Nevins and Tener stress that event planning is not a ‘set it and forget it’ activity. Instead, it’s essential to identify trends that can bring about greater awareness and success for your next event. They recommend that event planners and marketers compare the KPIs of several event results over time, as larger data sets will enable you and your expanded network of vendors, sponsors, and onsite facility venues to identify overarching trends and leverage them to amplify future success.

Chance recommends that you share the trends with your CEM and/or technology provider to discuss and explore ways to utilize technology further to enhance your event planning and delivery strategy.

Event Success is One Project Plan Away with 6Connex

Although events require a well-thought-out strategy and project plan, the payoff can be huge. But how can you ensure that your events reach their full potential?

That’s where 6Connex comes in. As a leading provider of cutting-edge event technology solutions, 6Connex has helped countless event planners and marketers create exceptional experiences that leave a lasting impact.

By partnering with 6Connex, you gain access to a comprehensive suite of event tools and features designed to elevate your events to new heights. From seamless virtual and hybrid event platforms to advanced analytics and personalized attendee experiences, we offer the solutions you need to unlock the true potential of your events.

Remember, the success of your events is just one project plan away. Don’t miss out on the opportunity to create extraordinary events that captivate audiences, drive meaningful connections, and generate long-term growth. Schedule your consultation with us here and let our expertise and cutting-edge technology propel your events to new heights. The time for exceptional, streamlined events is now.

Get a full timeline and download our interactive planning sheet on the next page!
**Timeline for Planning In-Person and Virtual Events**

**Customer Experience Manager: Strategy & Measuring Trends**
- Kickoff meeting - introduction to team members and their roles and areas of focus
- Review KPIs for event and larger campaign
- Define strategies to obtain attendee and sponsor sentiments
- Share recommendations for promotional plan to attendees
- Discuss best practices for agenda structure
- Review unique benefits of live, simulcast, on-demand types of webcasting and capturing audience feedback via webinar polling and post-webinar survey
- Provide site recommendations including solution design of features to ensure attendee adoption of key activities (booth chat, networking, and content engagement)
- Review any certification strategy requirements by client organization and determine ideal delivery in webinars and in the virtual experience for optimization and efficient tracking
- Provide recommendations around leadership/gamification/measure KPIs to encourage further engagement
- Ideation of introduction video script / messaging to welcome the attendee and position the event experience to drive further adoption of engagement and networking activities
- If the event is onsite or hybrid, review key facility logistics to determine best practices for onsite attendee check-in process, onsite booth QR code scanning and more
- Review setup of role-based access now that the experience is created and determine if any adjustments in strategy of which users access room and content can be needed
- Check-in on promotional plan and use of OTT/TV promos to determine any adjustment in marketing recommendations
- Review any top sales leads and update的事实
- Checkout meeting - allow for analytics review of event performance
- Review KPIs if all KPIs were achieved
- Review strategies, sponsor, and host sentiments - what is the feedback?
- Attendee engagement scoring allows for capturing next steps determined for quarterly connect meetings to maintain on-demand event engagement and review trends for next events

**Project Manager: Logistics & Delivery**
- Kickoff meeting
- Deliverables spreadsheet
- Reg & Email copy
- Review registration and login items
- Reg Log in Items due
- Upload LT/Login page/Registration
- Share Analytics dashboard with Client
- Test Reg/Page/Login page
- Launch Registration page
- Design platform pages
- Complete additional assets
- Send Registration update
- Platform Design Due
- Booth Staff Names Due
- Build Out Environment
- Schedule Check-in Call with client for next week
- Check-in call
- Schedule Live webinar tech check
- Build out environment
- All booth assets due
- Leadership rules/policies due
- Reminder email content due
- Pre-record webinar items due
- Build out environment/bios/initial testing
- Schedule environment walls through for next week
- Send Registration update
- Walkthrough Environment with Client
- Environment Lock down
- Environment Testing and Adjustments
- Live Webinar tech check
- Booth staff access/testing
- Send Registration update
- Debrief meeting
- On-demand reporting