EVENT GARDE

June 2026 White Paper

YOUR EVENT LOOKS FINE ON PAPER. A SECRET SHOPPER MIGHT DISAGREE.

What Your Post-Event Survey Can't Tell You:

The Case for Real-Time Event Analysis

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EXECUTIVE SUMMARY

Most associations evaluate their events the same way: post-event surveys, revenue reports, and informal feedback. These tools are familiar, affordable, and useful—but they measure a narrow band of what actually determines whether an event is healthy, strategically aligned, and positioned for the future.

This white paper introduces a five-layer framework for comprehensive event analysis that moves beyond satisfaction scores to strategic clarity. Drawing on Event Garde's experience conducting structured event analyses across healthcare, education, association management, government, nonprofit, and legal sectors, it demonstrates how real-time observation—when integrated with historical data, experience surveys, and stakeholder interviews—reveals patterns that traditional evaluation methods routinely miss. No client organizations are named in this white paper, but all examples are drawn from real engagements and presented generically to protect confidentiality. The five layers of the framework are:

- **HISTORICAL DATA REVIEW:** Establishing the baseline
- **STRUCTURED EVENT OBSERVATION:** Seeing the system in motion
- **EXPERIENCE SURVEYS:** Quantifying perception intentionally
- **STAKEHOLDER INTERVIEWS:** Surfacing hidden tensions
- **INTERPRETATION & STRATEGIC RECOMMENDATIONS:** Moving from insight to action

The argument is not that your event is broken. The argument is that even when your event is working—maybe especially when it's working—you are likely missing the signals that tell you where it's heading. Satisfaction surveys will tell you people liked it. They will not tell you that your closing session drew a quarter of registered attendees, that your sponsors are quietly questioning return on investment, that your exhibit hall clears out by noon on the final day, or that your staff are operating on heroics rather than systems.

For CEOs, executive directors, and other senior leaders, this approach supports confident, evidence-based decisions about investment, duration, governance scheduling, sponsor and exhibitor strategy, and venue commitments. For meeting professionals, it provides strategic partnership and a neutral outside perspective—particularly in environments where internal dynamics or capacity constraints limit candid reflection.

**Because the question is not whether your event is "good."
The question is whether it is intentionally designed for the future.**

THE CONFIDENCE GAP

Your event looks successful.

Registration met projections. Sponsors renewed.

Post-event surveys averaged 4.3 out of 5. The board congratulated staff on another strong conference. By every conventional measure, the event delivered.

And yet, something doesn't quite add up. Energy fluctuated unpredictably across the program. Some sessions were packed to standing room; others were a third full. Sponsors renewed but asked fewer questions about next year's packages—a silence that might signal comfort or might signal disengagement. Exhibitors packed up early on the final day. The closing session drew barely a quarter of registered attendees. Staff left exhausted in ways that felt structural, not incidental.

These signals are easy to dismiss. They don't show up in satisfaction scores. They don't appear in financial summaries. They rarely surface in board reports. But they represent something important: the gap between what your evaluation tools are designed to measure and what is actually happening inside your event.

> **Most associations evaluate events by asking people what they thought afterward. Very few invest in understanding what's actually happening in real time. The gap between perception and reality is where the most consequential insights live.**

The standard evaluation toolkit—post-event surveys, revenue reports, anecdotal feedback, and the reassuring absence of complaints—is not wrong. These tools measure real things. But they measure a narrow band of real things, and they do so after the fact, filtered through memory, social desirability, and the natural human tendency to recall peaks and valleys while forgetting the long middle.

Consider what a typical post-event survey measures well: speaker quality ratings, content relevance, food and beverage satisfaction, overall experience scores, and likelihood to recommend to a friend or colleague. These are useful data points. Now consider what the same survey almost never measures: whether attendee flow patterns maximized or undermined sponsor and exhibitor exposure; whether governance meetings drew leaders away from key educational programming; whether room assignments aligned with actual demand; whether the schedule rhythm supported sustained energy and connection; whether new attendees felt oriented or adrift; whether staff workload was structurally sustainable or simply held together by goodwill.

Surveys measure perception. They do not measure system performance. Even the most thoughtfully designed post-event survey typically operates at what the Kirkpatrick Model of Training Evaluation would call Level 1: Reaction—how participants felt about the experience. It rarely reaches Level 2 (whether they learned something), let alone Level 3 (whether they changed their behavior as a result) or Level 4 (whether the event produced measurable organizational outcomes for attendees).

And beyond the individual learning question entirely, surveys are structurally unable to assess how the event functions as a system—the interconnected dynamics of flow, design, rhythm, governance structure, sponsor and exhibitor integration, spatial relationships, and behavioral patterns that collectively determine whether the event is advancing the organization's mission or simply running on momentum.

THE SURVEY FATIGUE FACTOR

There is also a growing structural problem with the survey instrument itself. Response rates for post-event surveys have been declining across the association sector for years, and many organizations now base their evaluation on feedback from a small fraction of attendees—sometimes fewer than 15 percent of those who registered. The respondents who do complete surveys tend to skew toward those who are either highly satisfied or highly dissatisfied, while the quieter majority—the attendees whose experience was fine but unremarkable, or who have concerns they don't feel strongly enough to articulate—remains unheard.

This is not a minor methodological limitation. When an organization bases its strategic decisions about a flagship event on the perceptions of a self-selected subset that may represent one in ten attendees, it is building its future on a foundation that was never designed to bear that weight. Survey data remains valuable, but it must be understood for what it is: one input among several, not the definitive word.

THE COMFORT OF *Financial Success*

Financial performance is perhaps the most reassuring—and most misleading—indicator of event health. An event that generates strong revenue is almost always assumed to be a healthy event. Leadership celebrates the margin. The board moves on to other agenda items.

But revenue concentration, cost escalation, sponsor and exhibitor dependency, and operational strain can create real fragility beneath a profitable surface. In one national association, sponsorship accounted for more than half of total event income—a strength when those relationships held, but a concentration risk that would only become visible if a major partner withdrew. Registration revenue was stable, yet exhibitor income fluctuated significantly year to year based on how much internal staff attention the exhibitor program received. The topline looked healthy. The underlying structure was more brittle than anyone realized.

Without the kind of cross-analysis that layers historical financial data alongside real-time observation and candid stakeholder conversations, these patterns tend to remain invisible until disruption forces them into view.

THE SILENCE PROBLEM

Many associations evaluate success informally through the absence of negative signals. No one complained. The board was pleased. We didn't hear anything negative. But silence is not the same as alignment, and the absence of complaints is not evidence of satisfaction. It is evidence that no one complained.

In practice, attendees adapt quietly. They skip sessions that feel stale. They avoid exhibit areas that are inconvenient to reach. They attend every other year instead of annually when the content feels overly familiar. They network in hallways and hotel lobbies rather than through structured programming. They leave a day early. They participate in what might be called the shadow conference—the informal gathering that happens in hotel lobbies, nearby restaurants, and side meetings, where the real conversations take place without anyone registering or scanning a badge. These are behavioral signals with strategic implications, and they are invisible to every evaluation tool that relies on asking people to report what they thought rather than observing what they did.

THE POST-PANDEMIC *Reckoning*

Underlying all of these evaluation gaps is a more fundamental shift that many associations have yet to fully absorb. The pandemic did not just interrupt in-person events—it permanently changed how people evaluate whether attending one is worth the investment. Time away from family, the frustrations and expense of travel, the opportunity cost of days away from work, the cognitive load of a multi-day program—these tradeoffs existed before 2020, but they were largely invisible because attendance was habitual. People attended because they always had.

That automaticity is gone. Attendees are making deliberate, cost-conscious decisions about which events justify their time and resources. They are more selective, more discerning, and less forgiving of experiences that don't deliver clear, differentiated value. Organizations that have always planned three-, four-, or even five-day events may find that their event footprint no longer matches the expectations of the people they most need to reach. The question is no longer simply whether the event was good. The question is whether it was worth the trip—and whether it will be worth the trip again next year.

This white paper makes a case for a different approach to answering that question—one that doesn't replace surveys or financial reports but layers structured, real-time observation on top of them. The argument is not that your event is broken. The argument is that even when your event is working—maybe especially when it's working—you are likely missing the signals that tell you where it's heading.

WHAT HAPPENS WHEN YOU ACTUALLY LOOK

The term *secret shopping* lands differently for a reason. It implies objectivity, firsthand experience, and a willingness to see what insiders might not.

In the association event context, however, it requires some reframing. Structured event observation is not a gotcha exercise designed to expose mistakes. It is not a critique of individual staff members. It is not a mystery-diner scorecard. It is a disciplined, neutral, real-time analysis conducted by an experienced meeting strategist who is immersed in the full attendee journey—from the moment they park, valet, or Uber to the moment they walk out of the closing session.

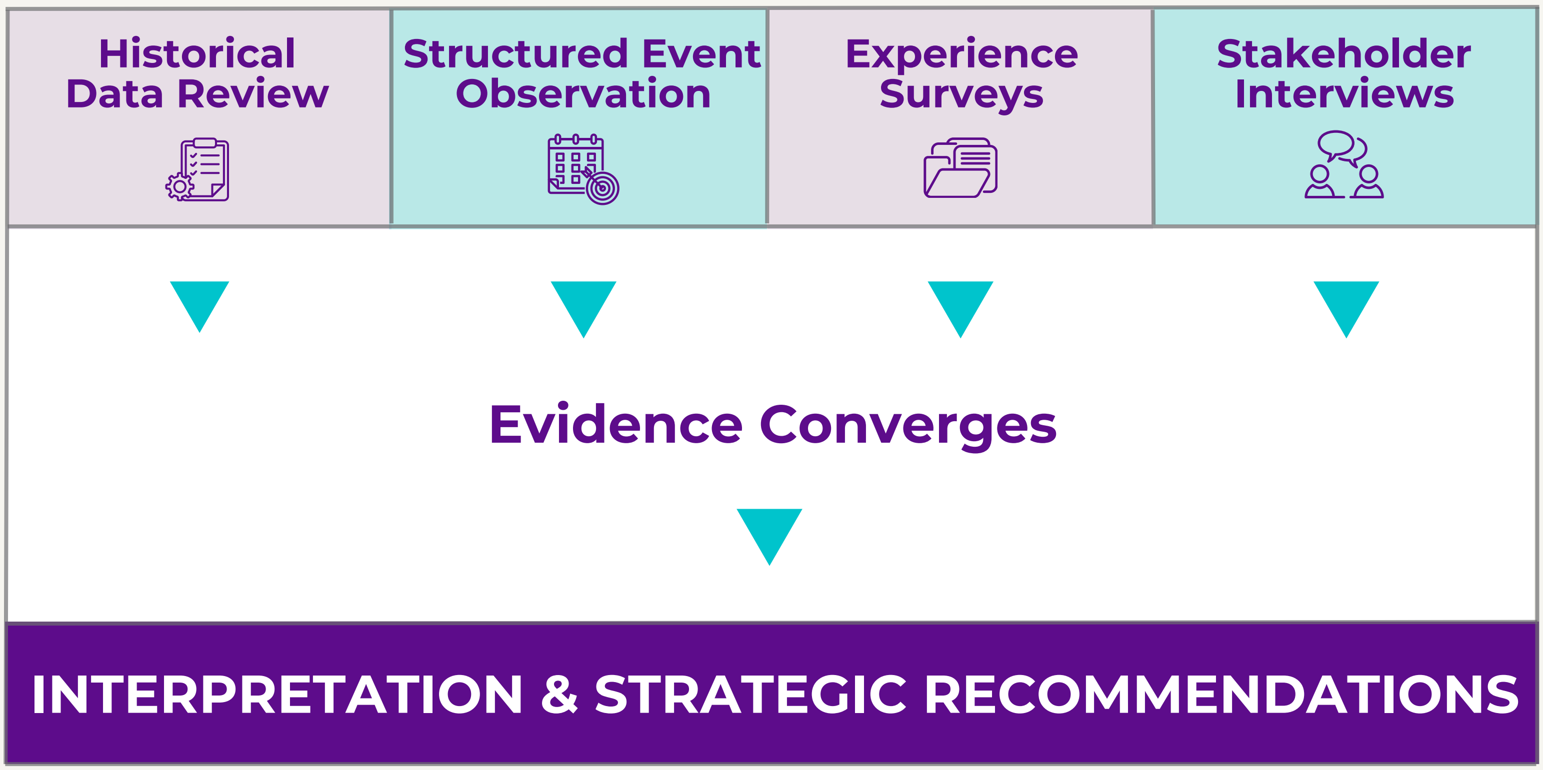
What makes this approach different from simply attending your own event is twofold: independence and methodology. An outside observer is not responsible for event logistics, not embedded in internal politics, not hosting VIP meetings during breakouts, and not responding to hotel group chats while trying to assess whether the exhibit hall traffic pattern is serving exhibitor and sponsor needs. They are free to watch, move, count, time, and notice—with a structured framework for organizing what they see into patterns that connect back to strategic questions.

But observation alone is incomplete. A trained observer can tell you that 148 people attended the closing session out of 654 registered, or that the wellness room was an empty space with bright lights and no restorative features, or that a keynote speaker made an insensitive joke to an audience whose lived experience made it land very differently than intended. These are important data points. They become strategic insights only when they are layered with other forms of evidence.

FIVE LAYERS OF EVIDENCE

Event Garde's comprehensive event analysis integrates five distinct layers of evidence. Each layer reveals something the others cannot, and the methodology's power comes from their convergence—the moment when historical trends, observed behavior, survey responses, and stakeholder candor all point toward the same conclusion.

THE FIVE-LAYER EVENT ANALYSIS FRAMEWORK



> **Strategic clarity emerges when multiple evidence streams converge.**

LAYER 1: HISTORICAL DATA REVIEW

Before anyone sets foot onsite, the analysis begins with multi-year data. Attendance trends, registration mix, comped registration percentages, revenue by source, expense trajectories, continuing education (CE) uptake, room-block performance, speaker submission patterns, audience segmentation shifts—these data points create the baseline against which everything else is interpreted.

Historical data answers foundational questions. Is attendance growing, plateauing, or eroding? Is the revenue mix diversified or concentrated? Are certain audience segments growing while others decline? Has the event's duration remained constant while participation patterns have shifted? How have sponsor and exhibitor programs performed relative to each other—and relative to the staff attention each receives? In many organizations, this data exists but has never been consolidated, compared across years, or used to inform forward-looking decisions. The act of assembling it often produces the first surprises.

In one national association, consolidating data back several years for the first time revealed that one core audience segment—historically a substantial share of attendees—had been declining steadily, even as overall registration held relatively stable. That single finding reframed the entire conversation about content strategy and audience development. It had been happening in plain sight for years, yet no one had noticed.

LAYER 2:
STRUCTURED EVENT OBSERVATION

This is the layer most people associate with "secret shopping," and it is the one that most reliably surfaces findings that other methods miss. An experienced observer embeds in the event and documents what happens across multiple domains, including but not limited to: arrival experience and first impressions, registration flow and wayfinding, session engagement and content delivery, sponsor and exhibitor integration, food and beverage operations, mobile app functionality, special events and networking design, and the informal behavioral patterns that reveal how attendees actually use the event versus how planners intended them to.

WHAT OBSERVATION REVEALS THAT SURVEYS CANNOT IS SIMULTANEITY AND SEQUENCE–THE WAY ONE ELEMENT AFFECTS ANOTHER.

The Hidden Flow of Events

Consider a common layout: breakfast buffets are set up in the pre-function space alongside sponsor and exhibitor tables, and attendees carry their plates into the adjacent ballroom for the opening general session. In theory, this design drives foot traffic directly past exhibits during the highest-energy window of the day. In practice, observation revealed that most attendees moved quickly from buffet to ballroom without pausing—they were focused on finding seats and settling in before the program began. The exhibits became a passageway rather than a destination. By the time the general session ended and attendees re-entered the pre-function space, the breakfast stations had been cleared, breakout sessions scattered throughout the convention center were starting in 15 minutes, and the natural reason to linger had disappeared. Sponsors and exhibitors experienced what should have been their strongest hour of traffic as two brief surges of people walking past rather than stopping—a pattern that no post-event survey may surface, because from the attendee's perspective, the breakfast was “fine” and the exhibits were “right there.”

Similarly, a 60-minute breakout session may be well-received by attendees, but when the speaker runs even five minutes long, it compresses the transition break. The next session starts late. Q&A gets cut. Attendees who wanted to ask questions cluster in hallways instead, missing the opening of whatever comes next. Exhibitors and sponsors in the pre-function area lose what should have been a 15-minute window of foot traffic. Meanwhile, the pattern repeats across four or five concurrent sessions, and by mid-afternoon the cumulative drift has reshaped the rhythm of the entire day. Surveys will tell you the session was a 4.5 out of 5. Observation will tell you the schedule lost its coherence by 2 p.m.—and explain why.

These patterns are vivid in the moment but difficult to reconstruct from memory alone.

Structured observation is also supported by selective photography throughout the event. During the analysis, the observer takes candid, unobtrusive photos using a smartphone—typically one or two at each session, event, or key touchpoint—to document room setups, signage, exhibit layouts, food and beverage placement, crowd density, wayfinding gaps, AV, and other environmental details that narrative alone cannot fully convey. These images are not intended to identify or evaluate individuals; they serve as visual evidence that grounds the written findings in concrete, observable reality. From the photos taken across the full event, a curated selection is incorporated into the final report to illustrate specific patterns and recommendations—transforming abstract observations into something leadership can see for themselves.

LAYER 3:
EXPERIENCE SURVEYS

Surveys remain important, but they function best when they are intentionally designed and triangulated with other evidence. Effective event surveys segment respondents—attendees, exhibitors, sponsors, speakers, and volunteers—because each experience the event differently and should be asked targeted questions. They measure likelihood to return, perceived value relative to cost, and the specific elements that drove satisfaction or frustration.

What surveys do well is quantify perception at scale. What they struggle to do—even when they include open-ended questions—is explain why. Qualitative survey responses can surface useful themes, but they are still filtered through memory, shaped by what respondents think is worth mentioning, and limited by the questions that were asked. When 89 percent of attendees rate the event four or five stars but only 63 percent say they'll attend next year, the gap between satisfaction and commitment contains a story that the survey itself cannot fully tell.

OBSERVATION AND INTERVIEWS SURFACE WHAT SURVEYS CAN'T: THE PATTERNS PEOPLE EXPERIENCE BUT DON'T THINK TO REPORT.

LAYER 4: STAKEHOLDER INTERVIEWS

Short, targeted interviews with board members, staff, sponsors, exhibitors, speakers, and volunteers surface the qualitative insights that data and observation cannot fully provide. Stakeholders reveal motivations, frustrations, unspoken concerns, and the organizational dynamics that shape event decisions in ways that are not visible from the outside.

In recent analyses, recurring themes across stakeholder interviews have included variations of the same essential tensions: the event is trying to do too much; no one can agree on what it's actually for; sponsorship and exhibitor deliverables feel undefined; education is strong but engagement feels fragmented; and the most telling phrase of all, heard in virtually every association—“we’ve always done it this way.” These are not complaints. They are diagnostic signals. Many leaders already sense this misalignment.

THEY SIMPLY LACK THE NEUTRAL EVIDENCE TO CONFIRM WHAT THEY ALREADY SUSPECT.

LAYER 5: INTERPRETATION AND STRATEGIC RECOMMENDATIONS

Data alone does not create change.

Observation alone does not create direction.

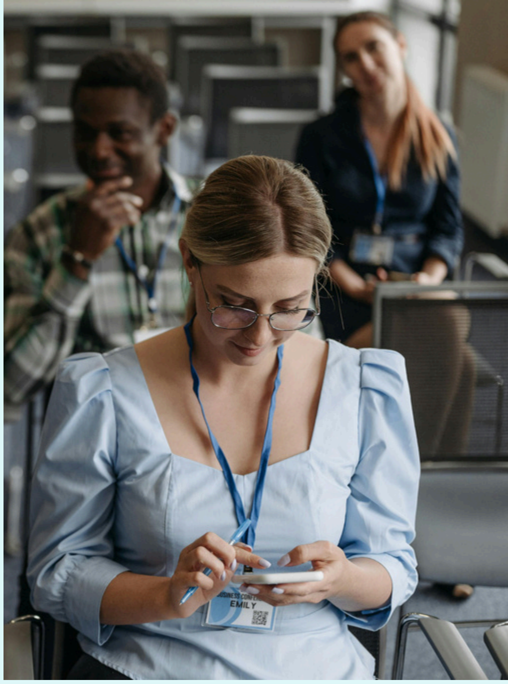
This is the layer that distinguishes strategic analysis from commentary. Data alone does not create change. Observation alone does not create direction. Interpretation requires the ability to distinguish an operational tweak from a structural redesign, a revenue opportunity from a reputational risk, a tradition worth preserving from a habit worth reexamining, and an incremental improvement from a strategic repositioning.

When historical data, observation, surveys, and interviews converge on the same finding, that finding is no longer debatable. It becomes the foundation for confident decision-making. And when they diverge—when surveys say one thing but observation reveals another—that divergence is often where the most important insights live.

THE FINDINGS NOBODY ASKS FOR

Across more than a decade of event analysis engagements—spanning state and national trade and professional associations, government and public sector agencies, and nonprofit and philanthropic organizations—certain patterns emerge with striking consistency. These are not dramatic failures. They are cumulative misalignments that erode value quietly over time, often masked by stable satisfaction scores and reliable revenue. The findings that follow are drawn from real engagements, presented generically to protect client confidentiality.

The Overprogramming Trap



Many associations operate on a long-standing assumption: more sessions equal more value. Over the past decade, this has produced increasingly dense agendas—multiple concurrent breakouts, optional tracks layered on top of governance meetings, and evening programming added to preserve tradition or justify an extra hotel night.

The result is often a fragmented attendee experience. Participants navigate what amounts to a "choose-your-own-adventure" schedule with few shared moments. Hallways empty out unpredictably during breakout blocks. Sponsors and exhibitors report uneven traffic. Networking happens informally in lobbies rather than through designated touchpoints. And losing sessions—scheduled late on the final day when most attendees have mentally checked out or physically departed—draw a fraction of the registered audience, undermining both the speaker's experience and the event's ability to end on a collective, high-energy note.

The issue is not volume. It is intentionality. Events are not merely delivery vehicles for content. They are environments for connection and shared experience. When programming density exceeds cognitive and emotional capacity, engagement diminishes—even when satisfaction scores remain stable. In one conference, Friday afternoon breakouts averaged 40 attendees per session while Thursday morning sessions averaged 100. The schedule hadn't changed. The audience had simply run out of capacity.

THE SPONSOR AND EXHIBITOR VISIBILITY PARADOX

In many associations, sponsor and exhibitor recognition follows a familiar and comfortable pattern: logos on the website, a slide deck acknowledgment, verbal thanks from the stage, and booth space in the exhibit hall. These elements are important. They are also baseline. When sponsor and exhibitor revenue constitutes a significant percentage of total event income—and in some organizations it may represent half or more—recognition alone is insufficient.

Structured observation consistently reveals a paradox: sponsors and exhibitors invest substantially, yet their integration with the attendee experience is shallow. Mobile apps underutilize sponsor and exhibitor tiles or ads. Activations are indistinguishable from standard exhibit booths. Traffic patterns route attendees away from exhibit spaces during peak windows.

Exhibitors report that certain hours are productive while others feel like empty time, yet no one has mapped traffic flow to help them anticipate or plan for these patterns. And the assumption that longer exhibit hours equal greater value—setting up at 8 a.m. and staying through 8 p.m.—often produces the opposite effect: thinly staffed tables during the windows that matter most, and exhibitor fatigue that diminishes the quality of every interaction.

The visibility question also intersects with mission in complex ways. In organizations that serve sensitive populations, the prominence of corporate sponsor branding can create genuine tension with mission-aligned audiences—particularly when logos appear in spaces designed to feel psychologically safe and non-commercial. The solution is not to eliminate sponsor or exhibitor recognition but to redesign it thoughtfully. Sponsors increasingly seek meaningful engagement opportunities and data that demonstrates return on investment. Exhibitors want to know when to staff their tables, which hours will drive traffic, and how the physical layout serves or undermines their visibility. Organizations that evolve from passive logo placement toward intentional, flow-based integration protect both the revenue relationship and the attendee experience.

THE SACRED COW INVENTORY

Nearly every association harbors practices that persist because they are familiar rather than because they are still serving their intended purpose. The through line is not negligence—it is momentum. No one decided these things should last forever. They simply never had a structured reason to revisit them. A governance meeting that occupies the same pre-conference time slot it has held for a decade—even though it now conflicts with revenue-generating educational programming. A highlight event launched years ago to commemorate a milestone that has since passed—still costing tens of thousands of dollars annually, and drawing inconsistent attendance. A post-conference workshop discontinued due to low attendance whose ghost still shapes how the team thinks about the final day.

Structured event observation creates the evidence base to name these patterns without blame or shame. When a practice is identified not as someone's mistake but as a structural misalignment between tradition and current audience behavior, the conversation shifts from defensive to productive.

Forward-looking organizations do not discard tradition reflexively. They evaluate it deliberately.

THE GAP BETWEEN BACKSTAGE AND FRONT-OF-HOUSE

One of the most consistent findings across engagements is the disconnect between how staff experience the event and how attendees do. Teams report uneven workloads, unclear role ownership, late handoffs between departments, last-minute decision-making, and communication gaps that create unnecessary friction. Sponsorship and exhibitor responsibilities may be concentrated in one person with limited cross-team visibility. General session scripts are finalized at the last minute. Signage is produced onsite rather than in advance. Volunteer scheduling is completed too close to the event.

These behind-the-scenes dynamics are largely invisible to attendees—until they aren't. The session that starts five minutes late because the AV handoff wasn't smooth. The room host who forgot to turn on the microphone. The sponsor reception where no board members were assigned to engage with sponsors intentionally. Each of these moments is minor in isolation. Collectively, they shape the perceived professionalism and intentionality of the entire event.

The operational recommendation that surfaces most frequently is not a specific fix but a cultural shift: moving from a model where individual staff members own their pieces in isolation to a cross-functional accountability framework with shared timelines, clear decision-making authority, and explicit handoff protocols. The mechanics vary by organization, but the principle is universal.

What Historical Data Reveals When You Finally Look

In many organizations, the historical data needed to understand event trends already exists—scattered across spreadsheets, financial reports, registration systems, and post-event summaries that were created, filed, and never cross-referenced. The act of consolidating multi-year data into a single analytical frame often produces findings that are simultaneously surprising and, in retrospect, obvious.

Attendance that appears stable in aggregate may reveal significant segmentation shifts when broken down by audience type. Revenue that looks healthy on the topline may show increasing concentration risk when analyzed by source. Comped registrations that seem reasonable at 15 percent may look different when compared to a five-year average of 22 percent and a peak of 35 percent—raising questions about whether the comp policy has been intentionally managed or simply evolved by default. Room-block pick-up rates that consistently fall short in one city while overperforming in another may suggest that site selection decisions are being made on criteria that don't align with actual attendee behavior.

The most important insight from historical data is often the simplest: the trend line. Not what happened this year, but what has been happening over several years, quietly and incrementally, while everyone was focused on the event in front of them.

THE VALUES ALIGNMENT QUESTION

Perhaps the most sensitive finding involves the tension between what an organization says it values and how those values are expressed—or contradicted—in the event experience. An organization that prioritizes accessibility but sets its rooms so tightly that navigating between rows requires turning sideways, offers no slide access for neurodivergent attendees who benefit from previewing content beforehand, and fails to enforce microphone use in breakout sessions for attendees who depend on amplification to participate. An organization that champions diversity but relies on the same presenter pool year after year, rarely recruiting voices from outside its established networks. An organization that speaks openly about belonging but has not identified all-gender restroom options in its event venue, or confirmed the availability of a private, accessible space for nursing attendees.

These are not accusations. They are design gaps that become visible only when someone is intentionally looking for them. Addressing them is not about performative compliance; it is about ensuring that the event experience is congruent with the organizational identity. When it is, attendees feel it. When it isn't, they feel that too—even if they can't articulate why.

The Duration Question

Many associations continue to operate under extended, multi-day event footprints established a decade or more ago. These models were built during a period when travel norms, member expectations, and work flexibility differed significantly from today's environment. In a post-pandemic landscape, attendees are increasingly selective about time away from family, travel budgets, opportunity cost, and cognitive bandwidth. The automatic decision to attend annually is no longer a done deal for many members.

Structured observation frequently surfaces thinning attendance on final-day sessions, reduced exhibitor traffic after peak hours, early departures, staff fatigue, and programming blocks operating well below capacity. This does not automatically mean an event should eliminate a day. It does mean duration should be evaluated intentionally rather than inherited by default. Does each day have a clear strategic purpose? Are certain days carrying disproportionate engagement? Would compression enhance energy, along with sponsor and exhibitor exposure? Would redesigning the rhythm create stronger shared moments? These are strategic questions, not logistical ones—and they deserve strategic answers grounded in evidence rather than assumption.

FROM FINDINGS TO ACTION

The real value of event analysis lies in what happens next.

A comprehensive event analysis produces a report. A report produces conversations. What determines whether those conversations lead to meaningful change is whether the organization has a structured pathway from insight to implementation—one that distinguishes between what can be addressed quickly, what requires coordinated planning, and what demands leadership-level strategic decisions.

THREE HORIZONS OF CHANGE

Recommendations from a comprehensive event analysis typically fall across three horizons, each requiring different levels of effort, authority, and time.

HORIZON 1	HORIZON 2	HORIZON 3
Immediate Refinements	**Structural Realignment**	**Strategic Repositioning**
Quick wins that build confidence	*System-level changes over 1-2 planning cycles*	*Leadership decisions for multi-year impact*

Immediate refinements are low-lift adjustments that enhance clarity, professionalism, and attendee flow without requiring structural change. Increasing signage density at key decision points. Simplifying badge design. Aligning room assignments with historical attendance data. Populating the mobile app more intentionally. Clarifying sponsor and exhibitor deliverables. Standardizing slide and AV specifications for presenters. Adding sound cues to signal session transitions. These improvements build confidence quickly and demonstrate that the analysis is producing visible results.

FROM IMPROVEMENT TO TRANSFORMATION

Structural realignment involves mid-range changes that require coordinated planning across teams. Redesigning the sponsor and exhibitor integration model so it moves beyond logo placement toward intentional, experience-based visibility. Reevaluating governance meeting timing relative to educational programming. Introducing shared anchor moments—keynotes, awards ceremonies, or structured networking—that create collective experience. Reducing concurrent session density to concentrate attendance and energy. Extending breakout sessions from 60 to 75 minutes to protect Q&A time. Enhancing speaker coaching for engagement and delivery. These shifts strengthen system coherence and typically unfold over one to two planning cycles.

Strategic repositioning involves higher-level decisions that require senior staff engagement and multi-year planning—and maybe even board engagement depending on the organization's governance structure. Clarifying or refreshing the event's purpose and mission. Rebalancing the revenue mix to reduce concentration risk. Reevaluating duration and footprint relative to attendee behavior and travel patterns. Redefining target audience segments and setting attendance goals by segment. Reconsidering the event's role within the broader industry, including its relationship to peer organizations, emerging competitors, and underserved audiences. These decisions shape the trajectory of the event for years to come and should be informed by evidence, not assumption.

OPERATIONALIZING THE PLAN

The most common failure point in event improvement is not a lack of good ideas but a lack of structured follow-through. Organizations leave a report debrief or board presentation energized by findings and aligned on priorities, then return to the operational demands of daily work. Ninety days later, the report sits on a shared drive and the next planning cycle begins with the same assumptions as the last one.

Effective implementation requires a few disciplined structures. First, clear ownership: for each strategic priority, one person is accountable for driving the work forward, with defined roles for those who support, contribute, or need to be consulted. Second, a first-year accomplishment framework that translates broad strategic directions into specific, measurable milestones mapped to a quarterly calendar. Third, 90-day implementation plans that break first-quarter milestones into concrete steps with assigned owners and timelines. And fourth, a prioritization tool that helps the team identify the six most catalytic actions for the first 90 days, creating a shared visual reference that keeps everyone aligned on what matters most right now.

This is not project management for its own sake. It is the mechanism that converts a report into organizational change. Without it, even the most insightful analysis becomes an expensive shelf document.

THE CHANGE MANAGEMENT *Reality*

Transforming an established event—particularly one with decades of history, existing venue contracts, and deeply held traditions—requires a realistic sense of how long meaningful change takes to implement. In most cases, substantial adjustments unfold over a multi-year horizon. The first year is typically devoted to planning conversations, contract evaluation, internal alignment, and targeted quick wins. The second year begins to implement structural changes that attendees will notice. By the third year, if the work has been consistent and communicated well, participation patterns begin to reflect the new design.

This timeline is not a reason for delay. It is a reason for urgency. The sooner an organization begins the diagnostic work, the sooner it can start making decisions grounded in evidence rather than assumption. A phased, transparent approach—paired with clear communication about what is changing and why—builds momentum while maintaining the trust of attendees, sponsors, exhibitors, speakers, volunteers, and other key stakeholders who have come to rely on the event in its current form.

IS YOUR EVENT READY FOR THIS?

Not every event requires a full-scale analysis every year.

But there are specific inflection points when structured observation and comprehensive review become particularly valuable—moments when the cost of not looking exceeds the cost of looking.

Attendance has plateaued or shifted in composition. Stable numbers can mask segmentation drift. A long-standing audience may be aging. Early-career participation may be declining. Sponsors and exhibitors may be renewing but questioning long-term value. When participation patterns shift incrementally over time, analysis helps distinguish between natural variation and structural misalignment.

Sponsorship or exhibitor revenue feels fragile. If a small number of sponsors or exhibitors account for a significant share of total event income, or if sponsor and exhibitor feedback includes questions about ROI, visibility, or meaningful engagement, evaluation becomes strategic rather than optional. Partner confidence is easier to maintain than to rebuild.

Financial performance is inconsistent. Rising costs in AV, food and beverage, venue rentals, and labor have reshaped the economics of in-person events. When the margin fluctuates or staff bandwidth is stretched to the point of fragility, analysis can surface structural adjustments that protect sustainability.

Governance structures are being reevaluated. Board transitions, leadership changes, or broader strategic planning cycles often create space for reconsidering how governance intersects with the event footprint. Structured analysis provides evidence-based clarity during these moments.

Venue contracts are up for renewal. Before committing to another multi-year agreement—particularly one that locks in a duration, layout, and footprint established years ago—leadership should be confident that the event's structure still aligns with member expectations, sponsor and exhibitor value, and financial sustainability. Duration, layout, and flow are strategic decisions, not logistical defaults.

The event hasn't been critically examined in several years. Even well-run events benefit from periodic outside perspective. Organizations that wait until something is visibly wrong often find that the misalignment has been building for years. A proactive review costs less—in time, money, reputation, and organizational energy—than a reactive one.

Leadership senses that something feels off. This may be the most important trigger, albeit a little less tangible. Often, senior leaders or meeting professionals can sense the misalignment before data confirms it. Energy feels uneven. Conversations feel fragmented. Staff feel stretched. Structured event analysis transforms intuition into evidence.

Because the question is not whether your event is "good." The question is whether it is intentionally designed for the future.

TOWARD A NEW STANDARD FOR EVENT EVALUATION

Association events have evolved dramatically over the past decade—and even more rapidly in recent years. Attendees are more selective with their time. Sponsors and exhibitors expect measurable integration rather than passive recognition. Boards are increasingly attentive to financial resilience. Staff capacity is finite and, in many organizations, diminishing. Yet evaluation methods have remained largely unchanged: post-event surveys, anecdotal feedback from the loudest voices, and year-over-year financial comparison.

These tools are useful, but they are not sufficient. A new standard for event evaluation must recognize that events are systems—interconnected environments shaped by design, behavior, rhythm, and strategy. Structured observation does not replace surveys; it enhances them. Stakeholder interviews do not replace financial analysis; they contextualize it. Historical data does not dictate direction; it informs interpretation. When these layers are integrated intentionally, organizations gain something that no single tool can provide on its own: clarity.

Clarity about what is working and what is underperforming. Clarity about where tradition is serving the mission and where it is constraining evolution. Clarity about whether duration, structure, and investment still align with the needs of today's members—not the members of yesteryear. Clarity about whether sponsors and exhibitors are getting the value they're paying for, or whether they're renewing out of loyalty that may eventually run thin.

The goal of comprehensive event analysis is not criticism. It is not fault-finding. It is not a report card. It is alignment—between what the event is doing and what the organization needs it to do. Between the experience that is designed on paper and the experience that unfolds in real time. Between the story the organization tells about its event and the story the event tells about the organization.

BECAUSE YOUR EVENT DOES NOT EXIST TO PRESERVE ITS FOOTPRINT.

It exists to advance your mission. And the only way to know whether it's doing that—really doing that—is to look.

FREQUENTLY ASKED QUESTIONS

How long does a comprehensive event analysis take? The full process typically spans a minimum of four months, from initial discovery and historical data collection through onsite observation, post-event surveys and interviews, and delivery of the final report. The observation itself covers the full duration of the event. Timeline varies based on event complexity, the number of stakeholders interviewed, and how readily historical data is available.

How is this different from hiring a meeting planner or event management company? Meeting planners and event managers are responsible for producing the event—logistics, vendor coordination, timelines, and onsite operations. A comprehensive event analysis evaluates the event from the outside, with no responsibility for its production. That independence is what makes the findings credible. We are not managing your event; we are watching it the way your most discerning attendee, speaker, sponsor, exhibitor, and volunteer would—but with a structured framework and two decades of association context behind the observations.

Will my staff feel like they're being evaluated or criticized? This is one of the most common concerns, and it's an important one. The analysis is designed to evaluate the event as a system, not to assess individual staff performance. Findings focus on structural patterns—flow, timing, design choices, handoff protocols—not on who made a mistake on a specific day. In practice, staff often find the process validating; many of the friction points we surface are things they have long sensed but lacked the neutral evidence to raise. The report gives them language and data to advocate for changes they already know are needed.

Do you share the full report with the board? That's entirely the organization's decision. Some clients share the full report with their board; others present a summary of key findings and recommendations. We can support either approach, including presenting findings directly to the board or senior leadership if that would be helpful. We also work with clients to determine what level of detail is appropriate for other interested and affected audiences.

What if we just had a strong year—is this still relevant? Especially so. The most valuable time to conduct an analysis is when things appear to be working well, because that's when structural vulnerabilities are easiest to miss and hardest to raise internally. A strong year creates the stability and goodwill needed to make strategic changes from a position of confidence rather than crisis. Organizations that wait until something is visibly wrong often find that the misalignment has been building for years.

Can we do just the onsite observation without the other layers? We can scope engagements flexibly, but we would counsel against observation in isolation. Observation tells you what happened; historical data tells you whether it's a pattern or an anomaly; surveys tell you how people perceived it; interviews tell you why. The layers work as a system. Removing one doesn't just reduce the scope—it reduces the reliability of the conclusions. That said, not every engagement requires the same depth in every layer, and we tailor the balance based on the organization's needs and budget.

How do you protect confidentiality—both ours and the people you interview? All findings are presented in aggregate. Individual interview responses are never attributed by name in the report. Stakeholders are identified by category (board member, staff, sponsor, etc.) but not individually, which is what allows the conversations to be candid. We also do not name client organizations in any external materials or social posts without explicit permission.

What happens after we receive the report? The report is a starting point, not an endpoint. We present findings and recommendations to your leadership team and facilitate discussion about priorities and sequencing. For organizations that want structured support beyond the report, we offer facilitated implementation planning—a process that translates findings into long-term success measures, first-year accomplishments, quarterly calendared milestones, 90-day action plans, and clear accountability frameworks.

What does this cost? Investment varies based on several factors: event size and complexity, how complete the historical data is, whether experience surveys need to be redesigned or aggregated prior to analysis, the number of stakeholders interviewed, and whether the engagement includes implementation planning beyond the report. We provide a tailored scope of work and investment summary after an initial consultation, but organizations can anticipate a starting investment of $10,000 plus expenses. For a conversation about what an engagement might look like for your organization, contact Lindsay Thomas, Director of Client Engagement, at **lindsay@eventgarde.com**.

ABOUT EVENT GARDE

Since 2011—and celebrating 15 years of collective impact in December 2026—Event Garde has partnered with more than 150 associations and other mission-driven organizations to help them think more collaboratively, plan more boldly, and implement with greater intention. The firm works across four core service areas: facilitation, strategic planning, learning design, and event strategy. But more than a set of services, Event Garde is a thought partner—one that prioritizes deep, values-aligned client relationships and holds itself accountable to outcomes, not just deliverables.

That philosophy shapes everything we do, including the comprehensive event analysis work described in this white paper. The patterns surfaced through this work emerge consistently across engagements spanning healthcare, education, trade and professional associations, government, nonprofit, and legal sectors. Event Garde brings both the rigorous methodology to uncover these findings and the trusted expertise to interpret what they mean. The goal is never to critique; it is to equip leadership with the clarity needed to act.

Aaron Wolowiec, FASAE, CAE, CMP Fellow

Founder and President of Event Garde, Aaron Wolowiec is a nationally recognized consultant and certified Technology of Participation (ToP) facilitator and mentor trainer whose work is rooted in the belief that the best outcomes emerge when every voice in the room is meaningfully heard and valued. An ASAE Fellow (Class of 2025), CMP Fellow (Class of 2022), DELP Scholar (Class of 2009–2011), Forbes Business Council member, and contributing author to *Professional Practices in Association Management*, Aaron is a sought-after voice on facilitation, organizational strategy, and the leadership practices that help associations thrive.

To explore whether a comprehensive event analysis is right for your organization, contact Lindsay Thomas, Director of Client Engagement, at **lindsay@eventgarde.com** or visit **eventgarde.com**.

APPENDIX A:
SAMPLE HISTORICAL DATA FRAMEWORK

The following represents a simplified overview of the domains and questions that guide the historical data review. The full proprietary framework is tailored to each engagement based on the organization's goals, event history, and data availability. Organizations are asked to compile multi-year data (typically three to five years) across these domains prior to the onsite observation.

1. Event Purpose and Strategic Impact

- What is the stated purpose of this event, and when was it last reviewed?
- How does this event fit within the organization's broader education and programming portfolio?
- What competing or comparable events serve a similar audience, and how does yours differentiate?
- How is post-event data currently used to inform future decision-making?

2. Audience and Engagement

- What are the key audience segments, and how has attendance by segment trended over time?
- What career stages does the event primarily serve, and to what extent are there gaps in early-career or emerging professional participation?
- What do aggregate satisfaction trends reveal over the past several years—not anecdotally, but in the data?
- What structured and informal networking opportunities exist, and how well are they utilized?

3. Financial and Business Performance

- What are the revenue, expense, and margin trends for the past three to five years?
- How diversified is the revenue mix across registration, sponsorship, exhibitor, and other sources?
- How many sponsors and exhibitors participate, what packages exist, and how well do they sell?
- What are the room-block commitments, pick-up rates, and variance to projections by year?
- What are the AV and food and beverage spending trends, and to what extent are they within budget?

4. Content and Experience

- What is the overall event structure—number of general sessions, breakouts, receptions, and special events?
- How well does the current schedule and flow meet attendee needs based on available evidence?
- How are speakers and facilitators prepared and supported before, during, and after the event?
- What continuing education credits are offered, and what is the actual utilization rate?

5. Operations and Logistics

- What feedback do staff and volunteers provide about their roles, workload, and operational bottlenecks?
- Have any unexpected issues arisen in the past several years—security, health, weather, or public relations?
- Are there outstanding contract issues, policy concerns, or compliance risks?

6. Values and Impact

- To what extent are diversity, equity, inclusion, and belonging considered in event planning and delivery?
- How accessible is the event for attendees with visible and invisible disabilities?
- How intentionally does the event design account for neurodivergent attendees, including sensory considerations, processing time, and access to advance materials?
- What attention is given to attendee health and wellbeing, including food and beverage options, rest and recovery space, and the overall pace of the program?
- What sustainability practices are in place, and how are environmental concerns factored into decisions?

7. Successes, Challenges, and Sacred Cows

- What have been the biggest wins for this event in recent years and should be retained?
- What are the persistent pain points or areas that stakeholders consistently identify as needing improvement?
- What long-standing practices, policies, or assumptions are rarely questioned—even if they may no longer serve the organization effectively?

APPENDIX B:
SAMPLE OBSERVATION FRAMEWORK

The following represents a simplified overview of the domains and questions that guide structured event observation. The full proprietary framework is tailored to each engagement based on the organization's goals, event type, scheduled sessions, and known areas of concern.

1. Arrival and First Impression
- Is the event visually identifiable within the venue upon arrival?
- Does signage reinforce brand presence and provide clear directional guidance?
- Does the energy onsite match the tone established in pre-event marketing?
- Are welcome touches present (e.g., branded materials, staff/volunteer greeters)?

2. Registration and Wayfinding
- Is the check-in process intuitive and efficient?
- Are there bottlenecks during peak arrival and check-in periods?
- Is badge design readable and does it include useful information?
- Are session locations clearly communicated through signage and digital tools?

3. Session Engagement and Content Design
- Are rooms appropriately sized for actual attendance?
- What is the ratio of lecture to interaction across session types?
- Are speakers prepared for transitions, technology, and time management?
- Are handouts, slides, or supplementary materials accessible?
- Do session lengths and transition breaks support sustained engagement?

4. Sponsor and Exhibitor Integration
- Are sponsors and exhibitors placed in high-traffic areas?
- Is there meaningful differentiation between sponsor and exhibitor activations?
- Are digital tools (app, signage, notifications) leveraged for visibility?
- Are exhibitor tables consistently staffed during peak traffic windows?
- Do traffic patterns support or undermine engagement during key hours?

5. Food and Beverage Operations
- Does the F&B layout support smooth flow and avoid bottlenecks?
- Are dietary needs clearly labeled and accommodated?
- Do meal locations drive traffic toward or away from exhibit spaces?

6. Digital Ecosystem

- Is the mobile app fully populated with session details, speaker bios, and logistics?
- Are push notifications and in-app announcements used proactively?
- Is sponsor and exhibitor content differentiated and complete?
- Is essential information (Wi-Fi, venue map, emergency details) easily accessible?
- Are audiovisual elements—screen visibility, sound quality, microphone use, and lighting—consistently supporting the experience across all session spaces?

7. Special Events and Networking

- Do receptions and social events support intentional connection?
- Are structured networking opportunities provided (e.g., speed networking, meetups)?
- Do wellness and restoration spaces function as intended?

8. Informal Behavior and Energy Mapping

- Where do attendees naturally cluster during breaks and transitions?
- When does energy dip and when does it peak?
- Which spaces feel vibrant versus vacant at different times of day?
- When do attendees begin departing the event?

APPENDIX C:
SAMPLE EXPERIENCE SURVEY QUESTIONS

Rather than relying on a single all-attendee instrument, Event Garde recommends unique surveys for each relevant stakeholder segment—typically attendees, speakers, exhibitors, sponsors, and volunteers—distributed only to members of those respective groups. Responses are aggregated within each segment and analyzed both independently and in relation to one another, often revealing meaningful gaps between how different groups experienced the same event.

Attendees

- What factors most influenced your decision to attend this event?
- How satisfied were you with the quality and relevance of the educational content?
- To what extent did the event meet your networking or connection goals?
- How comfortable and navigable was the physical environment, including room temperature, accessibility, and wayfinding?
- How well did the program schedule—including session length, pacing, and breaks—support your ability to engage fully?
- How well did the event reflect the organization's values and commitment to inclusion?
- How would you rate the overall value of this event relative to the cost of attendance?
- How likely are you to attend this event again, and would you recommend it to a colleague?

Speakers

- How clear and accessible was the call for presentations process?
- How clear and timely was the communication you received before the event?
- Were the resources provided to help you prepare adequate and useful?
- How well did the presentation space, room setup, and AV technology support the kind of session you were trying to deliver?
- How engaged was your audience, and to what extent did the format and environment support meaningful interaction?
- What was the most significant challenge you encountered, and what one change would most improve the speaker experience?

Exhibitors

- What were your primary objectives as an exhibitor, and to what extent were they met?
- How well did your exhibit placement support meaningful interaction with attendees given the overall flow of the event?
- How would you describe the quality and volume of attendee interactions at your table/booth?
- How seamless were the logistics in your experience, including load-in, load-out, and pre-event communication?
- Would you exhibit at a future event, and what would make the experience more worthwhile?

Sponsors

- What motivated your organization to sponsor this event, and what did you hope to achieve?
- How would you rate the clarity and timeliness of pre-event communication about your sponsorship?
- How well did your sponsorship experience meet your expectations across each benefit area?
- What tangible outcomes or connections resulted from your sponsorship, and how are you measuring the value of your participation?
- How likely are you to sponsor this event again, and what would make the experience more worthwhile?

Volunteers

- How clear and helpful was the information and training you received before the event?
- Did you feel adequately prepared and supported in your role onsite?
- How well did your assignment match your interests and availability, and was the time commitment what you expected?
- How would you describe the working relationship between volunteers and organization staff during the event?
- What aspects of your volunteer experience were most meaningful or enjoyable?
- Would you volunteer at this event again, and what would make the experience more rewarding?

APPENDIX D:
SAMPLE STAKEHOLDER INTERVIEW QUESTIONS

The following represents a simplified overview of the questions that could guide post-event stakeholder interviews. The full interview protocol is tailored to each engagement based on the organization's goals, event type, stakeholder mix, and areas of concern. Interviews are semi-structured, typically lasting 15–20 minutes, and conducted individually to encourage candor.

Board Members
- What do you see as the primary purpose or value of this event for the organization and its members?
- Based on what you've seen or heard, what aspects of the event are most successful or meaningful?
- What areas of concern or challenges do you believe need to be addressed?
- How well does this event align with the organization's mission, vision, values, and strategic goals?
- In your opinion, how has the event evolved over the past few years—and to what extent is it headed in the right direction?

Staff
- What aspects of the event did you personally support or lead?
- From your perspective, what went really well this year?
- Where did you see pain points or opportunities for improvement during planning or implementation?
- How easy or difficult was it to collaborate across team members and vendors?
- What would help the team improve internal planning or day-of operations?

Sponsors or Exhibitors
- What motivated your organization to sponsor or exhibit at this year's event?
- How would you describe the visibility and value you received from your package?
- Were your expectations for engagement with attendees met? Why or why not?
- How clear and seamless was the communication and logistics process pre-event?
- What changes would increase the value of participation for your organization in future years?

Speakers

- How would you describe your overall experience presenting at this event?
- What kind of support or communication did you receive before the event? Was it adequate?
- How did the AV setup, room layout, and audience engagement affect your presentation?
- From your perspective, how does this event compare to others you've presented at?
- What changes or improvements would make this a stronger experience for speakers?

Volunteers

- How would you describe your overall volunteer experience?
- How clear and helpful was the communication or training you received in advance?
- Did you feel prepared and supported in your role onsite?
- What aspects of your volunteer role worked well, and where did you encounter challenges?
- What improvements would make volunteering more rewarding or effective in the future?

APPENDIX E:

SAMPLE FINDINGS-AT-A-GLANCE

The following illustrates the type of high-level summary findings that emerge from a comprehensive event analysis. Actual reports include detailed narrative, supporting data, and specific recommendations for each finding.

Domain	Finding Summary	Horizon
Attendee Flow	Breakfast placement near exhibits drives morning traffic, but attendees move directly from buffet to ballroom without pausing. By the time the general session ends, the natural reason to linger has disappeared due to breakout start times.	Horizon 1
Session Capacity	Three of five breakout rooms consistently exceeded capacity while two operated below 40%. Room assignments are not informed by historical attendance data.	Horizon 1
Sponsor Integration	Sponsor recognition is limited to logo placement and verbal acknowledgment. Mobile app sponsor profiles are inconsistently populated. No structured sponsor-attendee engagement touchpoints exist.	Horizon 2
Exhibitor Experience	Exhibitor traffic peaks Thursday morning and declines sharply Friday mid-day. Exhibitors lack guidance on optimal staffing windows. Several tables were unstaffed during peak hours.	Horizon 1-2
Schedule Rhythm	60-minute sessions with 15-minute breaks compress transitions. Sessions routinely start late, reducing Q&A time and creating cumulative schedule drift by mid-afternoon.	Horizon 2
Governance Timing	House of Delegates overlaps pre-conference education, limiting leadership participation in CE programming and reducing pre-conference attendance.	Horizon 2-3
Closing Session	Final-day closing session drew about 25% of registered attendees. Room was visibly sparse with exhibits already packed up, undermining the event's collective conclusion.	Horizon 2
Duration	Friday afternoon sessions averaged 40 attendees vs. 100 on Thursday morning. Attendance, energy, and exhibitor traffic all indicate diminishing returns on the final day.	Horizon 3

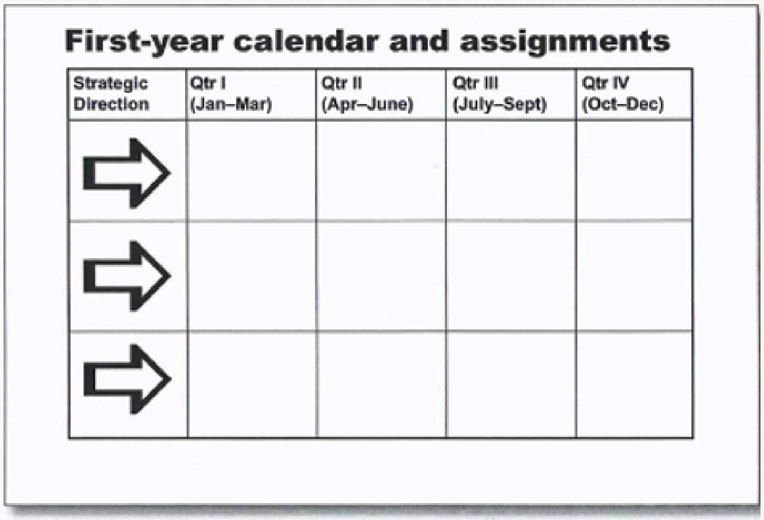
APPENDIX F:

IMPLEMENTATION TEMPLATE OVERVIEW

For organizations that move from analysis to action, Event Garde offers facilitated implementation planning using a structured, four-step process rooted in the Technology of Participation (ToP) methodology, developed by the Institute of Cultural Affairs (ICA). This overview describes each step; the full facilitation uses collaborative worksheets completed in real time with leadership teams.

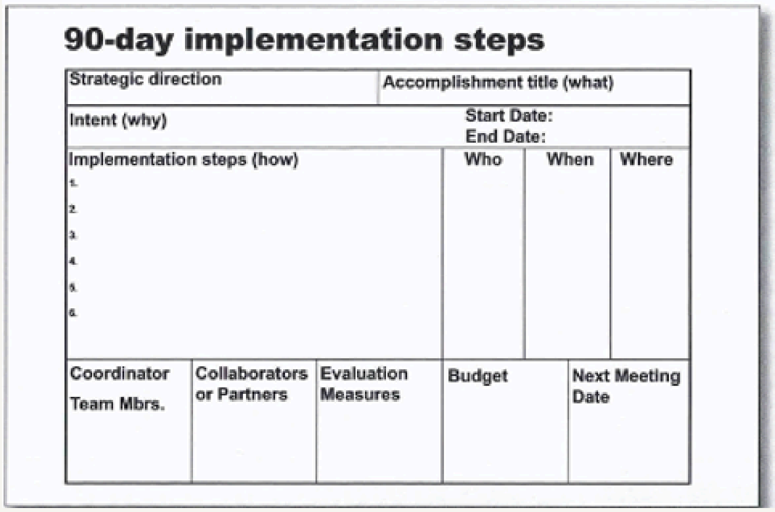
First-year accomplishments

Strategic Direction		
Current reality	First-year accomplishments	Success Indicators



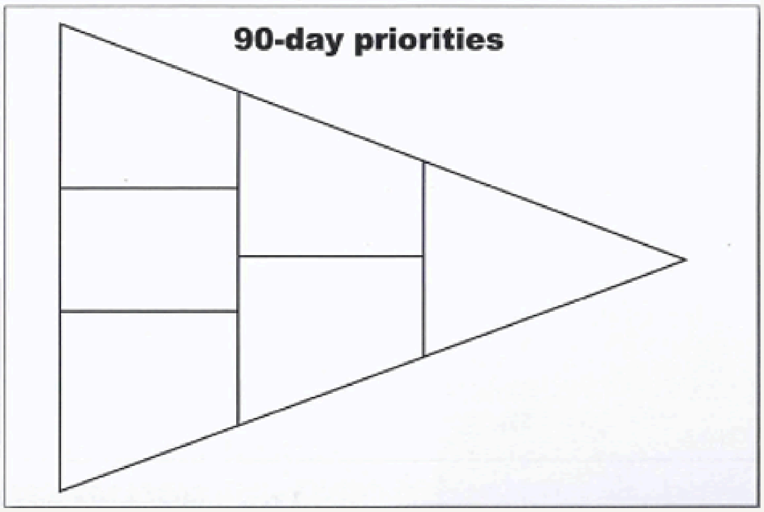
First-year calendar and assignments

Strategic Direction	Qtr I (Jan–Mar)	Qtr II (Apr–June)	Qtr III (July–Sept)	Qtr IV (Oct–Dec)



90-day implementation steps

Strategic direction		Accomplishment title (what)		
Intent (why)		Start Date: End Date:		
Implementation steps (how) 1. 2. 3. 4. 5. 6.		Who	When	Where
Coordinator Team Mbrs.	Collaborators or Partners	Evaluation Measures	Budget	Next Meeting Date



Step 1: First-Year Accomplishments
For each strategic priority, the team identifies the current reality (positive and negative factors), success indicators (measurable outcomes for a two-year window), and 6–12 specific first-year accomplishments that will build momentum. Accomplishments are drafted using SMART criteria: specific, measurable, attainable, relevant, and time-based.

Step 2: First-Year Calendar and Assignments
First-year accomplishments are mapped to a quarterly calendar and assigned to responsible individuals or teams. This step surfaces sequencing conflicts, resource gaps, and dependencies across strategic priorities.

Step 3: 90-Day Implementation Plans
For each accomplishment targeted in the first 90 days, the team develops a detailed implementation plan including: what the accomplishment is, why it matters, specific implementation steps, who is responsible for each step, timelines, team members, collaborators, evaluation measures, budget considerations, and the date of the next team meeting, as appropriate.

Step 4: 90-Day Priorities
The team identifies the six most catalytic actions for the first 90 days and maps them in a shared visual prioritization tool. This creates a quick-reference for leadership that keeps the most important near-term work visible and top-of-mind across the organization.

Accountability Structure
Each strategic priority is supported by a clear MOCHA accountability framework that defines the following five roles:

Role	Description
Manager	The person who holds the Owner accountable and keeps the work on track. They ask questions, review progress, share feedback, and step in when things drift. This person may or may not be the Owner's supervisor.
Owner	The person with overall responsibility for driving the project forward. They coordinate the moving pieces, ensure the work gets done (directly or through Helpers), and involve the right people along the way. There should be one Owner—not two and not a committee.
Consulted	The people whose input, perspective, or resources are needed to inform the work. They contribute to the thinking but don't own the outcome.
Helper	The people who carry out portions of the work under the Owner's coordination.
Approver	The person or body who signs off on key decisions before they're final. In an association context, this might be the executive director, a board chair, or a committee with decision-making authority.

This structure ensures shared ownership without diffused accountability. For a deeper look at how this framework works, how to apply it, and how it compares to RACI, **see this blog post**.

APPENDIX G:
SAMPLE SCOPE OF WORK

The following outlines the typical phases and deliverables of a comprehensive event analysis engagement. Scope, timeline, and investment are tailored to each organization based on event size, complexity, and strategic objectives.

Phase 1: Discovery and Historical Data Review
- Initial consultation with senior staff and event leadership
- Data collection framework provided to organization (multi-year metrics across seven domains)
- Consolidation, formatting, and analysis of historical data
- Baseline summary identifying trends, risks, and areas for onsite focus

Phase 2: Structured Event Observation
- Full immersion in the attendee experience across all program days
- Observation across a minimum of eight domains (arrival, registration, sessions, sponsors/exhibitors, F&B, digital, special events, informal behavior)
- Real-time documentation of attendance patterns, flow, engagement, and operational dynamics
- Basic photography to supplement narrative findings (where appropriate)

Phase 3: Experience Surveys
- Review and refinement of existing survey instruments—or design of new ones—segmented by attendee, exhibitor, sponsor, speaker, and volunteer populations
- Organization distributes surveys to each respective group following the event
- Analysis of quantitative ratings and open-ended responses across all segments

Phase 4: Stakeholder Interviews
- Semi-structured interviews (15–20 minutes) with typically 12–15 stakeholders
- Interviewees typically include board members, staff, sponsors, exhibitors, speakers, and volunteers
- Thematic analysis of qualitative findings

Phase 5: Written Report and Strategic Recommendations
- Comprehensive written report synthesizing all four evidence streams
- Findings organized by domain with supporting data and observation insights
- Strategic recommendations sequenced across three horizons (immediate, structural, strategic)
- Presentation of findings to senior leadership and/or board (virtual or in-person)

Optional: Facilitated Implementation Planning

Implementation planning is available as an add-on service, scoped and priced based on the level of support your team needs.

- Facilitated debrief to reflect on findings and prioritize recommendations
- Facilitated planning session(s) to translate findings into two-year success measures, first-year accomplishments, a quarterly calendar, and 90-day action plans
- MOCHA accountability framework to clarify roles and ownership across the implementation team
- Ongoing check-ins at an agreed cadence to assess progress, address obstacles, and adjust priorities

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For a consultation tailored to your organization's event, contact Lindsay Thomas, Director of Client Engagement, at **lindsay@eventgarde.com** or visit **eventgarde.com**.

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