

**YOUR EVENT LOOKS FINE ON PAPER:
A SECRET SHOPPER MIGHT DISAGREE**

Tuesday, May 19, 2026
10 - 11 AM PT / 1 - 2 PM ET

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MEET YOUR SPEAKER



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LOGISTICS

- We're scheduled to be together for the next 60 minutes
- We do not have a formal break scheduled during this presentation
- Take care of your needs and those in your care
- We encourage you to silence the things that ding, ring and buzz
- Use technology to help keep you in the "room" today
- We will make all slides available to you following the presentation
- 1 CAE credit is available for participating in the live program only



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WAYS TO PARTICIPATE ON THE ZOOM PLATFORM

- **Q&A:** Use the Q&A function to submit questions to the speaker.
- **Chat:** Feel free to connect with other attendees via chat.
- **Reactions:** Use reactions to communicate non-verbally.
- **Captions:** Captions are available — turn them on anytime.
- **Recording notice:** This session is being recorded. Please avoid sharing confidential information.
- **AI notetaker:** Please refrain from using an AI notetaker during this session.

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TODAY'S AIMS




GAP

Understand why traditional event evaluation methods leave critical gaps




FRAMEWORK

See how structured observation, data, interviews, and surveys work together to build a fuller picture



ACTION

Walk away with a framework for turning insights into strategic action

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AGENDA

1 THE CONFIDENCE GAP
What traditional evaluations miss and why it matters


2 FIVE LAYERS OF EVIDENCE
A framework for comprehensive event analysis

3 FINDINGS NOBODY ASKS FOR
Cumulative misalignments that emerge across events

4 FROM FINDINGS TO ACTION
Three horizons of change

5 IS YOUR EVENT READY?
Triggers for structured analysis

6 Q&A AND REFLECTION
Your questions and next steps

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YOUR TURN

Before we dive in, let's ground ourselves in why you're here today. There's no wrong answer. Whether it's a specific challenge, general curiosity, or something you've been thinking about for a while.

SHARE IN CHAT (CHOOSE 1):

In one sentence:

- What brought you to this session today? or
- What are you hoping to walk away with?



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THE CONFIDENCE GAP

WHAT TRADITIONAL EVALUATIONS MISS AND WHY IT MATTERS

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THE STANDARD EVALUATION TOOLKIT

Most event evaluations rely on familiar tools. They measure real things, but a narrow band of real things.

WHAT SURVEYS MEASURE WELL

- Speaker quality ratings
- Content relevance
- Food and beverage satisfaction
- Overall experience scores
- Likelihood to recommend

WHAT SURVEYS RARELY MEASURE

- If flow patterns support sponsor exposure
- If governance draws leaders from education
- If room assignments match actual demand
- If schedule rhythm supports sustained energy
- If staff workload is structurally sustainable



*Surveys measure perception.
They do not generally measure
system performance.*

THE DEEPER EVALUATION GAPS

SURVEY FATIGUE & INACTION

Response rates are declining — and when members don't see action from past results, they stop responding. Many organizations end up basing decisions on a small, self-selected subset.

THE COMFORT OF FINANCIAL SUCCESS

Revenue performance is reassuring but can mask fragility. Sponsor concentration risk, cost escalation, and operational strain may sit beneath a profitable surface.

THE SILENCE PROBLEM

Absence of complaints is not evidence of satisfaction. Attendees adapt quietly — skipping stale sessions, leaving early, attending every other year — behaviors invisible to surveys.

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The question is no longer 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.

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ATTENDANCE IS NO LONGER A GIVEN

The pandemic didn't just interrupt in-person events, it permanently changed how people evaluate whether attending one is worth the investment.

BEFORE: HABITUAL ATTENDANCE

- Attendance was automatic, not deliberate
- Multi-day formats went unquestioned
- The cost of being away went unexamined
- Travel was just part of the deal

NOW: DELIBERATE DECISIONS

- Every event competes against staying home
- Multi-day formats must earn their worth
- Time away from family weighs heavier
- Travel costs face real scrutiny

That automaticity is gone. Attendees are more selective, more discerning, and less forgiving of experiences that don't deliver. Yet most evaluation methods haven't caught up to this fundamental shift.

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YOUR TURN

We make dozens of decisions about our events based on what we think we know. But how much of that is verified — and how much is habit?

SHARE IN CHAT:

What's one thing you believe is true about your event that you've never actually verified?



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THE FIVE-LAYER EVENT ANALYSIS FRAMEWORK

Each layer reveals something the others cannot. Strategic clarity emerges when multiple evidence streams converge.

1	HISTORICAL DATA REVIEW	<i>Multi-year trends, attendance, revenue, risk</i>
2	STRUCTURED OBSERVATION	<i>Real-time, on-the-ground event immersion</i>
3	EXPERIENCE SURVEYS	<i>Segmented, intentionally designed perception data</i>
4	STAKEHOLDER INTERVIEWS	<i>Candid voices: board, staff, sponsors, speakers</i>
5	INTERPRETATION & RECOMMENDATIONS	<i>Convergent insights become strategic action</i>

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WHAT IS A “SECRET SHOPPER”?

The term gets used loosely. In retail, it means undercover evaluation against a checklist. In events, it means something different — and is much more useful.

WHAT IT IS

- An experienced meeting professional attending your event as a participant
- Structured observation through the lens of someone with no role in producing the event
- Attention to flow, timing, design choices, and system-level patterns

WHAT IT ISN'T

- A gotcha exercise looking for mistakes
- A mystery shopper grading staff performance
- A checklist of pass/fail standards
- A one-time snapshot disconnected from context
- A substitute for surveys, interviews, or data

Retail secret shopping asks: “Did the employee follow the script?”

Event observation asks: “Is this experience working as a system — and for whom?”

WHAT OBSERVATION REVEALS

Structured observation surfaces findings that other methods miss — simultaneity, sequence, and system dynamics.

EXHIBIT HALL TRAFFIC

Breakfast buffets were placed near exhibit tables to drive morning traffic. In practice, attendees moved directly from buffet to ballroom without pausing. By the time the general session ended, the natural reason to linger had disappeared as attendees needed to get to breakout sessions. Exhibitors experienced two brief surges of people walking past — not stopping.

SCHEDULE DRIFT

A speaker runs five minutes over. That compresses the transition break, so the next session starts late. To make up time, Q&A gets cut short. This happens two or three more times, and by mid-afternoon, the entire day's schedule has quietly fallen apart. Surveys still say the session was a 4.5 out of 5, but observation tells you the schedule lost its rhythm by 2 p.m.



Observation is the layer most organizations skip — but on its own, it only tells part of the story. The real value comes when all five layers work together.

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WHEN EVIDENCE CONVERGES

EXAMPLE: THE AUDIENCE SHIFT NOBODY SAW

In one national association, consolidating multi-year data for the first time revealed that a core audience segment had been declining steadily — even as overall registration held stable. That single finding reframed the entire conversation about content strategy and audience development. It had been happening in plain sight for years. No one had looked.

- 1 **HISTORICAL DATA** Core audience segment declining 3–5% year over year for five consecutive years
- 2 **OBSERVATION** Session rooms for that segment were consistently under-attended
- 3 **SURVEYS** 89% rated the event 4 or 5 stars, but only 63% said they'd attend next year
- 4 **INTERVIEWS** Board members and staff independently voiced the same concern: the event may be outgrowing its original audience

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Strategic clarity emerges when multiple evidence streams point toward the same conclusion — making findings undeniable.

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YOUR TURN

Most organizations rely on one or two sources of event feedback. A fuller picture requires more layers — some of which may be entirely new to your team.

SHARE IN CHAT:

Which of the five layers would be newest or most unfamiliar for your organization (data, observation, surveys, interviews, or interpretation)?



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FINDINGS NOBODY ASKS FOR

CUMULATIVE MISALIGNMENTS THAT EMERGE ACROSS EVENTS

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COMMON FINDING PATTERNS

OVERPROGRAMMING

Dense agendas fragment the attendee experience. Final afternoon sessions can average half the attendance of the previous morning.

SPONSOR VISIBILITY PARADOX

Sponsors invest substantially, yet integration with the attendee experience remains shallow — passive logos rather than meaningful engagement.

SACRED COW INVENTORY

Practices persist because they are familiar, not because they serve their intended purpose. Tradition can constrain evolution.

BACKSTAGE VS. FRONT-OF-HOUSE

Staff experience uneven workloads, unclear role ownership, and communication gaps that eventually surface as attendee friction.

VALUES ALIGNMENT GAP

Gaps between stated organizational values and the actual event experience — attendee accessibility, speaker diversity, and sustainability commitments.

THE DURATION QUESTION

Multi-day footprints may no longer match post-pandemic attendee expectations for time, travel, and cognitive bandwidth.

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WHAT THIS LOOKS LIKE IN PRACTICE

THE CLOSING SESSION THAT NOBODY ATTENDED

The closing session draws barely a quarter of registered attendees. The room is visibly sparse. Exhibits have already been packed up. The event's collective conclusion is undermined, but the post-event survey doesn't surface it.

THE WELLNESS ROOM THAT WASN'T WELL

A designated wellness room turns out to be an empty space with bright overhead lights and no restorative features — no dim lighting, no comfortable seating, no signage explaining its purpose. The intention is right; the implementation misses.

THE REVENUE THAT LOOKED HEALTHY

Sponsorship accounts for more than half of total event income. But when historical data is consolidated, exhibitor revenue fluctuates significantly based on staff attention. The topline looks healthy. The underlying structure is more brittle than anyone realizes.

THE SHADOW CONFERENCE

Attendees network in hotel lobbies and nearby restaurants rather than through structured programming. The real conversations happen without a badge scan — invisible to any evaluation tool that relies on self-reported data.



The most useful findings are rarely the ones anyone set out to look for — they surface when you stop asking "did people like it" and start asking "what's actually happening."

YOUR TURN

The most valuable insights often come from questions no one thought to raise — the patterns hiding in plain sight.

SHARE IN CHAT:

What's a question about your event that nobody on your team is asking but probably should be?



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FROM FINDINGS TO ACTION

THREE HORIZONS OF CHANGE

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REPORT AS A STRATEGIC RECORD

Findings are only valuable if they're accessible when it's time to act. A comprehensive report isn't just a deliverable — it's a decision-making tool.

ONE DOCUMENT, ALL 5 LAYERS
Everything lives in one place — not scattered across Google docs, email threads, and Slack conversations.

MEMORY FADES; THE REPORT DOESN'T
Three months into the next planning cycle, teams default to repeating last year. The report keeps insights sharp when decisions are being made.

STRATEGY OVER CYCLE
Without a record, events get planned on momentum, not intention. The report breaks the endless loop.




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THREE HORIZONS OF CHANGE

HORIZON 1	HORIZON 2	HORIZON 3
<p>Immediate Refinements <i>Quick wins that build confidence</i></p> <ul style="list-style-type: none"> Increase signage density Simplify badge design Align room assignments with data Populate mobile app intentionally Clarify exhibitor deliverables 	<p>Structural Realignment <i>System-level changes over 1–2 cycles</i></p> <ul style="list-style-type: none"> Redesign sponsor integration model Reevaluate governance meetings and timing Introduce shared anchor moments for all attendees Reduce concurrent session density on one or more days Mix session durations to match content depth / attention spans 	<p>Strategic Repositioning <i>Leadership decisions for multi-year impact</i></p> <ul style="list-style-type: none"> Clarify event purpose statement Rebalance revenue mix Reevaluate duration footprint Redefine target audience segments Shift from volume to experience design

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The most common failure point is not a lack of good ideas — it's the gap between knowing what needs to change and building the structure to make it happen.

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OPERATIONALIZING THE PLAN

1 CLEAR OWNERSHIP

One person accountable per priority, with defined RACI or MOCHA roles

2 FIRST-YEAR ACCOMPLISHMENTS

Broad strategic directions translated into success measures and first-year accomplishments

3 90-DAY IMPLEMENTATION PLANS

Concrete steps, assigned owners, and timelines for first-quarter work

4 90-DAY PRIORITIES

Six most catalytic actions visualized as a shared leadership reference tool

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

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TOWARD A NEW STANDARD

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, organizations gain clarity no single tool can provide

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Not every event requires a full-scale analysis every year. But there are specific inflection points when structured review becomes particularly valuable.

IS YOUR EVENT READY FOR THIS?

Attendance has plateaued or shifted in composition

Venue contracts are up for renewal

Sponsor or exhibitor revenue feels fragile

The event hasn't been critically examined in several years

Financial performance is inconsistent

Leadership senses that something feels off

Governance structures are being reevaluated

A merger, rebrand, or strategic shift is underway

YOUR TURN

You've seen three horizons of change: (1) immediate refinements; (2) structural realignment; and (3) strategic repositioning. The question isn't whether your event needs to evolve. It's where to start and what's been in the way.

SHARE IN CHAT:

Think about one change you know your event needs. Which horizon does it fall in and what's kept it from moving forward?



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Q&A AND REFLECTION

YOUR QUESTIONS AND NEXT STEPS

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Q&A

Use the Q&A function to submit any remaining questions.

COMMON QUESTIONS WE RECEIVE:

- **How long does a comprehensive event analysis take?** Three to four months from discovery through final report. The observation itself covers the full event.
- **How is this different from hiring a meeting planner?** Planners produce the event. This evaluates it from the outside with no role in its production. That independence is what makes the findings credible.
- **Will my staff feel like they're being evaluated?** The analysis evaluates the event as a system, not individual performance. Staff often find it validating — it gives data to challenges they've been raising.
- **What if we just had a strong year; is this still relevant?** Especially so. A strong year is the best time to understand why things worked before conditions change.
- **Can we do just the onsite observation without other layers?** You can, but each layer tells only part of the story. It's the convergence of all five that produces findings you can confidently act on.

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SELF-REFLECTION

Take a moment to jot down your answers to these four questions or come back to this slide after the session when you have more time to think.



What's my next major event, and when is it?



What's one evaluation gap I want to close?



Which layer of evidence would add the most value for my organization?



What's one step I can take in the next 30 days to get started?

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SHARE IN CHAT:

NAME 1 THING YOU'LL DO DIFFERENTLY WHEN EVALUATING YOUR NEXT EVENT.

WANT TO GO DEEPER?

Available in June 2026, the full white paper expands on today's content with detailed frameworks, sample observation tools, stakeholder interview guides, and implementation templates.

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LET'S STAY CONNECTED!

OUTSTANDING QUESTIONS?
Contact me via email:
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OR FIND ME ON LINKEDIN 

INTERESTED IN AN EVENT ANALYSIS?
Contact our team:
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FIND ADDITIONAL RESOURCES AT:
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