BEYOND THE CHECKLIST:

IS YOUR CONFERENCE ACTUALLY STRATEGIC?

Tuesday, November 17, 2026
10 - 11 AM PT / 1 - 2 PM ET

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1

TODAY'S PRESENTERS



KARA NACARATO
Senior Director,
Operations



LINDSAY THOMAS
Director,
Client Engagement

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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

- **Chat:** Feel free to connect with other attendees via chat and submit questions to the presenters.
- **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.

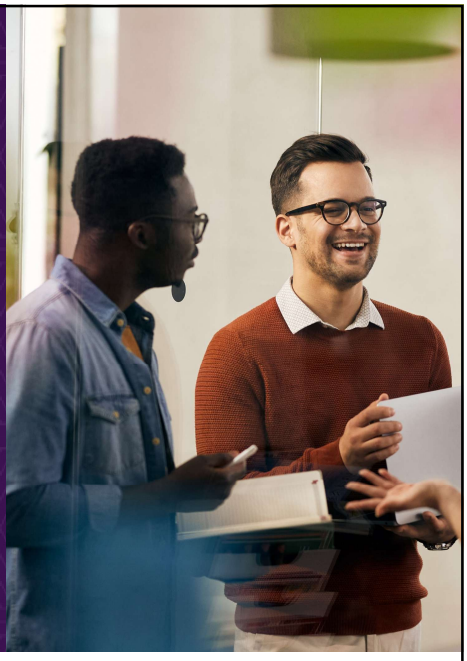
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4

RESPOND IN THE CHAT

WHAT DOES YOUR EVENT PORTFOLIO LOOK LIKE?

1. How many events are you responsible for planning annually?
2. What's your average attendance?
3. What's your biggest event challenge?



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TODAY'S AIMS



RECOGNIZE STRATEGIC CONFERENCE PLANNING

Distinguish strategic conference planning from relying on familiar practices, past events, and assumptions.



APPLY THE FIVE STRATEGIC QUESTIONS

Use questions about purpose, audience, experience, value, and outcomes to evaluate conference planning decisions.



IDENTIFY OPPORTUNITIES FOR IMPROVEMENT

Determine practical ways to better align conference decisions with organizational priorities, audience needs, and intended outcomes.

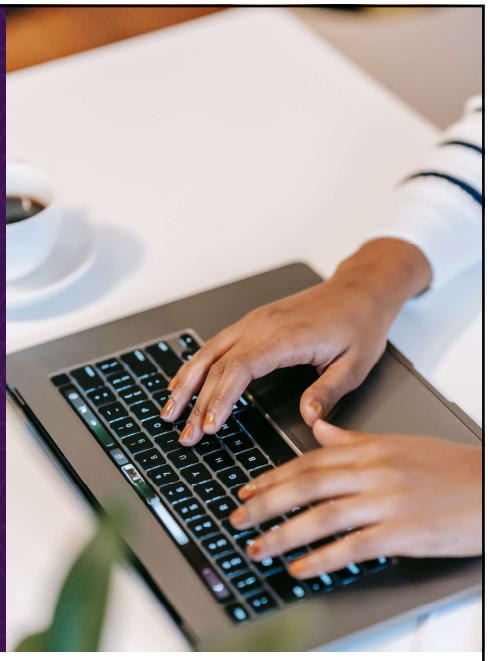
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RESPOND IN THE CHAT

WHEN YOU BEGIN PLANNING YOUR ANNUAL CONFERENCE, WHAT DRIVES YOUR FIRST DECISIONS?

1. Attendance Goals
2. Previous Events
3. Budget
4. Available Resources



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ARE WE PLANNING STRATEGICALLY OR FOLLOWING HABIT?

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HOW ARE WE ACTUALLY PLANNING?

PLANNING BY HABIT

- We use the same venue because we've always used it.
- We repeat the same conference format each year.
- We add activities because attendees expect them.
- We build our event based on the historical budget.

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HOW ARE WE ACTUALLY PLANNING?

PLANNING WITH INTENTION

- We evaluate whether the venue supports our goals and audience.
- We assess whether programming delivers the outcomes we want.
- We design activities around the experience we want to create.
- We allocate resources according to organizational priorities.

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10

THE FIVE QUESTIONS OF A STRATEGIC CONFERENCE

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11

THE FIVE QUESTIONS OF A STRATEGIC CONFERENCE

- PURPOSE – WHY ARE WE HOLDING THIS CONFERENCE?
- QUESTION 2: AUDIENCE
- QUESTION 3: EXPERIENCE
- QUESTION 4: VALUE
- QUESTION 5: OUTCOMES

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12

QUESTION 1: PURPOSE

WHY ARE WE HOLDING THIS CONFERENCE?

- Is the goal revenue, education, engagement, industry leadership, or something else?
- Can we articulate what the conference is supposed to accomplish?
- Do our major planning decisions support that purpose?

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THE FIVE QUESTIONS OF A STRATEGIC CONFERENCE

PURPOSE—WHY ARE WE HOLDING THIS CONFERENCE?

AUDIENCE – WHO ARE WE SERVING, AND WHAT DO THEY NEED?

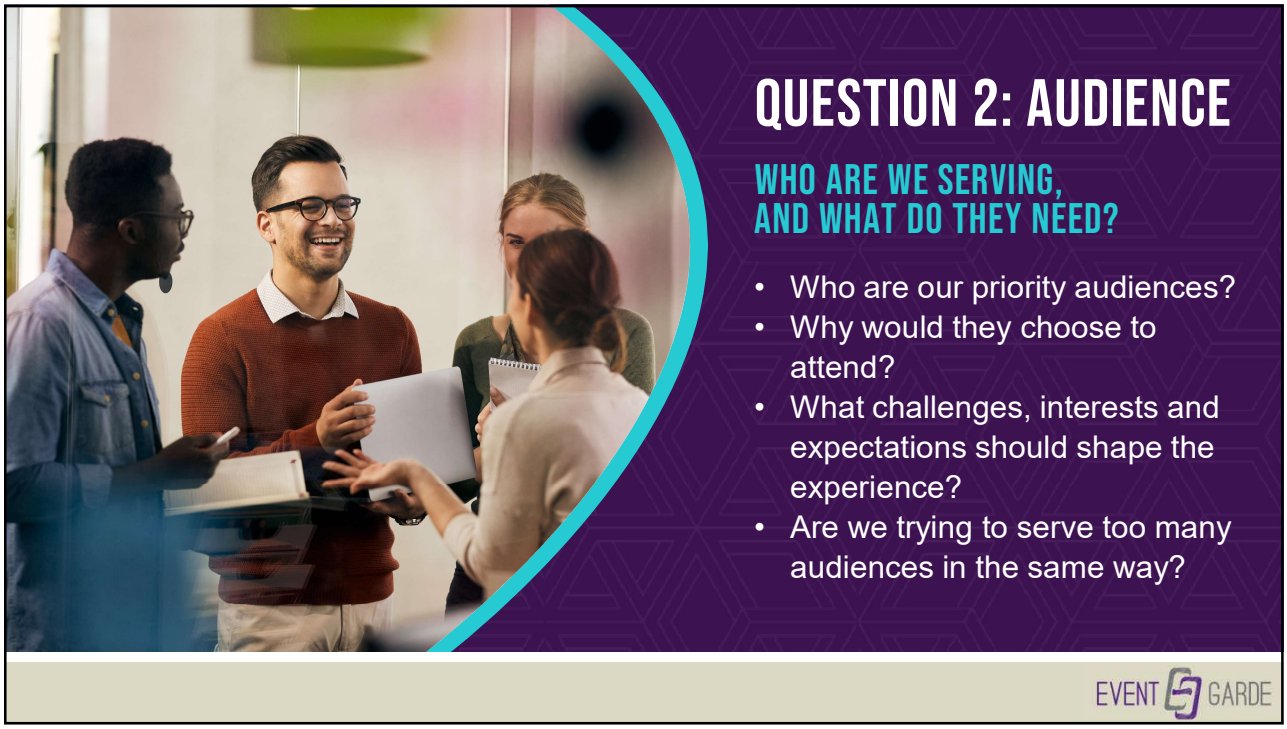
QUESTION 3: EXPERIENCE

QUESTION 4: VALUE

QUESTION 5: OUTCOMES

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14


QUESTION 2: AUDIENCE
WHO ARE WE SERVING, AND WHAT DO THEY NEED?
• Who are our priority audiences?
• Why would they choose to attend?
• What challenges, interests and expectations should shape the experience?
• Are we trying to serve too many audiences in the same way?
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15


THE FIVE QUESTIONS OF A STRATEGIC CONFERENCE
PURPOSE – WHY ARE WE HOLDING THIS CONFERENCE?
AUDIENCE – WHO ARE WE SERVING, AND WHAT DO THEY NEED?
EXPERIENCE – WHAT EXPERIENCES ARE WE INTENTIONALLY CREATING?
QUESTION 4: VALUE
QUESTION 5: OUTCOMES
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16

QUESTION 3: EXPERIENCE

WHAT EXPERIENCE ARE WE INTENTIONALLY CREATING?

- Does the agenda reflect our purpose and audience?
- Are we creating opportunities for meaningful connection?
- Do our activities support the experience we want attendees to have?
- Are we choosing formats because they work, or because they're familiar?

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17

THE FIVE QUESTIONS OF A STRATEGIC CONFERENCE

PURPOSE–WHY ARE WE HOLDING THIS CONFERENCE?

AUDIENCE–WHO ARE WE SERVING, AND WHAT DO THEY NEED?

EXPERIENCE – WHAT EXPERIENCES ARE WE INTENTIONALLY CREATING?

VALUE – WHERE SHOULD WE INVEST OUR TIME, MONEY, AND RESOURCES?

QUESTION 5: OUTCOMES

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18

QUESTION 4: VALUE

WHERE SHOULD WE INVEST OUR TIME, MONEY, AND RESOURCES?

- Which investments have the greatest potential impact?
- What are we spending money on simply because we always have?
- Where could a change improve the attendee experience?
- What trade-offs are we making, and are they intentional?



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19

THE FIVE QUESTIONS OF A STRATEGIC CONFERENCE

- PURPOSE—WHY ARE WE HOLDING THIS CONFERENCE?
- AUDIENCE—WHO ARE WE SERVING, AND WHAT DO THEY NEED?
- EXPERIENCE – WHAT EXPERIENCES ARE WE INTENTIONALLY CREATING?
- VALUE – WHERE SHOULD WE INVEST OUR TIME, MONEY, AND RESOURCES?
- OUTCOMES – HOW WILL WE MEASURE SUCCESS?

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20

QUESTION 5: OUTCOMES

HOW WILL WE KNOW WHETHER THE CONFERENCE ACCOMPLISHED WHAT WE INTENDED?

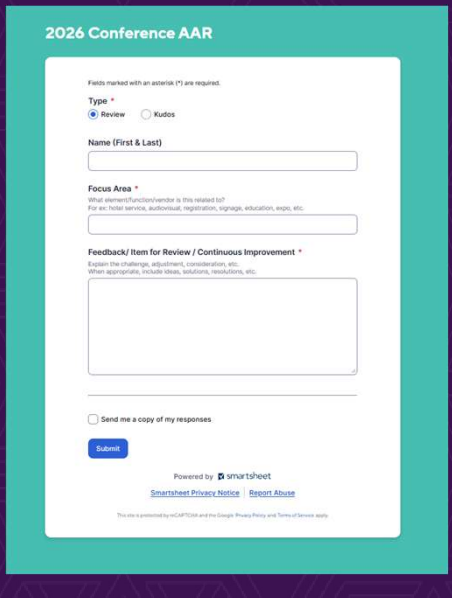
- What should attendees learn, do or gain?
- What should the organization achieve?
- Which indicators would demonstrate progress toward those goals?
- How will we connect conference objectives to meaningful measures of success?

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21

AFTER-ACTION REVIEW

- Focus on learning, not grading.
- Create an open, blame-free environment.
- Celebrate strengths and identify opportunities.
- Use objective feedback.
- Turn insights into action.



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22

TURNING THE QUESTIONS INTO DECISIONS

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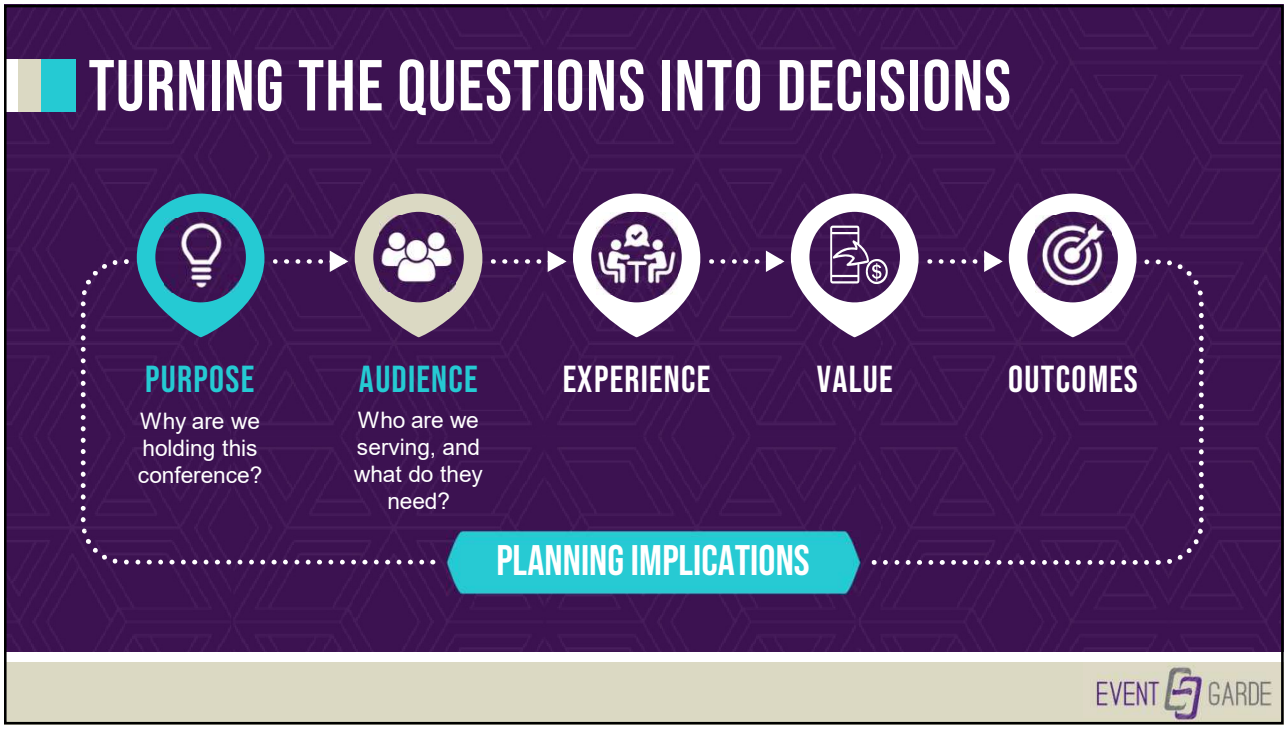
23

TURNING THE QUESTIONS INTO DECISIONS

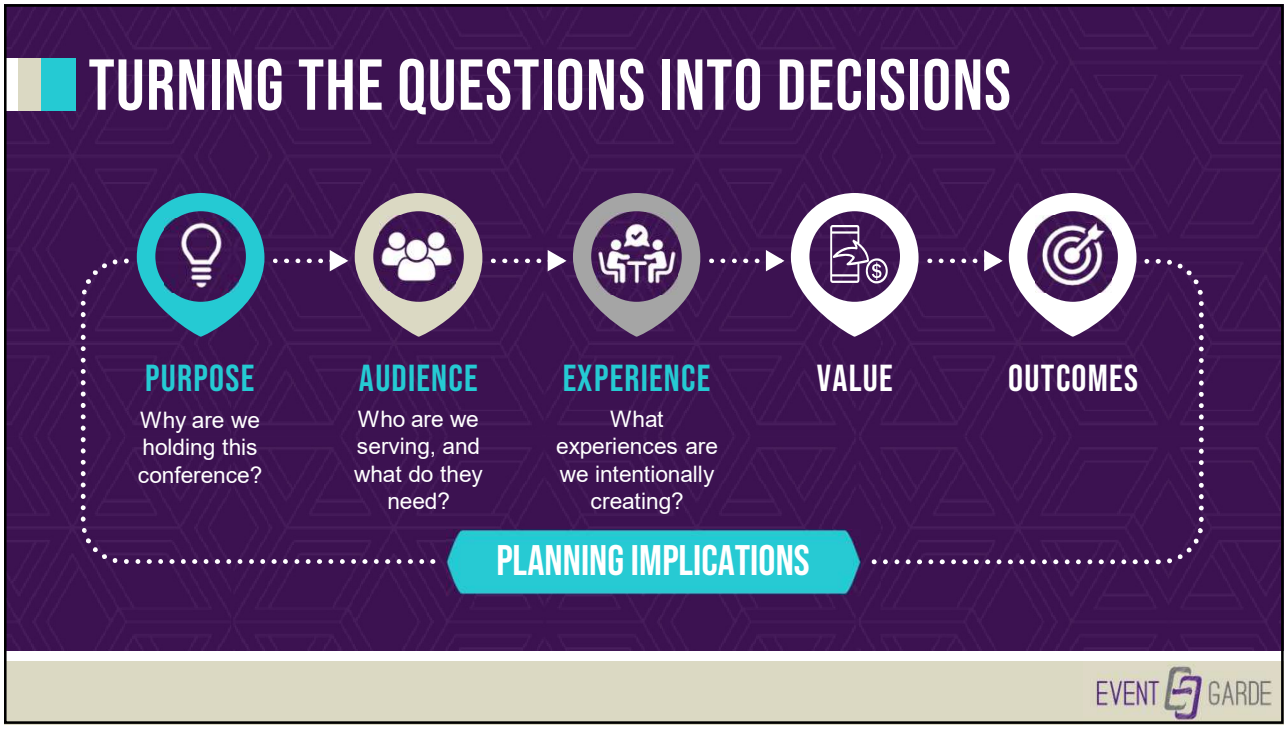


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24


TURNING THE QUESTIONS INTO DECISIONS
PURPOSE
Why are we holding this conference?
AUDIENCE
Who are we serving, and what do they need?
EXPERIENCE
VALUE
OUTCOMES
PLANNING IMPLICATIONS
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25


TURNING THE QUESTIONS INTO DECISIONS
PURPOSE
Why are we holding this conference?
AUDIENCE
Who are we serving, and what do they need?
EXPERIENCE
What experiences are we intentionally creating?
VALUE
OUTCOMES
PLANNING IMPLICATIONS
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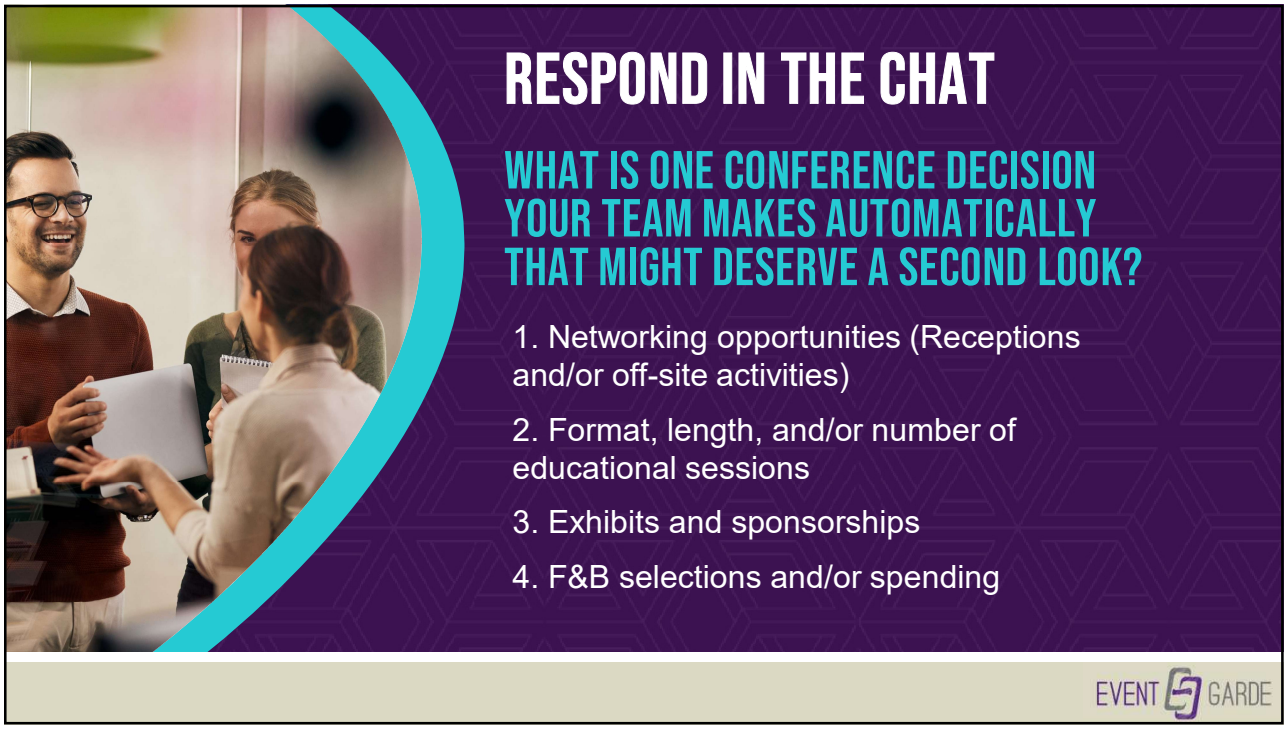
26


TURNING THE QUESTIONS INTO DECISIONS
PURPOSE
Why are we holding this conference?
AUDIENCE
Who are we serving, and what do they need?
EXPERIENCE
What experiences are we intentionally creating?
VALUE
Where should we invest our time, money, and resources?
OUTCOMES
PLANNING IMPLICATIONS
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27


TURNING THE QUESTIONS INTO DECISIONS
PURPOSE
Why are we holding this conference?
AUDIENCE
Who are we serving, and what do they need?
EXPERIENCE
What experiences are we intentionally creating?
VALUE
Where should we invest our time, money, and resources?
OUTCOMES
How will we know whether the conference accomplished what we intended?
PLANNING IMPLICATIONS
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28


RESPOND IN THE CHAT
WHAT IS ONE CONFERENCE DECISION YOUR TEAM MAKES AUTOMATICALLY THAT MIGHT DESERVE A SECOND LOOK?
1. Networking opportunities (Receptions and/or off-site activities)
2. Format, length, and/or number of educational sessions
3. Exhibits and sponsorships
4. F&B selections and/or spending
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THE CONFERENCE STRATEGY ASSESSMENT
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PUTTING IT INTO PRACTICE

CONSISTENTLY, SOMEWHAT CONSISTENTLY, NOT YET CONSISTENTLY

PURPOSE
Can we can clearly explain how our conference supports organizational goals?

AUDIENCE
Do our decisions reflect a clear understanding of our priority audiences?

EXPERIENCE
Is our agenda and attendee experience intentionally designed?

VALUE
Does our investment decisions reflect our strategic priorities?

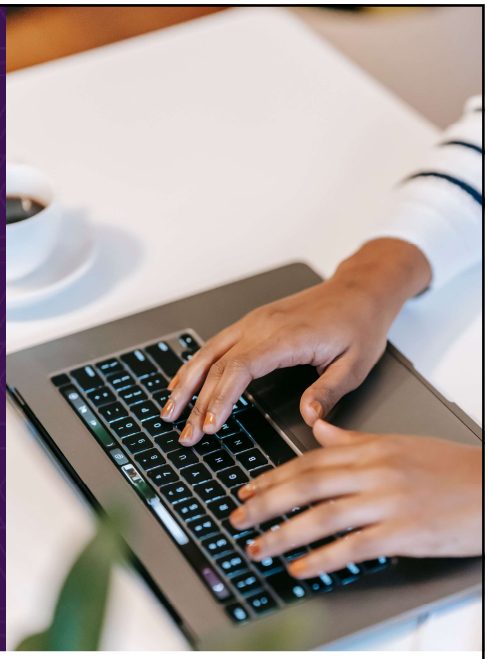
OUTCOMES
Do we define success measures before the conference takes place?

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COMPLETE THIS SENTENCE IN THE CHAT:

FOR OUR NEXT CONFERENCE, ONE THING I WANT TO RETHINK IS _____ .



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WRAP-UP & NEXT STEPS

MAKING THE MOST OF TODAY'S SESSION

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LET'S STAY CONNECTED!



OUTSTANDING QUESTIONS?

Contact us via email:
kara@eventgarde.com
lindsay@eventgarde.com

OR FIND EVENT GARDE ON:

LINKEDIN
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34

RESOURCES

BLOG POSTS

What Comes First in Event Planning: The Budget or the Goals?

Balancing Tradition and Innovation: Reinventing Your Annual Conference Experience

When "We've Always Done It This Way" Is Costing Your Conference More Than You Think

The Importance of Engagement in Your Events…and Why You Can't Afford to Ignore It

The Conference Is Over. Now What? Why the Work Isn't Quite Done

EVENT PLANNING TOOL

Designing Your Ideal Event: A Practical Tool for Planning & Partnering

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35

ADDITIONAL RESOURCES

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

1. Evaluate attendee experience
2. Identify hidden gaps
3. Assess experience shortfalls
4. Make informed improvements



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36



37