



John Matthews
Founder & Chief Event Strategist
KWM Consulting

610.662.5622
www.KnowWhatMatters.net
info@knowwhatmatters.net

10 Questions To Transform Events, Meetings, and Stakeholder Engagements

FACT: Relationships are essential currency for organizations.

Whether your business is sales, information, products, or service – and regardless of whether you’re in the for-profit or non-profit space, **connecting with and strengthening connections with your clients, customers, and other stakeholders is integral for success.**

With a *new normal* for in-person meetings and engagements still in formation, establishing your organization’s response and strategy for **authentic, meaningful, and results-oriented** events is likely a work in progress.

While the landscape is evolving, one thing is clear: biding time until things go back to the way they used to be will not serve your team or your business. The truth is, **the new normal we’re looking for and creating is going to be quite different from the landscape of even 6 months ago.** There will certainly be new opportunities and new approaches – and some practices you’ve adopted and relied upon will need to be re-engineered or possibly even discarded.

Helping teams **plan, execute, and leverage events and meetings that drive innovation, fill pipelines, bridge collaborations, and support goals** is the mission of my firm, **KWM Consulting** (know. what. matters.)

Drawing upon my significant experience transforming events, I’ve curated a list of key questions for leaders and event/meeting strategy teams to consider as they review and adapt their engagement plans for Q3 and beyond.

1.

Can one large annual event achieve our goals...or are we better served by developing a comprehensive strategy that builds upon our major event?

All events and meetings, regardless of scope, size, or budget, are most effective when they are part of a larger, overriding strategic plan that is aligned with your organization’s goals and targets.

Staying engaged with clients/customers through strategic events, meetings, and communications is the **WHY**. From here, you then turn to the **WHAT** and **HOW**...i.e., large meetings, smaller meetings, engagement events, outreach plans, and more, with each event designed to support goals and success targets.

Large “landmark” annual events certainly have a role to play within the context of an effective engagement strategy – as do smaller, customized events that are curated to specific audiences and goals..

Author’s Note: *There is significant disruption in the meetings and events space right now (Q3, 2020). Location-dependent (in person) events are on hold for the most part, and organizations are responding in a variety of ways.*

Knowing what matters: *Organizations that pivot, adapt, and seize opportunities position themselves for success...improved bottom lines, engaged clients, optimistic employees, and successful strategies for weathering uncertainty and arriving at the new normal in a state of strength, optimism, and resilience.*

I offer these following questions to help shape your continued engagement strategies around events and meetings – for today’s adaptations and pivots as well as for the long-term.



2.

Which virtual meeting platform should we use?

While this is here as question #2, it actually belongs near the end of the list. Selecting your platform and other technical tools is best done following in-depth discussions around your strategy, goals, defined client/participant experience and outcome targets. In addition, your content and meeting outline provide you with the functionality specs you'll need for evaluating vendors.

Your goals drive your tech platforms and tools – and not the other way around.

3.

Who is our audience?

The key here is to be specific and narrow. **Drill down to move beyond a general category of “clients” or “prospects” to the exact group that aligns with your goals.**

For example, move beyond “prospects” to “*enterprise clients who have already purchased A, B, or C*” or “*professional services firms in the construction/engineering space with over 50 employees*”.

Trying to make one event be all things to all people dilutes or minimizes overall impact and results.

4.

What do we want to achieve for our organization/team?

Successful, strategic, and organizationally aligned events/meetings move beyond being ‘fun’ or ‘interesting’. Attendee engagement and experience are critical considerations (more on that in #5), and I maintain that striking a **win-win** between these and your own goals and objectives is possible, reasonable, and the **stakeholder engagement sweet spot**.

5.

What do we want attendees to experience/achieve?

Virtual meetings and events, while potentially very cost effective and productive, are up against a significant challenge: **the battle for attention and continued participation**. With many people working virtually, the opportunity and draw to multitask is ever-present. **Events and meetings MUST be relevant, engaging, timely, and focused.**

All too often, organizations default to a one-way communication stream – from screen to listener. Unfortunately and honestly, this is generally not very engaging or compelling. So your team is called to innovate on ways to **shake things up**, to **capture and maintain attention**, and to make what you're talking about so **relevant and irresistible** that participants voluntarily silence their phones and turn off their email alerts.

Determine what you want your customers' call to action to be once the meeting or event has concluded. This provides immediate insight for planning, materials, and timing – and also puts shape to your team's post-event follow-up.



6.

How does this meeting/event fit into our overall sales, marketing, and development strategy – and – who needs to be a part of the planning?

Meetings and events created and launched without cross-functional insights and involvement may not provide the results and impact they could have had with collaboration. If your event/meeting team isn't partnering or collaborating with your organization's sales, marketing, and development strategy, along with its sales/success targets, then I respectfully suggest you hit 'pause' and revisit.

Wrapping your sales, marketing, and/or business development teams into the process increases your ability to fully leverage the event and drive success metrics. These people are your in-house experts on what clients/prospects/stakeholders want, what their pain points are, what's keeping them up at night, and how they most enjoy connecting and learning.

Once you've identified who should be part of your planning, it's important to work to bring everyone together under a shared vision and purpose. This leads to incredible synergy, a unified communication plan, and minimal amounts of conflicting information or confusion. This unified approach across internal teams and functions really contributes to a great customer experience!

7.

Is our content compelling, on point, and meaningful? Are we delivering it in the most effective and engaging way?

If you've gone through the prior 6 questions, you're likely on track to great content already. Sometimes, though, mission creep happens – and content and agendas become diluted or overly (and unnecessarily) complex. Checking in on the content throughout the process to ensure it's still **focused and relevant** is important.

In terms of delivery, one-sided, outbound presentations tax participant attention. So the challenge is to **consider and incorporate innovative and interesting ways to deliver content.** Ideas include interview formats, polls, scheduled brain breaks and check ins, pre-taped client spots, breakouts, virtual reality and more help to keep people active and involved.

8.

What should we be measuring and how will we gauge success?

There are multiple ways to gauge success: continued participation rate, requests for more information, evaluation forms, sales, appointments, and/or new subscribers are just a few examples. **Dedicate time for discussing how success will be measured and then create an effective and easily deployed tracking system for evaluating both your event and post-event activities and initiatives.**



9.

Who owns responsibility for the planning process and/or decisions?

This is really about **governance; how processes and decision-making frameworks are established and used?** While not the most exciting part of meeting and event strategies, these structures facilitate solid decision making and forward momentum, minimizing the chance of getting caught in the cycle of revisiting and relitigating decisions – both of which waste significant time and resources. Understanding your organization’s governance and approval mechanisms will streamline your team’s energies and pave the way for success.

10.

WHO does WHAT on event day (aka Run of Show)?

The day of your event, **you need dedicated people with clearly defined roles and responsibilities to ensure things go off without a hitch.** In addition, having backups and a few extra people able to step in to troubleshoot is worthwhile. Practicing technology before hand and having back up plans and contingencies are also keenly important – they will save you immeasurable amounts of stress and confusion on your event day.

About KWM Consulting:

KWM (know.what.matters.) Consulting is your strategic meeting, events, and stakeholder engagement partner for transforming your initiatives from ‘good’ to GREAT by ensuring your outreach is aligned with and supports your business and team goals and success. Through its 4 service areas (Strategy Development, Project Management, Meeting Facilitation, and Coaching), KWM Consulting infuses high energy and positive momentum through its proprietary decision-making and project management framework.

About John Matthews:

With a track record of transforming corporate meetings and events into strategically-aligned and results-focused initiatives that drive business success for one of the world’s leading tech companies, John brings a depth of experience to KWM Consulting clients and their stakeholder engagement plans. Known for his ability to bring diverse groups together under a shared purpose and vision, he lifts teams and organizations to reach new levels of success. He is also the founder of Ride Hard Breathe Easy, a 501 (C) (3) organization established in honor of his mother and dedicated to providing support to Philadelphia-area lung cancer patients and their families. He donates 20% of all KWM Consulting’s engagement fees to this worthy cause.