

Discovery Mindset Guide

Pre-Event Planning to Drive Business Outcomes





The Discovery Mindset

At the beginning of every event journey, event planners need to ask important questions and collect necessary information to meet event objectives. At Encore, we like to think of this as the Discovery Mindset: the essential framework you need to craft an exceptional event.

The Discovery Mindset helps us understand in depth what we can learn from your event's successes and incorporate these wins into future planning.

To outline the path, consider us your co-designers: We'll start by thinking critically about your event to add important context to your choices. Then, we'll provide the Pre-Event Checklist for you to consider. The result you'll walk away — and move forward with — is an effective tool to kickstart the planning process that results in remarkable events with reportable results you'll be proud of.



Thinking Deeper: Context to Inform the Pre-Event Checklist

We know each planner has their own method of organizing during the pre-production phase. To dive into the Discovery Mindset, we encourage you to “think deeper” — to pull all your professional, event, and organization knowledge to the forefront to help frame your future choices differently. Let’s consider the basic building blocks of your event with additional questions that challenge and frame your planning process in a new, more engaged way.



Why

Why are you planning this event?

Consider this: What is the purpose of the event? Is it to generate revenue, increase membership, boost morale, increase ROI, etc.? How do I ensure event participants will come back for the next event? What choices should I make to directly impact ROI and ROE?

Who

Who is your audience?

Consider this: What are the demographics of my event participants (generational breakdown, industry, etc.)? What does survey data tell me about what they like, want and need? How can I design the event within budget to reach participants in an impactful way?

What

What are your goals?

Consider this: How would my stakeholders define success at this event? How are my participants' needs aligned with these goals? How am I going to measure these goals?

How

How are you going to achieve your goals?

Consider this: How can I utilize an event brief to demonstrate the method of meeting these goals? Which partners (internal stakeholders, suppliers, etc.) should I share the event brief with and when? What steps / actions do I need to take to achieve these goals? How much time do I need to assemble the team that will bring this event to life?



Business Objective: The Organizational or Business Goal of the Event

Now that you have an overview of the information you'll need to create an event with purpose — and measurable outcomes — use this Pre-Event Checklist to make sure you've covered all the angles. This checklist can help you confidently organize the ways you'll create ROI for your stakeholders and ROE for your event participants.



Business Objective Checklist

- ✓ Know what the goal is for the event and what success looks like
- ✓ Stakeholders: Know who is involved and how they benefit
- ✓ Institute a plan to demonstrate value to your stakeholders for continued buy-in
- ✓ Institute a plan to measure business or organization KPIS
- ✓ Understand what the risk is if the event does not happen
- ✓ Determine how participant data (registrant profile, event history, survey data) will be used to affect decision making

◆◆◆ **Consider this:** Each item listed above supports your ROI. Consider the different ways business goals vary depending on whether you're hosting a networking event, intend to rev up a sales team, conduct training and education sessions, etc. Does the allotted budget allow for the experience your stakeholders have envisioned? Determine the effects of creating this event, including what the event changed for stakeholders and participants, and at what cost.



Key Performance Indicators (KPIs): How You Define Success and How to Measure It

Key Performance Indicators Checklist

- ✓ Determine what you hope to achieve
- ✓ Develop tools to capture KPIs
 - ✓ External: surveys, social media data, media highlights
 - ✓ Internal: team and executive feedback
- ✓ Report what you did achieve and what you didn't
- ✓ Determine if you met your budget goals (over/under)

◆◆◆ **Consider this:** Measure ROI by tracking when the participation goal is met, profitability of the event, number of registrations completed. ROE is measured by asking questions before, during and after the event to understand the efficacy of the event's choices.



Measurement Plan: Risks, Assumptions, Tracking Success, Future Action

Measurement Plan Checklist

- ✓ Determine what the risks are and understand what could go wrong
- ✓ Create / co-design a risk mitigation plan with the venue, suppliers, DMO, etc.
- ✓ Develop and execute a plan to track success

◆◆◆ **Consider this:** Ask yourself if you've considered all the elements you may need a backup plan for. To report your measurement system, know how you'll organize your data and determine your plan to report it.

Check-in Time: Make sure your business objectives, KPIs and measurement plan are present in your RFP. In particular, acknowledging the risks associated with your event plan is essential when collaborating with potential vendors, so that plans can be achieved regardless of risk.



Your Event Participants: What They Need

Participant Needs Checklist

- ✓ Determine and identify who your event participants are
- ✓ Identify their educational, personal and communication needs, and plan solutions to address
- ✓ Execute a comprehensive event plan that considers all participant needs
- ✓ Discuss these needs with your partners so all parties are involved in achieving your participant goals

◆◆◆ **Consider this:** Think about how different generations like to be engaged and how they learn. Explore how Gen Z might need different opportunities to receive and process information than Baby Boomers, etc.



Experience elements: Design and Content that Drives Event Engagement

Experience Elements Checklist

✓ Review the content your participants will engage with:

✓ Event theme

✓ Brand and branded experience

✓ Presentations, education, display content

◆◆◆ **Consider this:** Your event's content has the power to influence what participants feel and think. Ensure your content engages them by considering the demographics of the event audience. Cater the shared key messages to participants. Explore the ways in which the quality of your content has the ability to shape perception of your customer's organization or business.

Check-in Time: Have you included your vendors and internal partners in the process of designing your event experience? Consider the context: Your decisions about location, venue and experiences all factor into creating the content you'll share with participants



Moments That Matter: Meaningful Moments to Create at Your Event

Experience Elements Checklist

- ✓ Identify and create 3-5 peak moments (networking opportunities, invite-only experience, motivational speaker, etc.) for your event
- ✓ Identify and amplify critical mini experiences
 - ✓ Live demos and product launches
 - ✓ First-time team meetings and new business partnerships

◆◆◆ **Consider this:** Contemplate who will be in the same room who normally wouldn't have facetime with each other. Ponder how you'll forge new connections between which participants. Explore what can be celebrated, called attention to and announced with intention.

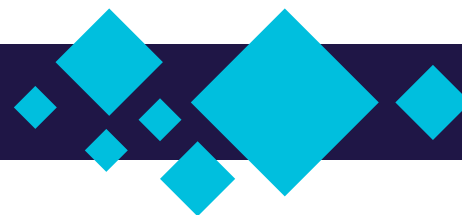
Check-in Time: Site visits are a crucial time to share these moments you plan to create, as you'll want to ensure that the venue has the ability to effectively host them that upholds the vision you and your stakeholders have agreed upon



Production Partners: Your Discovery Mindset Co-Designers

It takes thought, intention and action to create events that transform. Collaborating with a full-service production partner can help you achieve your desired outcomes. With over 85 years of experience and more than 400,000 events planned and executed across 21 countries last year, we know how necessary it is to evaluate the event experience. Encore can help you define your success metrics and determine and mitigate risks.

When you're ready, engage with a trusted partner and get involved at the start: Early communication and partnership results in better events. With the Pre-Event Checklist in hand, test it out at your next event. Measure what matters and be ready to report the results for your future success.



[Chat with Us!](#)