

Events Management at EF Corporate Solutions

Ida Lehdonpolku



Author Ida Lehdonpolku	
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<p>EF Corporate Solutions, which provides language training for organizations, annually organizes local and global events for business clients all around the world. The event planning and organizing process of local events relies mostly on Country Managers, and was detected to be quite unstructured. The numbers of attendees and cancellation rate were widely raised as the main concerns in events management while I was working at EF Corporate Solutions. Consequently, as the topic was alluring, the thesis was decided to construct a useful tool for managing events at EF, and aligning practices in various countries. Before completing the final product, a manual, the research aimed to find more specific current practices and bring alternative solutions for increasing the number of attendees and the effectiveness of events as sub-research questions.</p> <p>The event life cycle has been considered from a project management perspective and the thesis as well as the manual follows the structure of five separate phases: initiation, planning, mobilizing, staging and closing. The guide book will be managed and updated by the Web Publishing and Events Manager at EF. The final product is mostly intended to be distributed for Country Managers and Marketing Managers of the organization in several different locations.</p> <p>In order to set sensible limitations for the study, the research area was decided to be the Northern Europe Region, which have comparable markets, and the concentration would be on local events. The qualitative research methods: semi-structured interview and non-participant observation provided valuable information of current event management practices in the company. In October 2018, interviews were conducted with Country Managers of Finland, Germany, Netherlands and Sweden virtually, with an aim of gaining more information of their struggles as well as their best practices. The non-participant observation method provided with a detailed description of the event process in Germany 2018, and resembles other events organized at the company.</p> <p>The other main issues detected during the research, besides a number of attendees and unstructured process, were mainly the lack of communication and insecurity regarding the real benefit (return on investment). Consequently, the manual provides the general instructions through all phases providing useful tools including event tracking instructions. The sub-research problem `how to attract more participants`, was concluded with a sentence: `more important than high number of attendees is to attract the relevant people`. However, a great number of relevant attendees can be achieved by an early-start in planning, active communication, and compelling content. The effectiveness of events is ensured by following the structured event process, and decisions that are made that follow the real objectives of the event.</p> <p>The study concentrated on collecting knowledge from inside the company, and can consequently be developed to survey events from clients' perspective. Feedback from clients seemed to be lacking, the following surveys could dive deeper into more specific issues detected such as feedback level, or conduct an interview survey that asks clients and prospects, what would make them more attracted to EF events. With the help of the manual, event organizers can manage events so that they are better related to sales and guide their actions more efficiently towards objectives that ensure better a return on investment.</p>	
Key Words Event Management, Events Manual, Corporate Events	

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1 Introduction

Events are usually defined as purposive gatherings of people. According to some definitions it is a planned occasion; on the other hand it doesn't have to be planned. The thesis introduces event categories, but mostly addresses to Corporate Events. The framework introduces key considerations when planning a corporate event with the aim of bringing up critical parts relating to business-to-business events organized by EF Corporate Solutions. The thesis aims to provide a comprehensive description of an organizing process in order to structure and ensure all the key elements are considered.

EF Corporate Solutions, language training service provider organizes annual local and global events for business clients all around the world. Most of the events are organized in co-operation with a business partner, Company X, which provides leadership training. The event planning and organizing process of local events relies mostly on Country Managers, and they were detected to be quite unstructured. While I was working at EF Corporate Solutions, I took part in event organization of smaller-scale breakfast seminars and annually organized main seminar. The numbers of attendees and cancellations were raised to be the main concerns widely across events management by EF.

Consequently, as a part of this thesis it was decided that I would also construct a useful tool for structuring events at EF, and aligning practices in varying countries. Event management as a potential future expertise was attractive and the thesis topic was built around the author's interest and the needs of the company. Before conducting the final product, a manual, the research aimed to search for more specific current practices and bring alternative solutions for increasing the number of attendees and the effectiveness of events as sub-research questions.

Events in Finland were already well-managed so the concrete need seemed to be more in structuring the process and increasing the number of attendees in other countries. However, it was strongly believed that by following structured process and considering all key elements, EF teams would also be able to attract more participants to their events.

The framework, based on the literature of professional event organizers, concentrates on collecting guidelines for the step-by-step instructions of the manual. The theory covers different event types, and the life cycle of an event from a project management point of view.

The empirical section of this thesis addresses the sub-research questions of: How to attract more people to attend; or decrease the cancellation rate, and how to develop the effectiveness in relation to sales. The research methods used in the study involved semi-structured interview conducted with Country Managers in Northern Europe region and non-participant observation which provided more detailed information of the current practices.

The final product of this thesis is an operation manual for event organizers in the Northern European region. The manual provides country managers and other event organizers at EF Corporate Solutions with step-by-step instructions, and best practices for organizing an event. The thesis and the manual follow the structure of a five phase event project as follows: Initiation, Planning, Mobilizing, Staging and Closing.

While events seem to be quite successful in this company, some issues such as the number of attendees, and late cancellations, are clearly visible. The issues identified are very specific, but with general instructions on all the steps, the manual aims to focus on these problems, and make the process smoother.

2 Event process

Events have been integral parts of society across a variety of cultures. (Pielichaty 2016, 2-3.) There are various definitions for the word 'event'. An event can be defined as a public assembly for different purposes such as education, marketing, celebration and reunion. (Event Education 2019.) Some definitions describe an event as a planned and organized specific occasion, while on the other hand the term 'event' could also be defined as follows; 'Events are purposive gatherings of people.' According to the latter definition an event need not have to have been planned at all. Many successful events have been, for instance, spontaneous displays of ritual. Ultimately events simply need people to attend so that it can be justified as a gathering of people. There is no such thing as an event without people, although attendees may vary depending on the type of the event.

It is necessary also to make the distinction between an attraction and an event. For instance, historical attractions might be used as venues for an event, in addition to possibly organizing an event of their own but only for a limited period of time. Events vary from other, more frequent, organizational activities in a sense that an event has a clear beginning and end.

Because they are one-off occasions, events are held in different locations, at different times, and for different purposes. Even the same event organized annually might differ noticeably in its features. It can therefore be argued that these characteristics make every event unique. (Bladen, Kennel, Abson & Wilde 2012, 3-8.)

2.1 Categorization of events

While the word 'event' has varying definitions, events can also be classified in multiple different ways. For instance they can be categorized by type, size or context.

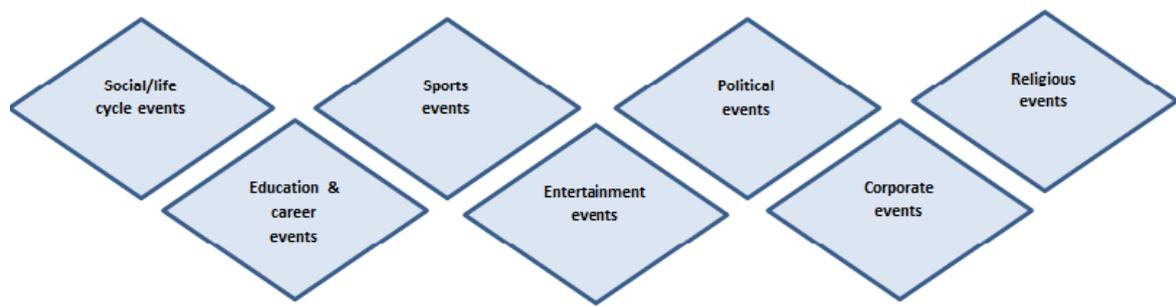


Figure 1. Event Categorization (Event Education 2019.)

One way of classification by event type as presented above, provides categorization of varying events in a manner that the content of the event is clear. Social/ life cycle events include occasions such as birthday parties, engagements, graduation days, bachelor parties, retirement parties, weddings, funerals and similar occasions. Education and career events consist of job fairs, education fairs, workshops, seminars, competitions and debates, while the World Cup, the Olympics, the Wimbledon and marathons represent examples of sports events. Festivals, concerts, fairs, fashion shows, award functions and stage shows pertain to entertainment events. Political events can be political processions, demonstrations, political functions or rallies. Corporate events are comprised of meetings, conferences, incentives, exhibitions, product launches, buyer-seller meetings and road shows, and this particular event type will be presented in more detail in the next chapter. Religious events can refer to religious processions, religious festivals/ fairs, Kathas, Diwali fairs, Pravachan and Dusherra fairs. Any kind of event can be turned into a cause-related event or a fundraiser. (EventEducation 2019.)

As the aim of this thesis is to concentrate on business-to-business events, the following chapter describes the meaning and categorization of corporate events.

Live events are nowadays an influential part of the marketing strategy for companies in B2B as well as B2C. (Alroy14 February 2019). Corporate events are recognized as the most influential way to achieve business goals. Face-to-face meetings between colleagues, actual clients and prospects are drivers of business success. Whether it is a half day seminar for a few managers in a local hotel or a trade show for thousands of attendees, both are counted as corporate events. However, the range of corporate events is enormous. (Beech, Kaiser & Kaspar 2014, 56.)

Fundamental to all business events is the basic objective of facilitating communication between participants. Accordingly, they may be defined as planned time-bound events that bring together colleagues from similar industries, professions or interest groups to connect with each other in order to share ideas and information, to make decisions, or to simply enjoy and celebrate their work-related achievements. While most business events have multiple purposes, the fundamental objective is almost always to change the behavior of the participants in some way, through the facilitation of education, negotiation, inspiration, motivation, celebration and business connections between participants. (Davidson 2019, 10.)

Corporate events as well as other types of events can be categorized in varying ways such as by the type of the event, attendees, or primary purpose. In instance where corporate events are categorized by the type of the event the following can be used: annual general meetings where shareholders are invited to hear annual results, sales meetings, staff trainings, product launches and incentive trips.

In case corporate events are categorized by who the attendees are, there are three categories: internal, external and mixed events. Internal events are organized for the company's employees such as strategy meetings, staff training sessions, team-building days and incentive trips whereas external events are organized for people who are not employed by the organizing company. External events can include shareholders' meetings as well as product presentations. Mixed events include both internal and external attendees and this category includes events such as corporate hospitality days and product launches.

Corporate events can also be categorized based on the primary purpose of the event as follows: legal/constitutional, commercial and social events. Legal/constitutional meetings can be internal or external and are held for the objective of, for instance, voting on business strategies or electing company directors. Commercial events are designed to boost sales directly. It can be a training session for the company's sales team or new product presentations to potential and existing clients. Social events are held to strengthen bonds between colleagues, representatives of the company or its key clients. The social events category would therefore include team-building events, management retreats and corporate hospitality days. (Beech & al. 2014, 56-58.)

According to Catani (2017, 22) corporate events can also be classified as three types of events; experience events, beneficial events, and communal events. A good event is often a mix of all three, although it is important to highlight one. In beneficial events the important features are learning, rewarding and networking and this best relates to the events organized by EF.

Primarily, an organization's motivation for organizing seminars and events for their clients is to strengthen the connection with them, get more business and enhance brand awareness. Companies should present the events as they are, because customers are aware of the company's goal to sell and usually admire any honesty and straight forwardness. Even though organizations create interesting experiences for customers to make more sales, in an ideal situation both parties achieve what they want. Well organized and interesting targeted

events always attract people to attend. Companies should put an effort to the planning phase and professional execution. (Catani 2017, 22-23).

2.2 Events management from project management perspective

Nowadays the most common way to approach the event process seems to be from a project management perspective. In the past organizations have failed to understand the usefulness of project management and its tools when it comes to organizing and planning an event. However corporations are starting to catch up on the trend. Events have a clear beginning and an end, and every event is unique with a change in the environment, usually a change also in team as well as a certain fixed budget and the required coordination of tasks, all these characteristics align strongly with the features of a project. (Poetscher 2018.) Project management and event management also share other common features such as having a temporary nature, unique outputs, outcome based and execution by teams. Even though projects and events have many similarities, unlike projects, events are executed and consumed simultaneously, co-created with participants with adjustments made during execution and executed on specific dates that cannot be adjusted. In either case, both events and projects involve the possibility of unforeseen risks and noticeable unfamiliarity. (Pielichaty 2016, 24.)

Project management tools are useful for events as they support coordinating the process in order to help integrating and disseminating the event information, help selecting and implementing effective solutions to manage the project and can simplify the execution process. Common project management tools can help the people involved to meet milestones during the various phases of the life cycle.

A project manager is responsible for small, as well as large-scale decisions that may directly impact the project. As a Project Manager has multiple responsibilities, it is recommended that they get familiar, and use a variety of tools in the planning process. (Haughey 2016.) Project managers are not exclusively found in the hospitality industry; this position is also found in almost every other industry. A project manager bears responsibility for a successful initiation, planning, design, execution, monitoring, controlling and closure of a project. A project manager is required to have general management skills, ability to ask profound questions, detect unstated assumptions, as well as conflict resolution skills.

According to Silvers & Nelson (2009) the event project cycle is defined in five separate steps of the event as described in the figure below; initiation, planning, mobilizing, staging and closing. These phases will be used to structure this thesis and the manual in order to clarify the different steps in event planning.

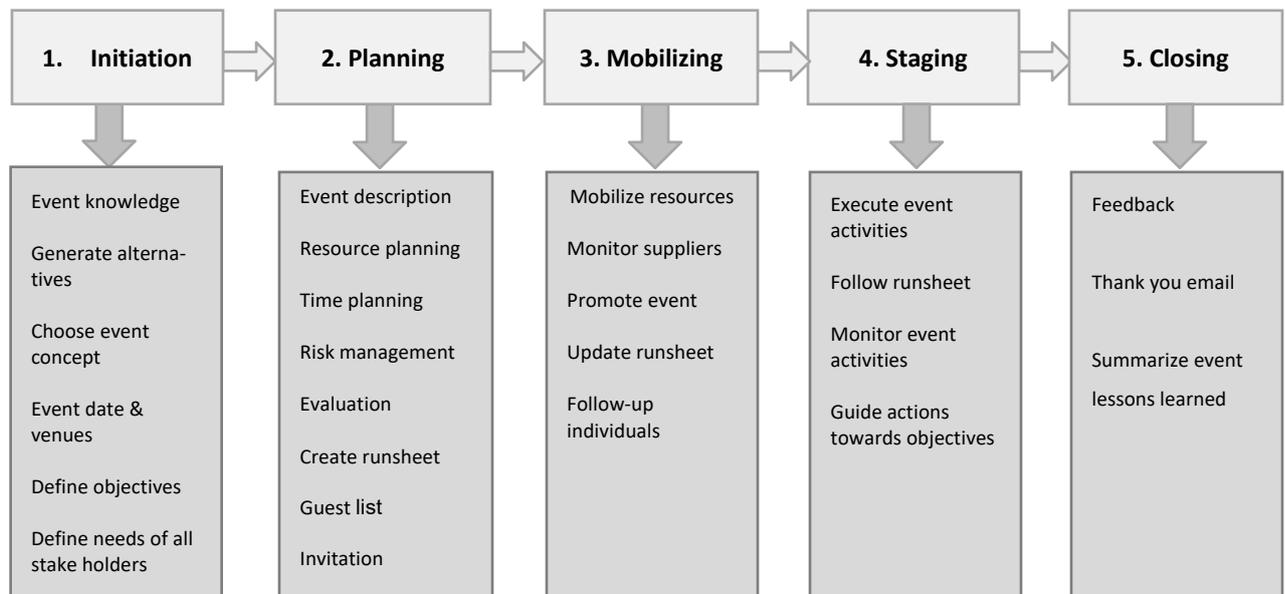


Figure 2. After Silvers and Nelson, event project cycle (2009.)

2.3 Project manager

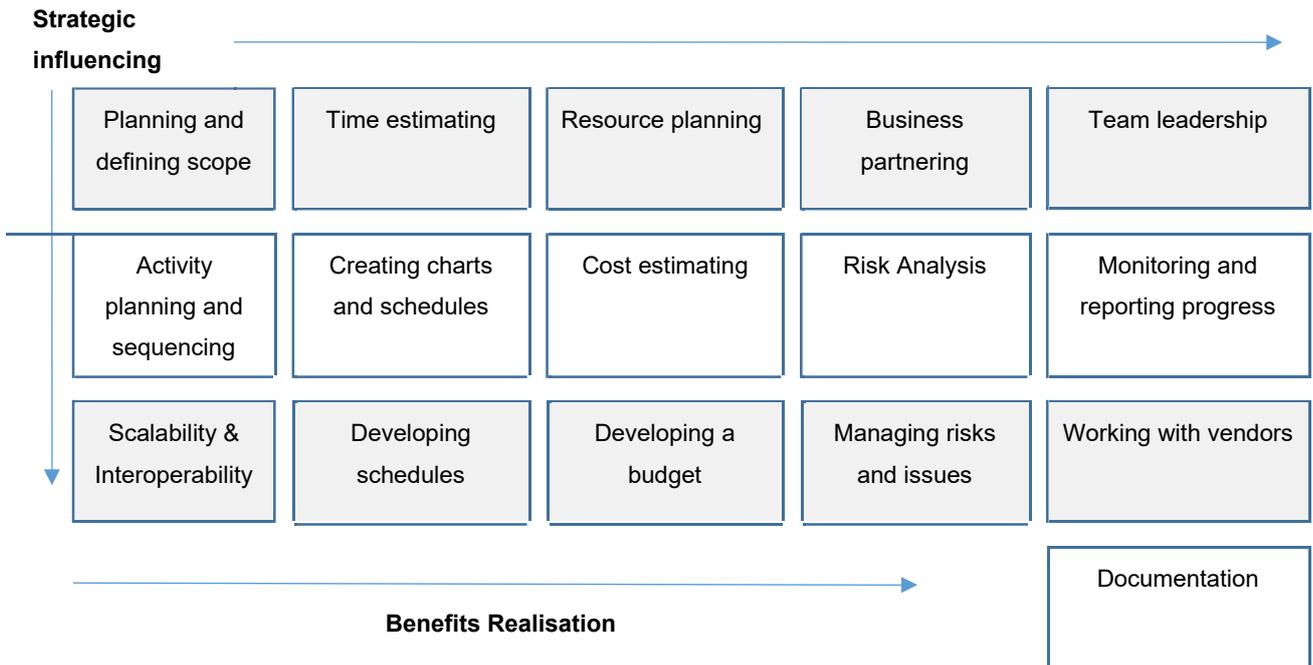


Figure 3. Responsibilities of a project manager (Haughey 2016.)

As presented above, a project manager must possess multiple skills and be responsible for an extensive list of tasks. One of the important responsibilities of a project manager is strategically influencing their team, guests, and business partners. A project manager may plan the activities and the scope, keeping in mind how to persuade the clients in the most effective manner. Team leadership includes organizing the work force, and dividing tasks for the team.

One of the key duties of a project manager is recognizing the risks that directly impact the likelihood of success. These risks must be measured throughout the project cycle. A vital responsibility of a project manager is reducing risks significantly. This is done through encouraging the project group to communicate openly, and ensuring that every participant has the freedom to express their concerns and opinions. (Haughey 2016.)

A successful project manager is effective, and can also read social situations well. Guests want attention, but do not enjoy someone constantly breathing down their neck. A good host of an event is also positive and cheerful. Positivity is contagious (Catani 2017, 104-105.)

2.4 Steps of the event

When organizing events, various details warrant careful step-by-step consideration to create an interesting experience for the guests.

2.4.1 Initiation phase

During the initiation phase, the aim is to identify potential ideas and analyze which ones best support or advocate the event's objectives. It is the responsibility of organizers to identify all stakeholders and understand their specific interests. The most commonly used event stakeholder categories are the attendees, media, sponsors, community and event organization. A step in the process often overlooked is the reviewing of the successes and failures of past events to identify lessons learned which is vital in planning for successful future events.

Generated ideas that will meet the goals of the event are easier to process with different project management tools. An example of a useful structuring device for developing event concepts would be Goldblatt (2005) 5W's framework, which helps the event organizer to invent ideas using criteria of desirability, viability and feasibility.

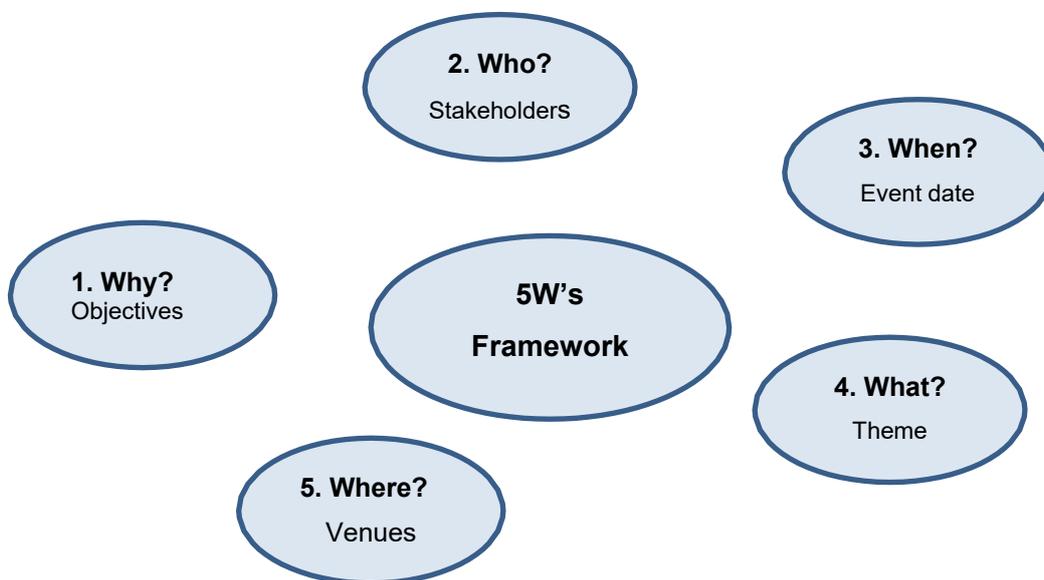


Figure 4. 5W's Framework (Goldblatt 2005.)

The structuring tool is reminding what should be considered in the first instance when starting to plan an event. It is crucial to define what the real purpose of the event is, answering the question 'why'. Additionally, all stakeholders who are affected by the outcomes may be

defined even though this might often be taken as obvious. The event date and the location should be decided or at least options from which to choose created. Of course the topic and content of the event should be planned too, although at this stage it is usually just a draft to be confirmed later on. In the other words, details of the event should be considered. All five questions will be explained in more detail in the following chapters: objectives, target group & stakeholders, timing, agenda and event venues.

Why/Objectives

Goals are typically broad statements that indicate an assumed outcome and set the guidelines for tactical action planning. An event may have short-term and/or long-term goals. Long-term goals are often harder to achieve. The business units of an organization should communicate their individual goals, so that they are in harmony. Goals defined by an event team may be aligned with the goals of marketing, administrative and finance teams. All of the goals of the event need to be adjusted with the mission and the vision of an organization. (Fenich 2015, 33.)

The objectives should determine the details of each event in terms of design as well as all the other decisions made ranging from the choice of facilities, speakers, food and beverage to the overall budget. Organizing a meeting or an event without measuring specific objectives or outcomes is often considered a waste of valuable resources.

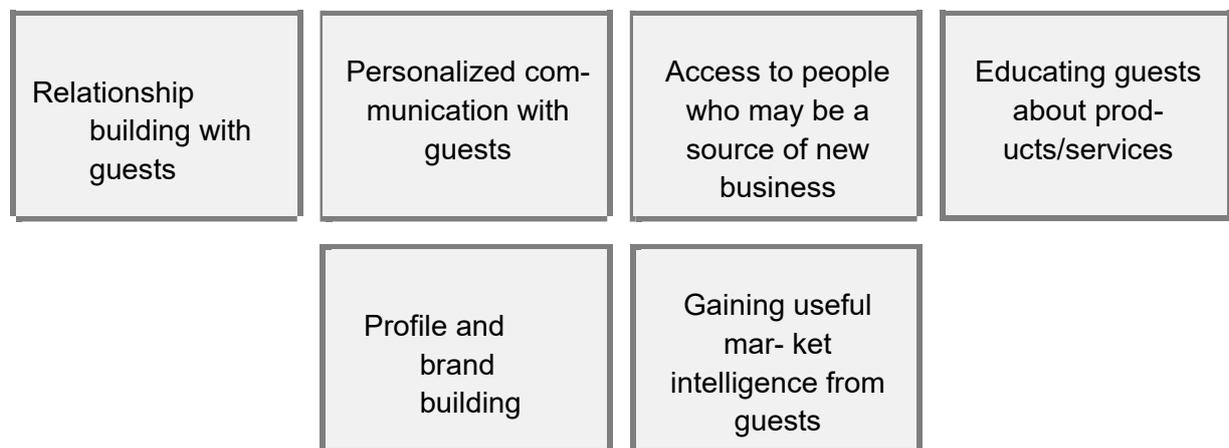


Figure 5. Objectives of B2B Events (Davidson 2019, 279.)

The objectives of corporate meetings can be classified in two categories: general objectives that are overarching goals justifying the investment for such events, or stated objectives that would indicate the desired outcome. The vast majority of events share one or more of general goals that can be such as learning/communication, networking, decision making, and

motivating/inspiring the participants to create a positive attitude towards the organization. General objectives often overlap with each other but the relative importance varies according to the type of corporate event. For example, sharing information between participants at a sales meeting has an impact on their learning while lunch breaks give an opportunity for networking.

Besides the general objectives that describe the purposes of the event, the need for more specific and detailed goals exist. These detailed goals for meetings may be communicated in written form to people involved in the event organizing as a part of the agenda in advance, and have been found to be helpful in increasing the effectiveness of events. As Courtney Muehlmeier (2014) states, addition of the purpose to a meeting's objective ensures that the discussion is moving along a path that uses the participants' time more efficiently, by focusing on the desired outcome of the meeting. (Davidson 2019, 34-35.)

Who/Stakeholders

It is critical to understand the motivation of target audiences to attend an event which is a key factor for success. In other words, it is essential that marketers and event managers truly understand their audience. By understanding the demographic information such as annual income, age and ethnic background, event managers have a better chance to develop a successful event. Understanding the target audience assists event managers to improve their overall plan. (Beech & al. 2014, 139.)

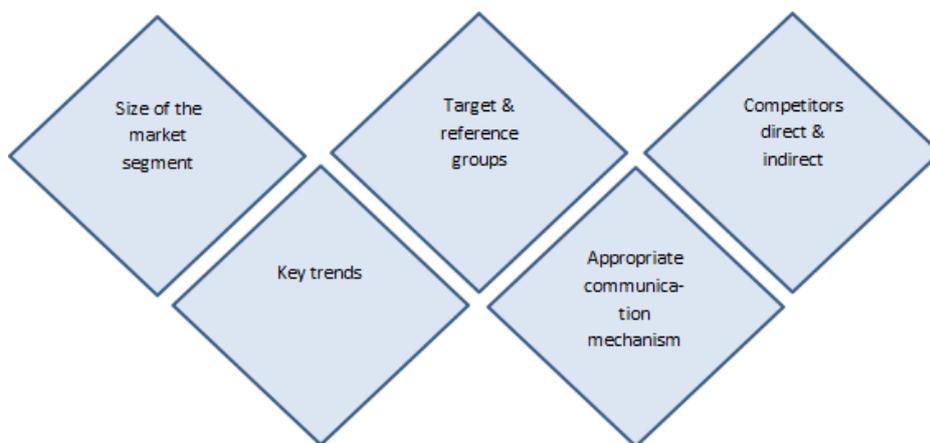


Figure 6. Key Considerations of the Target Group (Ferdinand & Kitchin 2012, 121.)

In the figure above, key considerations concerning the target group for the event are presented. It is essential to understand what the size of the market segment is that the organizer aims to invite to their event and how they are going to set limitations, who to invite. By understanding current trends and what the vast majority of the target group are interested by

the time, the organizer is able to create and adjust the event program better related to audience. Appropriate communication mechanism ensures efficient marketing and invitation process. When the event organizer is aware of direct and indirect competitors, they are better able to define their own target group according the current market situation.

The success of an event is ensured when the right audience attends. Normally organizations use noticeable amounts of money per event guest and as such it is essential that participants are at an appropriate level with the decision-making capability. (Davidson 2019, 281.)

When/Event Date

Corporate events typically have peak and off-peak seasons. Traditionally only a minority of corporate events take place in July, August or December justified by the fact that the organizations' employees are often on long summer or Christmas holidays. In addition to the right choice of calendar month, the day of week is an important decision for the event manager.

The importance of choosing the right day can be seen in the number of attendees and the success of an event. Corporate events that are held for business purposes with B2B as their target market are often organized during the working week. Mondays and Fridays are usually avoided with some exceptions, as business clients are often unwilling to participate in an event when it has elements of socializing in the beginning or at the end of the week or they are away from the office, having long weekends. Therefore, the vast majority of corporate events are held on Tuesday, Wednesday or Thursday. Also these events are usually run during business hours due to the tendency of attendees to view B2B events as work, therefore being unwilling to give up their free time to attend the event.

It is responsibility of an event manager to keep track of school holidays, national holidays, bank holidays, religious festivals and related holidays that should be avoided, except if the event has a related and specific theme. Event managers must identify the best date with the minimum number of obstacles that might affect participation thus maximizing the potential number of attendees in the desired target group. (Bladen & al. 2012, 317.)

What/Agenda

Corporate events provide organizations an opportunity to maintain and develop relationships with clients, make sales and close deals, meet with clients of competitors, and work towards the long-term corporate objective. Therefore corporate event managers must understand the

desires of clients in order to make sure that the event meets the customers' expectations and perceptions from the corporate and event perspectives. (Bladen & al. 2012. 319.) The particular event or activity chosen should be aligned with the focus of the corporate hospitality event, and is a key factor in defining the level of success in terms of receiving the best acceptance rates from the requested target market. (Davidson 2019, 280.)

The process of reviewing the purpose, success factors and concept testing provides an effective scoping of the idea and brings up key factors that might affect the event, from the wider external environment. Created ideas can then be processed with greater confidence to consolidation and articulation of the theme bringing a solid and clear proposition to the design phase.

A solid and tested theme should be brought to the design stage that can be subsequently articulated and developed to outline the originality of an event, critical success factors, its objectives and audience appeal as well as potential in relation to competitor events. This forms the first stage of the creation and design process.

Regardless of the nature of the corporate event, the elements must be designed to match with the theme before establishing it. The next stage of the design process looks then at the exact form and format of the corporate event that will enable the event to stand out from alternative options, to reach requested audiences as well as the objectives and purpose to be delivered.

The design stage requires proper attention, and has been found to have significant rewards. Time effectively spent on resourcing this early phase of development provides a more secure platform for the event on which to create and deliver. Comprehension and grasping the core design standards of an event provides clear guidance that is effectively advertised and effectively comprehended by every one of those included, regardless of whether inward or outer to the organization'. (Beech & al. 2014, 317.)

Where/Event venues

The choice facing the corporate event planner is whether to hold the event at the company's own premises or at an external venue. Occasionally the decision is made based on practical issues such as the lack of capacity at their own premises. Most often though the decision to have a meeting at external venues is linked to the explicit objectives of the event.

If the meeting planner decides to run the event off-site, the next consideration would be the type of venue to be used. (Davidson 2019, 36.) While some of them (meetings, conferences, conventions, trade shows and exhibitions) can take place in conference and exhibition centers built for purpose, many other smaller scale events such as incentive and networking events can be held in restaurants, hotels, art galleries, museums, vineyards or golf clubs. An integral part of designing an event is to find a venue that fully complements the content and objectives of the event.

General event requirements of location, capacity and size must be taken into consideration. However, besides logistical requirements, the event manager should choose facilities according to the perception of the target market and stakeholders. A key consideration in choosing corporate event venues is: what kind of image and message the venue will send to the target market as the image is a great part of the event concept as a whole. As an example, a venue such as the Marriot hotel gives an event attendee an image of wealth, formality and high class service with first class food, whereas the Moulin Rouge, located in Paris, gives more risqué image of entertainment, fun and informality. These images do not only reflect on the corporate event itself, but also contain deeper messages about the event organizers, their work philosophies and products. (Bladen & al. 2012, 318.)

Traditionally hotels with facilities for meetings have been used as external venues for corporate events and still continue to dominate the market today. Businesses use hotels which offer advantages and are often located close to their premises. It is not unusual for a corporate event organizer to return to the same hotel again for their events and this strong tendency to repeatedly execute events at the same venue by B2B clients has been recognized.

However, in recent years hotels operating within the corporate events market have faced increasingly growing competition from other categories of venue such as facilities known as unique, unusual or non-traditional venues. Varying types of venues including museums, theatres, castles, zoos, theme parks and sports stadiums have opened their doors for events as a commercial activity. The main motivations to offer their facilities, apart from using them as tourist attractions, is the increasing pressure to find additional revenue streams and more effective ways to manage the fluctuation in demand due to the seasonal nature of tourism. The corporate events market has adopted uncommon venues with great enthusiasm. Such events are more likely to be memorable for the event attendees than the ones held in a chain hotel's seminar room.

Rogers and Davidson (2016) presents another advantage of surprising venues: from the events planner's perspective using uncommon facilities may present a tremendous advantage for the potential of increased attendance levels among the delegates who might otherwise decline the invitation. This attraction factor might pose as a particularly important point in events such as product launches, product presentations and press conferences, which do not have any obligation to attend. (Davidson 2019, 36-38.)

2.4.2 Planning phase

The planning phase starts with elaborating on the selected idea and by designing the agenda for the event. At this stage the drafted theme should be tested with the target audience before confirming the final topic and agenda. Activities that are required in order to deliver the event should be defined followed by resource requirements. The estimation of the duration and required effort plans must be done based on available expert judgement as well as historical information. The event should be divided into smaller tasks and needed effort for each section estimated. After understanding all the moving pieces concerning the event, a schedule should be drafted for which the Gantt chart is a particularly practical tool. All event preparation tasks should be scheduled as well as the event day itself. In order to prevent any larger issues occurring, responsibilities and the decision-making process should be defined at an early stage. (Beech & al. 2014, 144).

To summarize, the following details should be taken into consideration:

- Work schedules and deadlines
- Budgets
- Risk Assessment
- Personnel plans and resource utilization plans
- Procurement plans
- Documentation plans

In the event planning process, there are many integral considerations such as risk management, marketing, budgeting. However, the risk management and invitation process are seen the most critical considering the final guide book for EF, as for instance the budget arrangements remain more often stable. Risk management is seen important for structured event project, as then teams are prepared for unplanned situations, and inviting process critical for attracting more attendees. Consequently, the next chapters discuss about risk management and invitation process.

Risk management

For an event organizer it is an essential part to recognize hazards that might potentially cause problems at the event. The aim of risk management is to identify hazards and control risks. The risk management plan should be used to update the budget, schedule, WBS and flowchart among other things. The four main steps of the risk management process are:



Figure 7. Risk Assessment Instructions (The University of Western Australia 2013.)

As presented above, the risk management process starts with risk assessment. This phase is built on identifying potential hazards. Four categories that should be considered when identifying event hazards are human, natural, environmental and technological. The human category includes for instance guest numbers, type of guests, and experience in event management as well as availability of health and security personnel. Natural hazards can include such as event location, transport and parking availability and condition of the event facilities. Environmental threats may be considered: waste management as well as impact of the weather. In most of the events, technological issues are a huge concern and event organizers should take it in consideration in risk assessment. Safety equipment and availability of utilities may be ensured and risks reduced.

Based on the identified hazards event managers should in the risk control and risk rating phase create strategies to prevent, eliminate or find alternative ways to handle risks occurring. Event managers should be encouraged to discuss with the other people involved in organizing the event to assist in developing risk control strategies. The five methods commonly used to reduce or eliminate risk are as follows:

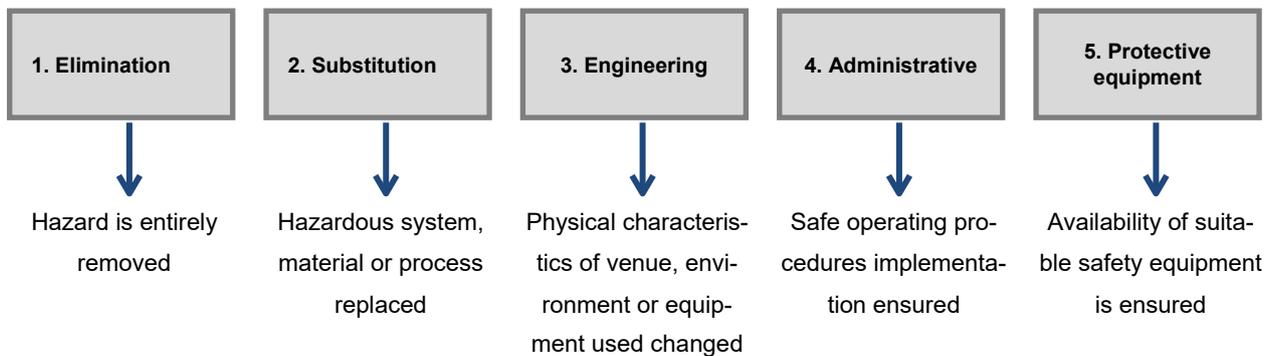


Figure 8. Risk Control Methods (The University of Western Australia 2013.)

Once the risks and control strategies have been identified, each hazard can be determined by a risk rating. This is based on two different factors: likelihood and consequence. Likelihood is determining the possibility of risk appearing after risk control strategies have been created while consequence determines what would happen and the severity of it if an issue occurred, taking into consideration control strategy determined. (The University of Western Australia 2013.)

Guest List & Invitation Process

In order to execute a successful event it is essential to plan well who the event organizer wants to invite. When starting to plan the guest list, it is time to go back to the defined target group. For each event the guest list requires to be drafted separately and invited well in advance. Key considerations should be who are the guests that the organizer really wants to invite, who would be delighted at the invitation as well as who would benefit from the event. It is good to start planning the guest list with the entire event team including all colleagues, sales and management. They all have the best and most accurate information of who the organization wants to invite and meet. A good guest list consists of people who consider the event as beneficial and congenial and who want to attend.

It is recommended that a good guest list comprises of people from different categories with a good balance. Firstly it is good to have participants who like and know the host company

well and are experts. The other guest group may then be people who find it meaningful that they are invited to the event and are interested in the other guests and networking. Thirdly it is important to have people attending who strengthen the so-called “we” spirit. These guests can be the likes of owners, company management and representatives who the other guests are familiar with. Lastly it is always beneficial to have nice and generally happy people who raise the general atmosphere of the event.

Generally speaking, it is good to create a guest list that has 20 percent more people invited than the expected number of the guests is. 20 percent is frequently the number of people who will not be able to attend. However, the better the guest list is constructed the less extra people need to be invited. For instance if the planned number of attendees is one hundred and the event organizer sends the invitation to one thousand people, the guest list should be reconsidered. Such an enormous guest list is usually a sign of laziness and indicates that the organizer is simply trying their luck to see whether someone will accept the invitation. A well planned guest list signifies that the attendees understand why they are invited and will experience the event content as meaningful to them. When this is the case, guests usually only cancel their attendance for natural reasons such as trips, other events, family situation and last minute schedule changes resulting in fewer cancellations overall compared to the opposite case.

The main goals in event communications are attracting people, sharing information and active dialogue with the guests. All these three divisions should be well covered. Attraction factors may arouse interest among invitees and inspire them. The communication should be designed in such a manner that the invitees are willing to sacrifice their time to attend the event. The event marketing is linked to the attractiveness and highlights the sensory benefits and communal features of an event. According to the Event Marketing report (2019), 80% of over-performing businesses planned to increase their event budgets the following year.

When planning an attractive communication it is good to remember that the aim is to exceed the expectations of the attendees. The message must be interesting but it must not promise anything that cannot be carried out. The visual nature and the text contents create the atmosphere of the event while the tone presents the style of the event and how formal or informal they want it to be.

It is necessary to meet the information requirements of the participants. In its simplest form, invitees can be provided with an email address for further queries or more information within

the invitation. Many other alternatives exist such as a contact person mentioned in the invitation, own web page or Facebook page for the event as well as a separate information letter. The most important thing is that the information is available in a well-structured and understandable manner. The lack of clarity is often due to the presumption that the guests are expected to know more than they in fact do. In addition, internal information communication inside the organization is an integrant part of the communication aspect. Efficient communication ensures smooth running and all parties being aware of key considerations and being able to share more information. When the communication of the event is coherent, the willingness of an invitee to attend increases.

The dialogue regarding the event starts when guests receive the invitation and hopefully continues after the event. It is good if guests are willing to discuss the event at the event, before and after. As such it is advisable to name a contact person who knows as much as possible about the practicalities and the content. It is very hard to define what the right amount of communication is as it depends on the event. No one likes spamming while it is also annoying to guests if enough information is not provided. Organizations know their guests the best and in this sense they are the most capable of defining how much communication is needed. (Catani 2017, 27-31.)

The invitation may be in digital or printed format, personally delivered or on the phone but regardless of how it is delivered it forms the table of content and creates the atmosphere. The outlook and the content of the invitation awaken the interest of the receiver. In today's world people continuously receive invitations for different events and most of them end up straight in the recycle bin. As already mentioned, comprehensive information must be provided in order to ensure that people become interested and find their way to the event. The invitation must tell the receiver whether it is personal them or they can give it to a colleague in case they are not able to attend themselves or, whether they are allowed to bring an avec along. (Catani 2017, 61-62). In the invitation the following information must be provided: why the event is organized, who is invited, the event location, the time and whether registration is required. In addition, other information and details can be added such as hyping of key note speakers and a contact person for more information.

2.4.3 Mobilizing/implementing phase

This phase represents how set-up activities are performed. The event management team ensures that the event is delivered in a way that the stakeholders' expectations are met within cost requirements. Their main responsibility is to observe and control activities to avoid

unwanted outcomes. It is imperative to take a corrective action when issues occur. (Catani 2017, 91.)

In order to optimize the value gained from a corporate event, the event organizer company should create at least one desired outcome for each guest of what the host organization wishes to achieve from discussions with each of them taking place on the event day. It may be too ambitious to expect to sign a contract or make a formal agreement at a corporate hospitality experience event, the primary function of which is to be a social gathering. However, viable outcomes could include an agreement of subsequent action such as a follow-up meeting or phone call to discuss business as well as an introduction to a beneficial contact of the guest. (Davidson 2019, 281.)

Prior to the event, an event briefing with the whole team is required. All people included in organizing the event should gather together with the aim of delegating all tasks and ensuring each team member is fully aware of their responsibilities. Usually the briefing is held a few days before the event at the event venue. In these briefings the event manager should be absolutely certain that all responsibilities are delegated to the point of who comes to the stage if the speaker is unable to run the PowerPoint presentation, who ensures the technology is working and who is the contact person in case of any issues on the day. During the briefing the event team are able to familiarize themselves with the event venue from where they can find certain things to how people move within the facilities. On the event day there might be unusual security or traffic arrangements that might complicate the arrival or entry into the building. All these should be discussed beforehand with all the event attendees in order avoid stress and confusion on the day of the event. It is easier to solve problems and clarify event-related matters prior to the event rather than during it. Almost without exception during such briefings someone comes up with an improvement or change suggestion. (Catani 2017, 91.)

2.4.4 Staging/execution phase

For the reception and registration of guests it is advisable to reserve a person or people who know as much as possible about the event guests as well as the facilities and the event programme. People highly value the fact that they are recognized or known. The recognition of the guest makes the registration process easier and faster. It is an integrant part of the event to make guests feel comfortable and welcomed from the first point of contact. (Catani 2017, 100.)

The events manager should make all the guests feel welcome as well as special and take care of the event participants equally. They should decrease the uncertainty of shyer participants by inviting them to join, introduce guests to each other and lead them to food, drinks and the programme. (Catani 2017, 104.)

Throughout the day the event manager evaluates performance against plans and ensures performance success. Right after the event when everything is still fresh in memory, an event report including an evaluation on each separate part should be produced.

2.4.5 Closing phase

The closing phase includes collecting and reviewing the feedback, summarizing the event, and sending thank you email to participants. In the best case, the communication of the event will continue afterwards between all stakeholders. The key is to learn from mistakes that have been done when organizing an event and what could be improved. The evaluation of the whole process is already done and documentation produced. The event team reviews the documents and can learn lessons to guide future events. All financial issues should be resolved and assets created. (Ferdinand & Kitchin 2012, 88.) The feedback level and the real return on investment were raised to be questionable in the research, and therefore the feedback and measurement & evaluation are discussed next.

Feedback

As stated, the closing phase remains critical to the evaluation of the feedback from guests and all organizers. Feedback can be collected in different ways. Postal questionnaire survey is a commonly used method, and because of their tendency to generate low response rates, multiple surveys have gone into ways of improving response rates. The following steps are generally suggested:

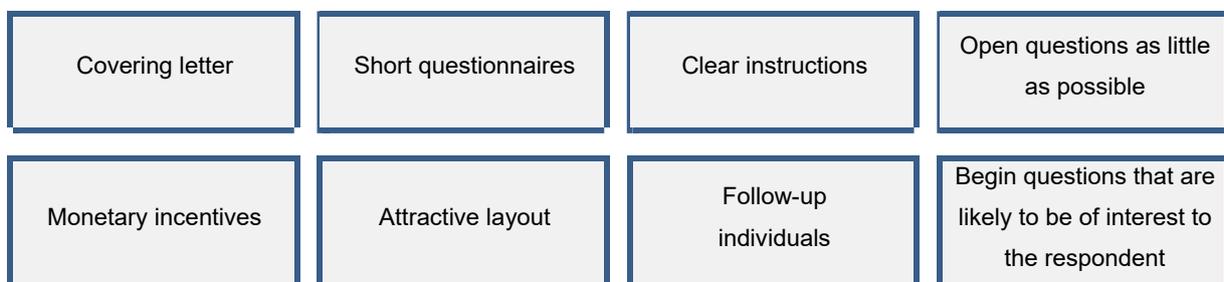


Figure 9. Postal Survey Requirements (Bryman & Bell 2015, 243.)

A good covering letter that explains the reasons for the survey is required as presented above. It should include at least: the importance of the survey, the reason for the selection of the recipients, and reassurance for the confidentiality of the matters. (Bryman & Bell 2015, 243.)

Measurement & Evaluation

The data for analysis should be easily accessible as well as tracked and tallied throughout the event life cycle. The information of the average meeting cost for each guest, cost trends from year to year, negotiated savings, annual spending with a specific hotel and whether it meets the original budget, are among the analytical questions to be evaluated. The reporting tools are recommended to be user-friendly, flexible and customizable in terms of viewing in multiple different ways such as dashboards, charts, budget analytic comparisons and many others. It is vital to use good business intelligence analytics for a successful strategic meeting management. The need to measure the effectiveness of each meeting (return on investment), should be defining the average event spend. The question is not simply of how much money was spent, but also about benefits gained out of the event. In order to perceive the actual gain, a systematic tracking to convey the measurable and specific objectives and goals from the event planner to all stakeholders, is required. The progress towards set goals such as learning, increase in sales and new clients should be discussed and measured before, during and after each event. (Davidson 2019, 47.)

3 Company description

EF Education First was founded in 1965 by Bertil Hult. EF operates 612 schools and offices in over 50 countries and employs 52 000 people. The company provides language training for people around the world with different methods. At the beginning of their story the mission was to combine language learning and travelling abroad.

More specifically the study concentrates on EF Corporate Solutions, which works in B2B field. It runs advanced cloud-based language learning environment as well as providing local face-to-face courses, teacher-led online courses, self-study courses, study abroad courses and language testing.

As a marketing activity to support sales, EF Corporate Solutions usually organizes annually one large-scale seminar type of event in countries where they operate, for its existing clients and prospects. The seminars are free-of-charge and aim to engage clients with EF, attract prospects, and create market awareness. The company has centralized event management support, but the organization of local events mainly relies on country managers. (EF Corporate Solutions 2019.)

4 Research

The intercultural approach, which this thesis focuses on in the study, takes into consideration the interaction between people and two organizations from a project management perspective. Despite the fact that the thesis involves research the aim is to create a useful tool (final product) that helps in organizing corporate events. The goal of the research is to find the main struggles for the EF teams in organizing events and, subsequently, try to find solutions for the issues detected providing them with a how-to guide book.

The sub-research questions: how to attract more people to attend; decrease the cancellation rate, and how to develop the effectiveness in relation to sales, were the starting points for the study. Subsequently, the main objective (a manual) aimed to be lead from taking the sub- research questions into close consideration.

Consequently the semi-structured interview and non-participant observation are to be the main research methods of the thesis. The qualitative approach, that usually refers to the research method that emphasizes words rather than quantification in the collection and analysis of data, (Bryman & Bell 2011, 394) is considered most suitable in order to help the country managers in organizing events.

The classification of the research method of this thesis is qualitative while quantitative data was utilized to make conclusions and plan the questions of interviews. Before starting the empirical part of the study, previous years' feedback was collected from different countries and reviewed in order to understand clients' perspective and improvement areas at the general level.

4.1 Research methods

The term 'Semi-structured interview' covers a large range of instances. It refers most often to a context that includes a series of questions in general form but the sequence of questions can vary. Generally speaking, the questions are more generic in the frame of reference than in a structured interview. In addition, the interviewer usually has latitude to make further questions in response to remarkable replies that are seen valuable for the research.

The main consideration for many interviewers is whether to ask open or closed questions. The issue of which kind of questions should be used is relevant to the design of self-administered questionnaire research and structured interview. With an open question, inter-

viewees are asked a question and are allowed to reply however they wish. When asking questions in a closed format, respondents are provided with a set of fixed response alternatives from which they are requested to choose the best answer they feel represents their opinion. Decoding the answers to an open question generally requires reading the transcripts of interviewees' replies multiple times and formulating distinct topics based on their replies.

The questions should be clear so that they are understandable to others as well as to the researcher. Questions should be devised to be researchable and they ought to be appropriate for advancement into a research design, so that the information might be collected in connection to them. This implies that highly theoretical terms are not likely to be appropriate. The connection with established research and theory must exist in relation to the questions and the questions should be connected to each other in order to formulate a whole survey. In order to gain benefit from the research, questions should have the potential to make a contribution to the knowledge gained. Questions should neither be too narrow nor too broad. (Bell & Bryman 2015, 257-258.)

The non-participant observation normally describes a case in which the observer is quietly following the process but is not participating in the happenings in the social setting. Structured observers are more often non-participants in a sense that they are involved only in the observation of the social setting but rarely taking part in what is happening. Unlike structured, unstructured observation does not involve the use of a schedule when recording the behavior. A researcher aims to record the behavior of participants in as much detail as possible with the objective of developing a narrative report of occurring behavior. (Bell & Bryman 2015, 281).

In order to build a continuous entirety for the manual, all example templates provided will be from the Helsinki 2019 seminar which proved to be remarkably successful from all aspects.

4.2 Research implementation

The case study means an extensive examination of an event in Frankfurt in 2018 and will be implemented by using an observation technique along with open-question interviews/discussion with the Program Manager of Team Germany. This phenomenological methodology aims to focus on understanding the dynamics within a single setting that the research problem refers to. A case study approach infers a solitary unit of examination, for example, an organization or a gathering of laborers, an occasion and a procedure. It includes gathering definite data about the unit of examination, over an extensive period of

time, with the end goal of getting top to bottom learning. (Collis & Hussey 2003, 68.) This research implies a descriptive case study that has the objective of describing the current practice in the organization in one specific country. As a silent observer, I attended virtual meetings related to the event and made a note of mainly internal emails, but also of communication material to invitees. A note of all details included in event project is done, and aiming to provide with a comprehensive description of the entire process.

The non-participant observation method as a case study provided with information of the current structure of the event project. The first initiation meeting was held 4 June 2018, and was a kick-start for the event organization process. The event was organized 22 November, 2018, but the last closing meeting was held 8 January 2019. Therefore, the observation lasted approximately 6 months. The implementation of the research method was well managed as people involved were aware of the research project and actively ensuring that all needed information is shared with me. The Web Publishing & Events Manager confirmed all the main meetings and the Program Manager was forwarding all the emails I did not receive.

As I was not participating in daily discussions in the team and was lacking of some details, the semi-structured interview was decided to be taken aside of non-participant observation method to fulfill missing parts and get deeper understanding of the whole process from someone who is actively organizing the event. Consequently the Program Manager of Germany was decided to be interviewee 4. One interview was conducted before the event and one after the event.

Investigation interviews have a specific meaning and role unlike a normal daily discussion. The interviewer is a party unaware and the interviewee has the knowledge. The interview is conducted on the researcher's initiative and the interviewer is leading the conversation to specific topics. Interviews can be spontaneous discussions although it always has a goal; the interviewer aims to find answers to the survey question(s), in this case the struggles in organizing events. The interviewer asks questions and makes initiatives, encourages the interviewee to answer, leads the conversation and focuses the conversation on specific themes. The most visible factor of an interview compared to a normal discussion is the roles of the participants; the interviewer asks questions and collects information while the interviewee answers the questions and provides information. The institutionalism of the situation is describing, recording and that the interviewer is making notes. (Ruusuvoori & Tiittula 2015, 22-56.)

Interviews of this thesis are implemented in a semi-structured way in order to be able to ask further questions that are seen relevant to the survey. The term best suited to describe the interviews conducted for this research is 'Focused interview'. Interviews are implemented virtually in November 2018 and recorded in order to listen to them several times to sum up interviews in the most correct way. The research expectations were to find similarities in their answers in order to make clear conclusions and cover certain topics that had earlier been identified as concerns. However, the interviews aimed at leaving some freedom for respondents to allow them to bring up points that were not questioned in the research. The important part was to get a sense of the bigger picture of the events as the final product is a general manual for organizing an event. In this research the objective was to let interviewees freely tell about their struggles as well as best practices to find out the biggest issues that have not been detected yet.

Many features of an unstructured interview is included such as open-ended conversation and informality to make interviews more relaxed and flow like everyday discussion. Certain topics are discussed during the interview with each Country Manager and therefore predetermined questions are set which makes the interviews vary slightly from the type of an unstructured interview. The goal is to make further questions according to the interviewees' replies in the form of an open discussion. In any case, the interviews still have directing and purposeful nature and the interviewer aims to gain valuable information and insight from the interviewees. As an unstructured interview still requires proper preparation and detailed knowledge of the theme even though it might resemble an open discussion, (Study.com 2019) the insight to the events at EF Corporate Solutions was gained beforehand with participant-observation at the Helsinki Event in 2018, discussions with key event organizers in the company and quantification of collected data such as customer feedback.

The strategy used in analyzing qualitative data is grounded theory and the tool used is constant comparison. We can regard constant comparison as a process which maintains a close connection in relation to concepts and categories in order to ensure that the correspondence between these factors with their indicators is maintained. By focusing on the process of constant comparison, it prompts the researcher to compare phenomena which are being coded under different categories in a manner that encourages a theoretical elaboration to emerge. This involves the review of transcripts and/or field notes and issuing names (labels) to specific component parts that would appear to have prospective theoretical importance and/or that appear to be noticeably striking within the context of the social worlds being studied. The study was using open coding that examine, compare, conceptualize and categorize the

data. This coding process results in concepts, which can be grouped and converted to categories at a later stage. (Bell & Bryman 2011, 585-586.)

4.2.1 Target group of interviews and questions

Interviews were conducted with country managers in the Northern European region, including Finland, Sweden, Netherlands and Germany. The aim of these interviews was to collect specific information concerning events organized by EF Corporate Solutions and some best practices of the country managers based on their own experience as they are largely responsible for organizing the annual events in their own countries. All requested interviewees agreed to arrange time for virtual meeting that ensured smooth implementation of the method.

Events are organized in collaboration with company X which provides leadership and management training for executives. Their part in organizing events can change with each event.

Interviewee 1: Country Manager (Finland)

Interviewee 2: Country Manager (Sweden)

Interviewee 3: Country Manager (Netherlands)

Interviewee 4: Program Manager (Germany)

The interview questions as follows:

- Who are the participants in planning events?
- What support do you need for organising an event and do you get it?
- How do you manage collaboration with company X?
- What are your key objectives in holding events?
Do you feel these objectives have been met with recent events?
- Do you think sponsored events generate more sales than events held by EF?
If you have a budget for 1 event a year, would you rather spend it on your own EF event or would you spend it on a sponsored event?
- Do you have any good examples or success stories of deals that events contributed to?
- Is there an event or some specific part of it that went completely wrong? Why?
- Who are planning the guest lists for events?

- How do you invite your clients to the event?
- Why do you think your clients want to attend EF events? (What are the motivational reasons)
- How do you usually collect feedback from clients? Does it work/why doesn't it work?
- Do you have any good practices that you would like to share with other countries?
Or maybe suggestions on what you would like to test at further events?

The questions were planned according to customer feedback and the interests of the event planners in the organization who were participating in guiding the thesis. Some questions were for understanding the entire process concerning events and differences between countries in event organization. Interview questions were revised on behalf of Marketing Vice President and Web Publishing & Events manager before conducting the interviews with Country Managers. As the biggest issues detected before this research seemed to be concentrated on what the real value of the events is, the number of participants and how to attract existing and prospective clients to attend the events, many of the questions were centered around ROI (Key objectives & sponsored vs. own events). As some Country Managers have seemed to be concerned about the benefit of the events, it was important to find out at the beginning what their real objectives are and whether these have been well measured previously as well as whether they have been met.

In order to improve on the number of participants as well as ROI, an integral part of the interview research was to find how they are deciding on whom they should invite and how the clients are invited. Consequently, when the number of participants increases and there are more prospects coming along, the visible benefit for the events is better measured or seen. Additionally, understanding clients' motivations to attend the event is the key for attracting them more.

Generally speaking, it was also noticeable that the feedback response rate was fairly low, so the interviews were aiming to find alternative ways and understand what works the best. All countries decide for themselves how to collect feedback so it was crucial to find out whether some countries have found better ways of collecting feedback and whether the existing ways work well or should we consider completely new ways of collecting it during or after the events.

As a researcher I also wanted to leave space for interviewees to tell about their general struggles as well as best practices, and find out this way of any other issues that have perhaps not been detected yet. The questions in the interviews do not cover every aspect of the theory in order to keep the interviews succinct but delve deeper into the parts that are found to be the most critical. (Bryman & Bell 2015, 93-96).

Additionally, the aim of the interviews was to benefit from the knowledge and professionalism of the interviewees thus making open questions more suitable for the interview to let them tell in their own words what they had found to work well. However, the research does include some closed questions with options such as sponsored vs. own event, but for all the closed questions the justifications for the answer were required and the interviewees were able to explain in a way that suits them best.

4.3 Results

4.3.1 Interviews

The country managers' experienced responsibilities were mainly overseeing the entirety, delegating different tasks to their team, deciding on a suitable date and place as well as coming up with a theme for the event. In their words the whole country team would be involved with tasks delegated depending on for example who had the time. While the country manager is responsible of overseeing the entirety, everyone in the team participates with different roles in planning the event. The events manager in the central office in London oversees practical issues and tasks. For instance, interviewee 2 would suggest a few locations and the events manager would then request price quotes booking the most suitable one. If something were needed to be sent out from the central office, the events manager would also be responsible for that.

Most commonly marketing support is required and in their experience, they feel that the support from the central marketing team is sufficient. The marketing support usually includes a save-the-date template, invitations, central marketing and marketing emails to the database. Another important factor that was raised in the interviews was the need for proper communication with company X.

Countries where EF events are considered successful, the event tends to be the highlight of the year. Events were mainly considered useful and successful when these had clearly contributed to obtaining new or larger contracts. More specifically, the benefits of organizing the event could be measured when the event played a part in the decision-making process for

signing new contracts, the Key Account Managers had successfully established a dialogue following the event or the event clearly had an impact on moving forward with negotiations. Additionally, the benefit could be seen in instances where the EF team was able to build stronger relations with customers during the event. One interviewee described how sometimes customers had already made the decision to start language training with EF and events were seen as a good opportunity to get to know EF better.

Not all country managers necessarily always see a benefit in organizing events. When it comes to events in general the benefits overall can be hard to measure. In countries where EF is able to attract prospects to an event, the benefit is seen more clearly, but the exact value is almost impossible to measure. For instance, in the Netherlands the experience has been that organizing an event may not be worthwhile when considering the amount of effort that the team has to put in. All their event attendees have been existing clients and the team felt that they already have close enough relations with their clients rendering it difficult to be able to give extra value to the participants. Interviewee 3 felt that while the actual gain is irrelevant, considering the difficulty in getting people to attend and the limitations in the marketing budget organizing events is not maybe worth the time and effort required.

The country managers were asked to list goals and key objectives for organizing an event, which is essential to define in the initiation phase. The commercial goal was one that came up every time. During the interviews many mentioned that often clients who come to EF events are surprised in a very positive way by how large and successful an organization it is as well as by the possibilities of all the things that EF can do. Also mentioned were branding, showing people how active the company is, their annual updates and the launch of new reports to share. Positioning EF in the market as a frontrunner to existing and potential clients was seen as an important part of the events. Additionally, giving extra value to customers and providing them with the possibility to network with other business professionals in the same field with the aim of convincing clients by letting them meet and discuss with others was mentioned. As stated before the real value was seen in EF being able to attract prospects in order increase sales, which seemed to be the main goal while being the very thing they struggle with the most. Where countries had managed to attract potential target clients to the event, the experience was that getting them to talk to existing clients was very helpful in further negotiations.

A successful event consists of many different factors. The event day includes key note speaker(s), customer cases, food, networking and sometimes workshops. Many country

managers highlighted, though, that planning an event is not a very structured process at the moment and in all of the countries they are organizing events by “feeling”. In Sweden it was also felt that they have not really reserved enough time for planning the events and inviting people. When people were invited to an event two months before many have already their calendar booked and are unable to attend. This time they have started planning much earlier and are hoping for an improvement in the results. All KAMs are involved in deciding who is going to be invited as they know who will have value for local events best. Everyone is already very busy with just filling the room.

In all countries the main struggle seems to be how to attract enough people to attend. The low number of attendees and late cancellations are troublesome for the EF teams when organizing an event. In many separate ways the issue of the target group was raised. In order to get the required number of attendees it is crucial to consider the general features of the target group. As experienced in the case of the event in Frankfurt which was cancelled due to the low level of attendance confirmations, the selected high strategic topic, which was unsuitable for HR people, was not considered attractive among the targeted invitees. The invitees should be aware of why they are invited to the event and what the benefits for them are. Interviewee 3 was also wondering whether German people are not really events oriented because they have to concentrate on their work or their target participants are not in positions high enough to just decide themselves to attend an event and leave other work for the day.

In Sweden it can clearly be seen that while the amount of attendees has decreased crucially from 2016 to 2018 so have cancellations. Subjective experience of reasoning was that in 2016 team Sweden was inviting everyone without measuring any specific target group. 17 out of 47 participants either cancelled or failed to show up. Based on the experience of this specific event it is possible to state that the likelihood of cancellations is higher when people are outside the target group and fail to understand why they have been invited to the event. Even though the number of attendees has decreased, and in 2018 there were only 20 participants, the event was considered better and much more beneficial as the people in attendance were the desired target group. Additionally, the cancellation rate at this event was minimal. Germany also had a similar experience where one year there were less attendees but more importantly the people there were beneficial for them. When the people were exactly the ones they wanted there, discussions as well as the atmosphere were much better. Much more crucial than the total number of attendees would be to measure how many of them are actually relevant for EF.

When considering the attendance levels and cancellations, it is important to think what the clients' motivations for attending are and how they benefit from it. Based on their experience the country managers' view is that these reasons include that they simply like the company and the team, they liked the previous event, the key note speaker is interesting, the possibility to network with other business professionals in their field and the most highlighted customer cases. Most country managers have recognized that many of the event participants want to hear from other EF clients as to what they have done and what has been successful in their language training. This point is often underestimated and many of the country managers want to concentrate on finding good client speakers for further events. One country manager said: "No one can sell our services better than our client." A good client speaker is a success factor and other clients enjoy hearing from them.

As an example of an ideal guest speaker Finland's choice of a charismatic individual from a well-known company was very well received. Their story about their company's language training with EF was relevant to HR professionals and covered the entire process, where they started from and how it was put to practice. According to interviewee 1 the best-practice ideas from a company that people admire and strive to follow are the key to success. Interviewee 2 suggests that finding the right person in the company who will understand the audience is important in selecting a client speaker.

Another point to consider brought up in the interviews is that when clients attend an event they expect to hear about EF and company X. In regards to the previous point, the content must relate to EF. Only then do participants understand why the speaker is talking about a specific topic and when the speech makes sense to them, it is easier to enjoy the event. The attendees are coming to the seminar to hear about communication and language training so the topic needs to be related.

A problem voiced by all these countries relates to the co-operation with company X. All of the country managers have experienced slightly varying struggles in regards to collaborated events. In the Netherlands the experience was that company X's part in the event was too dominant in relation to language training and attendees were less interested in EF after their presentations. In Sweden the problem seemed to be in attempting to merge the needs of both companies together and create a title or theme that made sense for both companies, X and EF, as well as the audience. Also in the short-term, benefits gained for EF in terms of leads from collaborated events have been hard discern while company X has been success-

ful in generating leads from the participants invited by EF. All in all the balance of content is hard to find or EF has been unable to source an interesting speaker or content.

Collaborated events with company X are seen as a good opportunity to reach out to people in much higher positions which could benefit EF, but in the first instance company X must get their foot in the door. For instance in Sweden Company X requires a larger presence and the opportunity to reach more clients. Interviewee 2 feels that in the long run it may be good but the short-term benefits are not visible. The point was also raised that company X can provide good speakers for the events.

Interviewee 2 raised the point that people from distant cities are not willing to travel far for a half-day event even if the topic was interesting. In Sweden they have resolved this by organizing another event in a different city (Malmö) thus bringing the event and the possibility to meet them closer to clients.

In Sweden the team is not reaching the desired amount of potential clients. Many potential clients operate in the North and West of Sweden making it difficult to secure attendance to an event organized in Stockholm. Therefore a local event was additionally organized earlier apart from Stockholm which proved to be quite successful.

In Finland events have been considered very successful managing to attract potential target clients almost every year except in 2018. Even though the event in 2018 was outstanding, interviewee 1 immediately recognized the problem as not having any new clients at the event making it a priority in terms of effort for the following year. EF had expected to meet some potential clients invited by company X, but as they had not received any confirmation of their registration, unfortunately none showed up.

Timing was also brought up in the interviews several times. Many are unsure what the best time in the day for holding an event would be, debating whether it should be a whole day program, half day, in the morning or in the afternoon. In the experience of the Netherlands and Sweden attendees tended to leave earlier when the event was organized in the afternoon. Interviewee 2 pointed out that in the target group a larger proportion of HR professionals are women, and it seems more common that women pick their children up from nursery. Busy professionals might also see it as an opportunity to go home early.

Interviewee 2 made an interesting suggestion that could be tested in further events. Instead of hiring venues EF could organize an event in co-operation with one of its existing clients, in the other words the client company would host the event, which in itself would highlight the close relationship with clients. Both companies could benefit from the event attendance and create awareness among new target groups. If client company hosted the event they could also bring speakers. This arrangement would require that the client company is centrally located as EF normally uses venues in the city centre.

In circumstances where EF has not yet established a large presence in a country a sponsored event is preferable as EF still lacks numbers in corporate clients and many new discussions and contracts are needed. Interviewee 3 had the varying opinion that sponsored events are preferable because even if you win only one new client it is worth it. In the Netherlands previous year they spoke to around twenty companies in one-to-one meetings that otherwise they would not have been in contact with. Due to the limited marketing budget next year they are planning to use a little bit of everything; more with HR events, joining a network, networking lunches with senior positions and marketing campaigns. An EF-run event where all the participants are existing clients is less beneficial. In Finland and Sweden country managers feel that at the moment it is better to organize their own events so that EF can invite exactly who they want. They already have the larger companies they want as their clients. In Sweden they are considering trying out sponsored events but are emphasizing the need to find a good match which to date has not yet happened.

4.3.2 Case study: Frankfurt event

A detailed description of the entire event planning process in Frankfurt 2018 is available in the attachments. In 2018, the event was supposed to be arranged in March, but was cancelled around three weeks before and re-scheduled because of the low number of attendees. The fact that the previous event was cancelled, this made the observation process more relevant for the future event.

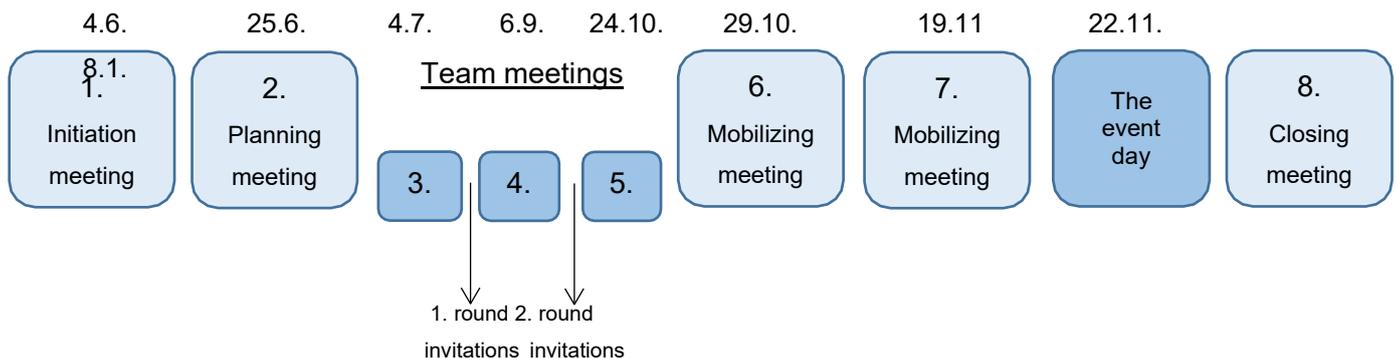


Figure 10. Event project timeline

The figure above presents the timeline of meetings concerning the event in October 2018. Bigger boxes present the general meetings where all key people related to the event participated while three smaller boxes present team meetings with the country team in which event planning took place. The non-participant observation method as a case study provided information of the current structure of the event project.

Overall, the event seemed very good and the content was appreciated. The event had a good atmosphere and worked well from a branding perspective. The speakers were raising interest among people and the venue (Villa Kennedy) added extra value to the event. There are still struggles in attracting clients to attend an event and EF has still more to gain from company X's connections. They also must connect dots (different speakers and activities) together and communicate better in advance. (Salo 1 July 2019.)

The process as a whole had many good features and it was clear that they utilized their prior knowledge of possible pitfalls to their advantage. As the Program Manager posited during the last interview, the main problems seemed to revolve around the unstructured nature of the process and too many people being involved in the preparations. Many different parties such as team Germany, the events manager and representatives from company X were

working closely on the event. Everyone contributed a little bit to everything and managed issues that came up during the process. This system has to be improved upon by someone taking a clear lead, possibly defining two people, one from EF and the other from company X with clearly defined areas of responsibility as well as milestones of the timeline. A lot of effort was put into the project, and based on the interviews many things were specifically reconsidered based on the previous, cancelled, event as well as those of prior years.

Some improvements are still needed. The number of attendees was still fairly low and there was no tangible benefit gained from the event, for instance, new leads. I would argue that from a branding point of view the event was very successful as the client feedback was very positive. The panel discussion never came together in its originally planned form, although the attendees did not seem bothered by the last-minute changes and appeared satisfied. However, it highlights the fact that the organizers should have planned an alternative session much more in advance than they ended up doing. In order to coordinate with all the speakers and be able to connect the sessions with each other in the best possible way, it would be highly beneficial to receive the presentations at an earlier stage. One person could then take the responsibility of going through all the presentations and would have sufficient time to make suggestions to shape the speeches to better relate to the audience and guarantee the smooth transition from one presentation to the next in order to make the program better as a whole.

Some small details were not considered carefully in advance, such as how to share the contact information afterwards. While this level of detail seems inconsequential, every aspect should be considered in order to positively impact EF sales and to ensure maximum benefit to event participants in the form of added value.

Interviewee 4 stated that the feedback call between the key people organizing the event was difficult to organize. As a result Interviewee 4 was the only one attending the event amongst the people in the feedback call. The Regional VP sent their feedback input prior to the feedback call as she knew that she would be unable to attend (appendix 2). Despite their best efforts to organize the feedback call, the event organizers actually attending the event did not take part in the call and since they may be organizing future events in collaboration with each other, it would therefore be useful to summarize the past event together.

The feedback from the audience was collected by displaying the link in the last slide at the event and requesting the attendees to spend five minutes filling in the feedback survey. Unfortunately, this proved to be an inefficient way of collecting the feedback as only one person

did it right on the spot. Others had to be reminded afterwards included in the thank you email. While every guest of EF responded, many of company X failed to submit feedback. Interviewee 4 states that they are certain of the fact that the representative of company X had sent out the thank you email but was unsure to what extent the attendees were pushed to reply and follow up. Here we again raise the importance of communication, which was also detected during interviews.

The level of collected feedback was fairly low, but the feedback received was pleasing from the organizers' point of view. The feedback was very positive and, on a scale of 1-5, the seminar overall was rated at 5 (the best rating) by 7 out of 8 participants. During my interview the main question regarding this feedback centered on the possibility that the critical feedback was missing as more than half of the event attendees failed to give feedback. Our discussion concluded that it is probable that the most satisfied people are more likely the ones to give feedback and that it is faster for them to complete the survey. Positive feedback is quicker to submit and for anyone with criticism or people who simply did not care for the event, the barrier is higher to start the survey. Any constructive criticism would form a base for improvements in the future and would be helpful in finding ways to make the events more attractive. The key question is how to get the feedback in the most efficient way from all the event participants.

5 Conclusions & summary

The aim of the research was to conclude on key elements for EF Corporate Solutions when organizing local events in the selected Northern European countries. As discovered during the interviews and when observing myself how the events are organized by EF Corporate teams, the event organizing process is not very structured and many things are taken care of along the way or when a question comes up or upon the realization that something is missing. In addition, a standard timeline is missing. The qualitative approach aimed to research critical points to consider based on the interviews and provide the event project managers with a tool (the event project manual) to organize and structure an event process as well as ensure that all necessary points are considered carefully.

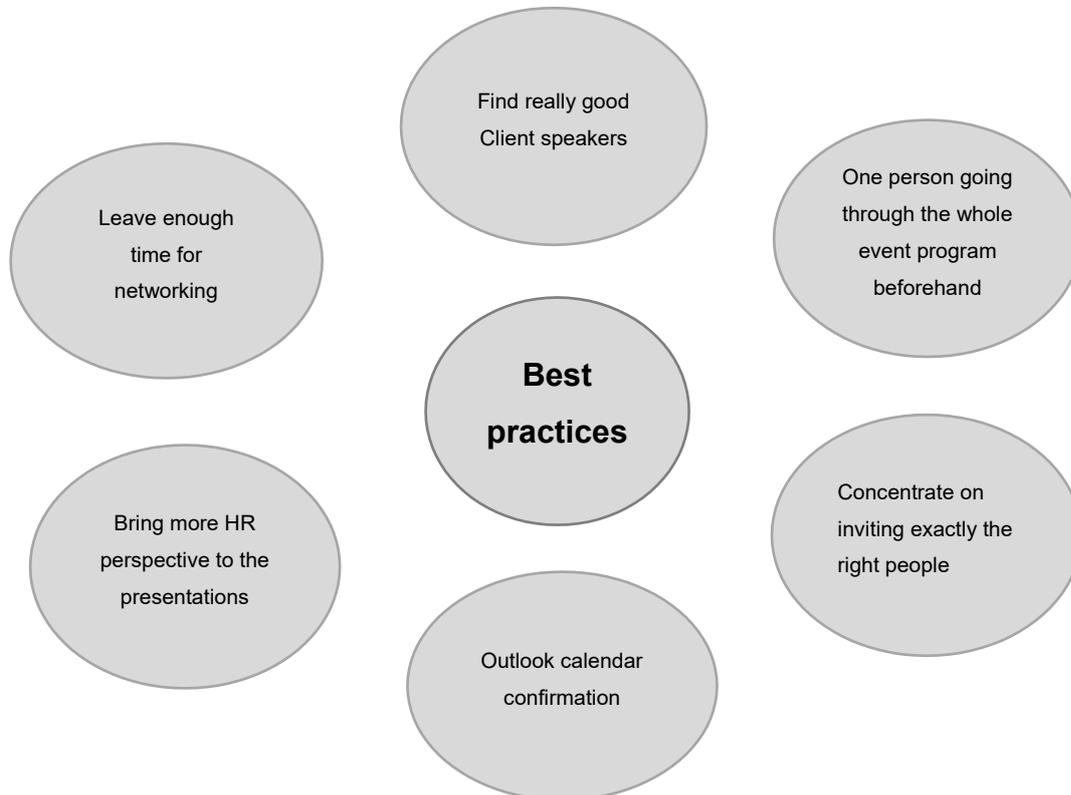
Based on my own experiences and according to some of the country managers, customer cases are quite often underestimated. At the Salesforce base camp I asked people about the number of customer cases which was really high. Every second speech was a customer case and all the respondents felt they were relevant to the event.

As noted, the main concern was centered on what the real value of events is. There are many possible ways to improve and get actual benefit out of the events. Events definitely have a big impact on clients and even though they may not result in sales directly at the event, events are still likely to have an invisible effect on sales. It is also important to remember the branding element. Even if the clients may be existing customers, these events provide an opportunity to show EF as a large and important operator.

As interviewee 4 mentioned, salesforce emails are a good way to reach a lot of people but their actual clients have to be contacted directly reaching them by email and calls as otherwise it will not work. At the end of this research process I would say that this rule should definitely apply not only to existing clients, but to prospective clients too. As the acceptance rate in response to the invitation is higher when the guests feel valued and very much welcomed to the event, in addition to seeing the event as beneficial, teams should really put effort into chasing prospects. A personal relation with potential clients most likely does not yet exist so the event organizer chasing and putting effort into getting them to attend may be seen as even more important. Showing that it is important for EF that the guest attends and making them feel special can help gain return on the investment.

5.1 Improvement suggestions

Country Managers shared their suggestions of their best practices that are relevant for all countries. Some already follow these practices but not all. As the manual provides general instructions, it is suggested to adopt all points, presented above, in each country.



As stated, the unstructured process is one of the concerns and, consequently, by following the instructions of the manual the solution is provided. EF teams may already define a clear split of responsibilities in the initiation and planning phase. Internal and external communication of the event must be highlighted, especially the co-operation with company X. Even though some interviewees were uncertain of how much time and effort they should put in, attracting prospects should be heavily invested in. For instance, in Germany they are following-up key clients by phone calls, after the invitation, but this must be also expanded to prospective clients. In the invitation process, regardless of how guests are invited, it is important to make them understand, what they will benefit professionally and why they definitely should attend the event. The company seems to have a lack of risk management in the event planning process and the particular action should be considered during the planning phase. Events must be summarized together with company X at the end of the event project and they should not underestimate the importance of client feedback in order to improve further events.

The country managers are advised to give more time and thought for the event process and how to better relate decisions made to increase sales. All decisions made must be adjusted with the objectives of an event. Analyzing and monitoring the process should be done systematically and the manual also provides event tracking instructions in order to help. Determining more specific short-term goals, that are measurable and easy to track, should be included in all event projects. This action will help to keep track of the return on investment at the organizational level and guide actions systematically toward better results.

Many lessons are still to be learned but overall events are an effective way of marketing and if they utilize events to contribute to their sales objectives by measuring vehicles (how to get there), how to monitor, and trying to find innovative ways to execute the event, it can easily bring a high return on the investment even though it may be hard to measure and see a clear benefit.

Improvement ideas in practice

In 2019, even though events in Sweden and Finland were considered to be very good before, country teams were able to make a considerable improvement in the number of participants and the event organizing process itself. Also, the event in Frankfurt 2018 was better organized than previously (except Düsseldorf) and many lessons were learnt from previous events. I would posit that the biggest reason was that when discussing about the best ways to organize events, the topic of improvements was at the top of the country managers' list and this naturally helped to improve seminars as much more thought was given to it than before with careful analysis. Some improvement suggestions were given by me following my insight to the theory of the event project cycle and information regarding events shared on a larger scale between countries.

Some improvements were definitely the result of lessons learned from mistakes from previous events. They are still quite new in the event management business and learning how to do it is a continuous learning process. During the process of this thesis, some improvement suggestions were given to the teams in Finland and Sweden before executing events in 2019. Both events were very well organized and the events themselves had a huge impact on sales and booking meetings. The biggest struggle in all countries seemed to be the number of attendees and cancellations and the aim was to find a solution during the writing process of this thesis in order to ensure better success in the future.

Increased communication with participants seemed to have a very positive impact as Finland managed to get 80 participants with only 6 cancellations. As the aim is also to widen presence of EF in client companies, the team invited their existing contacts to the event but also requested them to forward the invitation to other employees of the company for whom they saw this event relevant. Many invitees were not able to attend but when they forwarded the invitation to other colleagues, new contacts came along. Interviewee 1 (2019) sees defining the next steps with each contact relevant as suggested. Among the guests there were many prospective clients and team Finland managed well in getting registrations for the event. The Country Manager attended an event that had similar topic as theirs', and managed to attract other relevant people to continue the discussion of the same topic at their own EF event.

A few days before the event, Team Finland was asked to go through all the guests on the list and define at least one goal for each participant in order to lead the team at the event to exhibit purposeful behavior and actions. This made sure everyone in the team was aware of each guest and the current situation with the client as well as what the objectives were for each client. This made drafting the round table seating plan easier to ensure that the right people such as good contributors and prospects were located at the same table so that the contributors could convince the prospects. According to the Country Manager of Finland, company X got many new dialogs on from the event and found the short description of each participant helpful. They have confirmed multiple meetings with prospects and new contacts as well as existing contacts.

An impressive addition to this methodology was the decision to promise all the event guests the delivery of a book by the keynote speaker as a complimentary gift to anyone who wanted one. This was done in order to reach the short-term goals of meetings and continuing the dialog with clients with the aim of the books being delivered in a subsequent meeting with each event participant. In order to collect feedback efficiently, they promised clients who completed the feedback survey would receive the book. This was a really good attraction created to utilize the event in the longer run and collect as much feedback as possible. From clients' requests, the team decided to arrange a separate workshop where they continue the discussion of the topic and are able to hear and share best practices among the client companies. The team has planned to continue this HR Community created by the event, and suggest a chat group. By using very well-prepared and engaging work, it helped to maintain a dialog with clients and prospects long after the event.

The interesting point that we were eager to see the results for in the Stockholm event in 2019 was the earlier start in planning the event. As this time they started inviting people at an earlier stage it was assumed that it would have an impact on the number of attendees. Even though the number did not seem to increase noticeably, according to the Country Manager this time they reached people in senior positions with a high decision-making capability. As a result, we can assume that when EF wants to attract senior people to the events, the invitation must be received well in advance. In previous years the invitations were sent out approximately 2 months before the event whereas this year the save-the-date invitation went out almost 4 months before.

Feedback collection was also often discussed during this study process. The suggestion, not delving too deep into the problem, was to collect feedback in smaller batches. This means that the company should divide feedback questions in easier and faster batches so that clients would have a lower barrier to start answering, as it does not take as much of their time. The Web Publishing and Events Manager adjusted this thought to the global event in a sense that feedback was collected after each day in a longer seminar instead of requesting feedback after the whole event. This action seemed to have a slightly positive impact.

5.2 Research & Product Development

The manual will be managed by the Events Manager for EF Corporate Solutions and updated accordingly. The manual is designed for the Northern Europe countries but has a great potential to be adapted to other countries with minor changes dependent on the market in each country. The manual provides information in detail, covering the wishes of Events Manager. The manual aims to be a handy tool for the event organizers at EF Corporate Solutions but also act as an inspirational internal marketing tool. In order to make the manual suitable for people who have no previous knowledge or experience of events organization, all phases are described specifically.

The manual will be handed out to the design team of EF Corporate Solutions, which will improve the visual look of the manual in a professional way. As the focus of the thesis was on research instead of what is a good manual, the design team will work on the manual over the summer, but keep the structure and content. Subsequently, the manual will be ready for use for the next fiscal year, starting in October 2019.

This research focused on collecting valuable information from event professionals inside the organization. However, as the study collected main elements and steps of the corporate

event management, and detected the largest issues in organizing events, the future research may be developed to cover clients' perspectives. The interviews were questioning whether country managers were aware of clients' motivational reasons to attend and understand, the clients' desire, or events are organized without determining specifically, how to attract more attendees. Therefore, it would be a significant improvement for the study to examine the subject by interviewing clients or implementing a questionnaire. Some more specific details of the event process were questioned such as, how to collect feedback more efficiently. The following survey can dive deeper into these specific issues of the event process.

5.3 Research Reliability

The study utilized three different research methods: interview, observation and hypothesis testing. As the events acquire a social nature, qualitative research seemed more relevant for the study. Gaining an understanding of reasons, opinions and motivations were an integral part of the research, and the qualitative approach covered trends in opinions by delving deeper into problems. Unstructured and/or semi-structured methods are commonly used in the collection of qualitative data, as this seemed to provide the most relevant research results for EF. (DeFranzo 2011.)

According to some, structured observation offers more reliable information than interviews and/or questionnaires in terms of accuracy regarding duration, timing and frequency with greater accuracy in the time ordering of variables; and more accurate and economical reconstructions of large-scale social episodes that were relevant in order to structure the event process. (Bryman & Bell 2015, 288.)

As interviews provide information according to emotions and memory, the information can be unreliable and inaccurate. Therefore, structured observation was taken along with interviews in order to clarify the exact duration and sequence of actions. Interviews concentrated on asking for instance motivational reasons that cannot be measured by observation techniques.

Most commonly, standardized interviews are used aside of qualitative research because of the non-appearance of standardization when asking the questions and recording of responses making the interviewees' answers difficult to process and to aggregate. Also, in this instance, a slight hazard exists that interviewees' replies are not processed in the exact manner, how they meant to reply. The grounded theory analyzing method requires sensitivity

to contrasts between the emerging categories. However, semi-structured interview type provided with a possibility to make latter questions and clarify their answers in order to develop the reliability, if some response was unclear. Recorded interviews were listened through several times.

Even though semi-structured interviews can provide inaccurate and non-participant observation incomplete information, these methods combined together provided more reliable information and fulfilled each other giving information that the other technique was lacking. The case study, Frankfurt event 2018, did not provide complete information of all details, as observation of the process took place in another country and the observer was not involved in the social setting. Consequently, the reliability of this single method is weak. However, as stated earlier, the interview with a key person of an organization process provided unclear details. The Frankfurt case study can be implied to other countries from many aspects.

After implementing observation and interview research and, consequently, creating hypothesizes, the reliability was slightly uncertain. Therefore, the improvement findings and ideas were presented to the key people of event management and improvement ideas tested at events in Finland and Sweden (2019), in order to create a more reliable guide book. However, many improvement ideas were tested at the same event, and clearly contributed positively as a whole, but left an uncertainty of the real impact of a single action.

The empirical part provided events professionals at EF with a valid information of current attitudes and opinions as well as the event process itself. The manual will ease the work load of the central Web Publishing & Events Manager, clarify events organization for event project managers at EF and assists to achieve better results. Therefore, the validity of the study is high.

5.4 Learning

The framework gave me an overview of events management from a project management perspective and clarified all needed considerations of events management. Theoretically B2B events management did not seem to be complicated (especially free-off-charge events) but moreover the framework reminded me of all steps of the process and ensured that every detail is thought through.

The study made me understand, how important it is to relate all decisions made to the objectives of the event in order to gain the highest possible return on investment. Consequently,

the key consideration is how do all the decisions support these objectives, and any decisions should not be made outside of the goals of the event.

During the process, many features of Word became more familiar, and in the future, I will be able to use the program more efficiently. During the writing process, I was able to make a considerable improvement in my English writing skills by reviewing repetitive mistakes in the text.

As the study involved people from multiple different locations, the process provided a good lesson in dealing with a variety of nationalities. Different research methods and their suitability are more familiar now and the empirical part of the study provided a deeper insight into the current practices in the company.

All in all, handling a large-scale research project provided important lessons in the structuring process, scheduling, and appropriate sequence of actions, time management, confining and focusing on the relevant considerations. Creating the manual proved to be a much more time taking than assumed. In this sense, for the next similar project more time will be reserved.

As the study involved creating the final product besides the research nature, the thesis was looking for the main focus for a long time. In the beginning of the process this was aimed to be more product type of work, but along the way the research played clearly a bigger role. Consequently, for the design and outlook of the manual were not paid much attention. Regardless of the success in the thesis process, the original plans should have been done better and limitations considered carefully as the project was very wide from many aspects.

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7 Appendix Pages

Appendix 1 Case Study Frankfurt Event 2018

Cancelled event

EF Corporate Solutions had planned to hold the event on 26 April 2018, but cancelled about 3 weeks before the scheduled date. The reason for the cancellation of the event was the low number of confirmed attendees, of which there were only approximately 10. Several factors contributed to the low number of event participants.

According to interviewee 4, the Program Manager of Germany, Germans do not seem to be event oriented people, with the usual excuse for not attending being their current workload and not having time to attend events. It may be that this is due to hierarchy with their position in the company not allowing them to decide for themselves whether to prioritise attending the event over other duties. Alternatively, it is possible that this is used as a convenient excuse when the event content is not sufficiently attractive to entice them.

The feedback received on the topic was clear; the high level strategic content of this particular event was not graspable by HR people. It is not customary for EF events to have this type of high level context topic. 'Strategy, From Key Drivers to Delivering Results' as a topic was clearly too vague for the HR people with whom EF works, leaving the clients unsure of what to expect and what should be discussed at the event. Another reason for the low success rate might have been that another company was organizing an event near the time of the EF event date.

Learnings from the previous events

In regards to the events of previous years, the communication and cooperation with company X has clearly been problematic. In the example provided by interviewee 4 at one event the list of participants, according to which interviewee 4 had printed out nametags, was incorrect. Many people not registered on the list turned up while others expected to attend according to that same list failed to show. This resulted in a chaotic situation at the actual event. The next chapter will discuss actions taken for improvement to guarantee better alignment at the event in October 2018.

The first organized event by team Germany was in Düsseldorf, which was regarded as quite successful. According to interviewee 4 the atmosphere was good with positive vibes and people were blown away by the speakers. The marshmallow work shop organized by company X was also very well received. While the event did not have a high number of attendees, they were considered to be the exact right people from the organizers' point of view.

In the Düsseldorf event, the guest speaker from unknown company was supposed to present the story of the language training in their company. Despite the guest speaker having to cancel and not be able to make the presentation on that occasion, the crucial lesson learned was that a guest speaker from a well-known company can help EF attract clients to attend their events. It is argued that this speaker was the reason that many of their other clients were eager to attend the event to be able to hear the story of another successful organization. A good client speaker can be a considerable factor in attracting more registrations for the events.

Description of an event project in Frankfurt 2018

This description of the event project cycle for the event in Frankfurt aims to perceive the timeline and outline the efforts made for the event as well as establish areas for improvement. This event was earmarked for the observation and description process due to the timing of it which coincided with this thesis. As the author of this thesis my role was that of a silent observer throughout the whole process. I attended most meetings, received emails related to the event and conducted two interviews with the Program Manager of Germany, one preceding the event and another following the event feedback call. This was in order to get a better understanding of meetings which I was unable to attend and the event day itself. It was recommended that Interviewee 4 was my main contact based on their experience of events in Germany and close participation in planning the event itself.

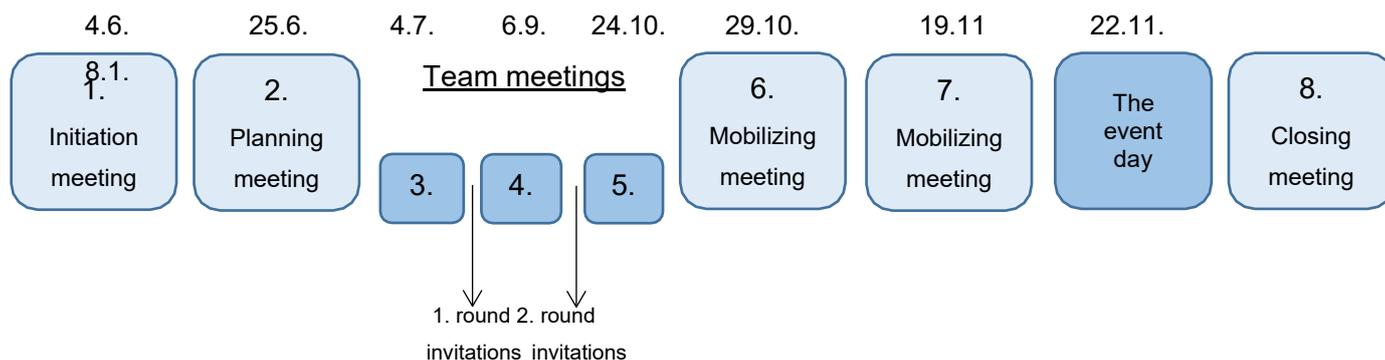


Figure 10. Event project timeline

The figure above presents the timeline of meetings concerning the event in October 2018. Bigger boxes present the general meetings where all key people related to the event participated while three smaller boxes present team meetings with the country team in which event planning took place.

Initiation and Planning meetings

The first meeting concerning the event was held on 4 June 2018. In this meeting, the main topic was going through the issues that had contributed to the cancellation of the previous event and how to avoid repeating the same mistakes. This was followed by a discussion on the possible topic for the event and drafting the agenda. The venue, Villa Kennedy, which had been booked for the previous, subsequently cancelled, event agreed to allow EF to change the original booking for a small extra fee. Hence the venue for this event was predetermined and no discussion on it was needed.

In the meeting, the event planners provided suggestions on interesting speakers justifying their reasons for why these particular speakers would fit in the event program. Additionally the budget and the price policy of the speakers were discussed. EF and company X seemed to have different views on the preferred topic of the event, whether the 'Future of Learning' or something more specific, for instance, 'AI in Learning' would be best suited.

After the first call, The Events Manager summarized the topics, planned speakers and next steps in an email which was shared with everyone who participated in the virtual meeting. The next meeting was planned to be held two weeks later and the next steps listed below were to be completed by the next meeting. At that time, the draft topic was 'The Impact of AI in Learning'.

- Would research by company X be ready by then?
- Confirmation of panel participants
- Check with the proposed guest speaker whether they can present about anything AI related or would be happy to participate in the panel
- Check if the draft topic is suitable for the German market
- Decide on how much time is needed for the content delivery (after the confirmation of the availability of the speakers and the topics) (Kulikova 4 June 2018.)

Between the first meeting and the next follow up meeting, team Germany did small-scale market research by asking key clients regarding the topic and their interests. The feedback received was that the theme should somehow capture the value added to the participants. Clients commented that there were currently many events regarding AI and the topic should really add value to their work. The Events Manager of EF was tasked with checking the availability of speakers. The original aim at that time included confirming the attendance of panelists, however, the panel discussion was subsequently cancelled.

The second meeting was held on 25 June less than three weeks later where Interviewee 4 shared their clients' comments on the topic with the other event planners. It was then agreed that AI was not going to be the headline topic although one of the speeches may feature it or be included in the panel discussion. The agreed topic 'Future of learning' had to be shaped to be more provocative. After the second meeting the Events Manager again summarized the meeting via email and presented the draft of the event day agenda asking for additional comments and suggestions before making the save-the-date announcement. The next steps were determined along with the allocation of responsibilities as follows:

- Check availability of the proposed key note speaker and their cost (xxx)
- German teams to cooperate on the panel invite list
- Find a speaker from EF (xxx) (Kulikova 25 June 2018.)

Invitations

It was important to make the Save-the-Date announcement before the summer holidays as the event organizers felt it would be too late when people return back to work from holiday.

On 17 July, the Events manager sent out both drafts of the invitation produced by the central marketing team in order to get improvement suggestions from the other event planners before finalizing the invitation. At this point the other keynote speaker had yet to be confirmed so the invitation lacked information on the key note speakers. The Keynote speakers, Riaz

and Paulo, were to be added to the invitation at a later stage once Riaz was confirmed. The changes requested were more a disruptive image and displaying company X's logo more prominently. Within the same day Riaz Shah confirmed his participation and the next day two different versions of the revised invitation inclusive of the key note speaker information were provided to the event team. From these two options the event organizers chose their preferred one, which is displayed below.






- AN EF AND ASHRIDGE SEMINAR -

**The Changing Workplace:
Preparing your organisation
for digital disruption**

Sign up here



Riaz Shah

Riaz is part of the Adjunct Teaching Faculty at Ashridge Executive Education. At Ashridge, Riaz has led sessions recently with clients that include Continental AG, Dubai Government, essayjet, EF, Lufthansa, Munich Re, Pearson, Tesco, UK Civil Service, and Ashridge's Senior Executive Program. He specialises in teaching digital disruption, global megatrends, innovation, and the personal leadership and corporate responses to an increasingly VUCA world.

He is currently a part-time senior partner at EY, the global professional services firm, and has over 30 years' experience in global management, talent, technology consulting, change management, and auditing. In this time, he has held senior roles such as Managing Partner of London Assurance, EMEA COO for Markets, Global Learning & Development Leader, and Global Talent Leader for Assurance. He was included in the 2018 UK Part-Time Power List.

Riaz has also taught Executive MBA and MBA students at Hult International Business School, and is a frequent speaker at London Business School.

He recently opened a free school in London (www.OneDegreeAcademy.org), advises several start-ups, and is a board member of the Bright Ideas Trust and Common Purpose. He is a Fellow of the Royal Society of Arts, an alumnus of Singularity University's Executive Programme, and a member of Harvard Business School's Global Alumni Board.



Dr. Paolo Gallo

Associate Professor of Organizational Behaviour, Executive Coach and best-selling author. Over the last 15 years, Paolo Gallo has been CHRO at the World Economic Forum in Geneva, CLO at The World Bank and Director of HR at the European Bank for Reconstruction & Development, with prior experiences at the International Finance Corporation and Citigroup.

Paolo has worked in more than 80 countries and currently collaborates with Hult-Ashridge (UK) and Bocconi University (Italy) business schools. Paolo writes for the Harvard Business Review (Italy and Arabic) and is a regular contributor to the World Economic Forum Agenda Blog, Forbes Magazine and LINC Magazine Italy on themes related to executive coaching, careers, the future of work, leadership development, resilience and well-being in the workplace, creativity-decision making, public speaking and organisational culture.

Date 22 November 2018

Location Villa Kennedy, Frankfurt

We look forward to welcoming you at our EF and Ashridge seminar in which we will be discussing the future of the workplace, including the impact of emerging technologies. Speakers include experts in the field, such as Riaz Shah, Partner at EY and Adjunct at Ashridge Executive Education and Dr. Paolo Gallo, Associate Professor of Organizational Behaviour at Ashridge Executive Education and former CHRO of the World Economic Forum Davos.

09:45-10:15	Registration and networking
10:15-10:30	Welcome and Introduction
10:30-11:00	Introduction to the disruptive technologies
11:00-12:30	Humanity and technology
12:30-13:30	Lunch
13:30-14:30	Emerging technologies in EdTech
14:30-15:30	Panel discussion
15:30-16:30	Networking reception

Figure 11. Frankfurt event invitation (2018)

Invitations were sent out to clients in two separate batches. The first batch of invitations was sent out to the entire Salesforce database with all individuals included. According to Interviewee 4 this was a good way of reaching inactive clients. Although on this occasion it did not result in any registrations from inactive clients, it did yield a good response rate from existing active clients. After the first emailing, team Germany sent direct invitations personally to their key clients with follow-up calls. In situations where the Key Account Manager had a meeting with a client who had yet to respond to the invitation, the event was always mentioned and a response requested. Approximately one month before the event day, on 17 October, a second round of invitations were sent to everyone in the database with the intention of a final push.

Following the second round invitations there were no new registrations. The personal view of Interviewee 4 is that while these salesforce emails are good way to reach a lot of people, their actual clients have to be contacted directly and repeatedly by email and calls as otherwise it will not yield the desired result. In any case, considering follow ups the Salesforce emails are a good way to activate people they are not currently working with by reminding them of EF's presence in the market place.

Organizing a LinkedIn campaign was considered, but based on their experience with a previous event it was unlikely to be successful. For the first ever event they had organized, they ran a LinkedIn campaign and while receiving five registrations from it, none of the five showed up for the event. Team Germany was neither acquainted nor had any kind of relationship with these individuals which made it easier to not attend, especially as these events are free of charge.

The events are always advertised on the corporate websites of EF and company X. Additionally at least EF posts the event on their LinkedIn corporate page followed by everyone in the team sharing the post personally.

For the Düsseldorf event LinkedIn messaging was utilized but with little success. According to Interviewee 4, in terms of sales this trend is changing with many accepting the request and responding which did not happen two years ago. This shift in the trend indicates that it might be worth trying LinkedIn in-mailing again in regards to events. However, the theory was not tested for this event.

Team meetings

Team Germany held three meetings with their own team to plan the event. Team meetings are a regular activity at EF Corporate Solutions, making it normal to plan and go through things related to the event with the country team during these meetings.

As one of the actions taken for improvement on the previous events due to the difficulties in communication and alignment with company X, the representative of company X started to participate in the EF team meetings by calling in. The aim of this action was to strengthen the co-operation in regards to communication and alignment to avoid problematic situations.

In the first team meeting on 4 July, the representative of company X called in for 30 minutes to discuss and agree on the topic of the event and the agenda that they would like to move forward with. The Regional Vice President provided the information via email to all other event planners who did not attend the team meeting in order to give an understanding of what had been discussed and what questions were raised. In this meeting they also defined the specific companies both stakeholders would approach to obtain guest speakers for the event.

Interviewee 4 found this improvement action on the first call helpful and much needed since they were co-operating in the sessions to build the agenda as well as discuss the delegation of responsibilities to each member of the team. The issues discussed with the representative of company X included the invitee list and the list of guest speakers along with the division of responsibility for securing the individual speakers. Prospective participants for the panel discussion were also discussed, but did not result in any concrete candidates. The subsequent calls in further meetings had less impact and were not found to be useful.

Mobilizing meetings

On 29 October a so-called mobilizing meeting was organized to go through the agenda and practical arrangements. For instance, the technical set up was discussed to ensure they had sound and microphones. They also finalized plans for the afternoon networking; what it should be like and the kinds of snacks and drinks that should be offered. They planned what the gift bags should contain and who would be bringing roll-ups. An important point also discussed was which of the speakers should moderate the panel discussion. They allocated upcoming tasks, for instance giving company X the responsibility of ensuring that the speakers are aware of the booking and travel arrangements made for them. The decisions were made of who would present EF & company X introductions as well as who should

moderate the event program in the other words, connecting the sessions together and giving all practical information to attendees. A final push for the panel discussion was also decided upon identifying who could be brought in for it and who should be pushing for it.

The email summary provided of the meeting proposed welcome bags and materials needed as well as banners and where to get them. Separate from this meeting, afterwards the question was raised as to how they should collect feedback, whether it should be printed forms or via SurveyMonkey which EF usually uses.

By 8 November only one panelist's attendance had been confirmed and they were still pushing for 4-5 others. On 13 November, the Program Manager raised the points of setting a deadline for the panel discussion due to the difficulties in getting people to participate and finding alternative ways to execute it in a more interactive way with the audience. On 16 November, six days before the event, a consensus was reached on scrapping the panel discussion as it was clear that it was not going to work out. This left the team with only three working days before the event to plan a replacement session.

The event day

09:45-10:15	Registration and networking
10:15-10:30	Welcome and Introduction
10:30-11:00	Introduction to the disruptive technologies
11:00-12:30	Humanity and technology
12:30-13:30	Lunch
13:30-14:30	Emerging technologies in EdTech
14:30-15:30	Panel discussion
15:30-16:30	Networking reception

Figure 12. Frankfurt Event Agenda

They implemented short question breaks after each session round or even between presentations in case the audience had any questions. However, most questions already came up during the presentations.

As previously stated the aim was to have a panel discussion but as panel members were too hard to find and get to confirm, the decision was made spontaneously to implement round table brainstorming groups of the attendees being led by the speakers at the event. The speakers set out the structure for these discussions by asking several questions to be discussed in the group and following the discussion, the groups of attendees presented their discussion points to the rest of the room. It was an hour long interactive part of the event. The implementation of the session could have been improved upon had the speakers

been able to coordinate with one another beforehand. However, getting the speakers to send their presentations well in advance has proven difficult as it seems that they tend to prepare them the night before. The event participants are unlikely to have noticed the change in the program as according to Interviewee 4 it ran very smoothly from the audience's perspective. From the organizers' point of view, being more aware of the details, the session could have been done better. However, considering the spontaneous nature of the idea and last minute implementation, it was a success.

Feedback call

Interviewee 4 stated that the feedback call between the key people organizing the event was difficult to organize. As a result Interviewee 4 was the only one attending the event amongst the people in the feedback call. The Regional VP sent their feedback input prior to the feedback call as they knew that they would be unable to attend (see Appendix 2).

According to the Regional Vice President (2019), overall, the event seemed to very good and the content was appreciated. The event had good atmosphere and worked well from branding aspect. The speakers were raising interest among people and the venue (Villa Kennedy) added extra value for the event. There are still struggles in attracting clients to attend an event and EF has still more to gain from company X's connections. They also must connect dots (different speakers and activities) together and communicate better in advance. (Salo 8 January 2019.)

Interviewee 4 felt that it was quite sad that, despite their best efforts to organize the feedback call, the event organizers actually attending the event did not take part in the call since they may be organizing future events in collaboration with each other and therefore it would be useful to summarize the past event together.

The major concern that Interviewee 4 had was that there were "too many cooks", Interviewee 4, the events manager and two representatives from company X. In the other words, too many different people were involved in the organization and attendance as well as the responsibilities and the timeline not being clear enough. Everyone contributed a little bit to everything and managed issues that came up during the process. Interviewee 4 feels that this system has to be improved upon by possibly defining two people, one from EF and the other from company X with clearly defined areas of responsibility as well as milestones of the timeline.

The feedback from the audience was collected by displaying the link in the last slide at the event and requesting the attendees to spend five minutes filling the feedback survey. Unfortunately, this proved to be an inefficient way of collecting the feedback as only one person did it right on the spot. Others had to be reminded afterwards included in the thank you email presented below. While every guest of EF responded, many of company X failed to submit feedback. Interviewee 4 states that they are certain of the fact that the representative of company X had sent out the thank you email but unsure of how much the attendees were pushed for reply and followed up.

Dear XXX,

Thank you for attending our event "The Changing Workplace: Preparing Your Organization for Digital Disruption" in Frankfurt. It was a great pleasure to host you and share our insights with you.

We hope you found the speakers and networking sessions beneficial and we look forward to welcoming you to more events in the future.

Please share with us what you thought of the event by [completing our short survey](#) before or by December. Your response will help us to continue delivering relevant and interesting content to the German market.

As promised please find the speakers' presentations [here](#). Please be aware that the link might take longer to load, due to the file size. Please also feel free to contact me directly if you have any questions and if you are seeking further knowledge or potential solutions around this area for your organization.

We look forward to hearing from you and to continuing working/our conversations with you.

Best wishes,

Figure 13. The email example sent to the clients (Plötz 29 November 2018.)

The level of collected feedback was fairly low, but the feedback received was delightful from the organizers' point of view. The feedback was very positive and, on a scale of 1-5, the seminar overall was rated at 5 (the best rating) by 7 out of 8 participants. During my interview the main question regarding this feedback centered on the possibility that the critical feedback was missing as more than half of the event attendees failed to give feedback. Our discussion concluded that it is probable that the most satisfied people are more likely the ones to give feedback and that it is faster for them to fill the survey. Positive feedback is quicker to submit and for anyone with criticism or people who simply did not care for the event, the barrier is higher to start the survey. Any constructive criticism would form a base for improvements in the future and would be helpful in finding ways to make the events more attractive. The key question is how to get the feedback in the most efficient way from all the event participants.

During the feedback call the best way to collect feedback was discussed, as it definitely seems to be the area in need of improvement. In order to better understand the wishes of the clients and improve further events, alternative ways to collect feedback were suggested. The suggestions included going back to the traditional paper form or possibly creating a QR

code to scan instead of having to type a link on smart devices. It could be more interactive and perhaps it could be done together at the event, showing a question and everybody answering on their app.

Feedback questions as follows:

- What is your name?
- What is the company you are working at?
- What was your motivation to attend the seminar?
- Do you think those objectives were met?
- How likely are you to recommend this event to a colleague or a friend?
- What would you like to hear more/less about?

Please rate our sessions

- Welcome and Introduction
- Introduction to the disruptive technologies
- Humanity and technology
- Emerging technologies in EdTech
- Panel discussion

Please leave session related comments

Location & Setting

- Was the information received before the seminar appropriate?
- Was the length appropriate?
- How would you rate the venue?

Comments?

General questions

- How do you feel the overall seminar was organized?
- Please rate your level of satisfaction in general:
- Please provide any additional comments and/or suggestions for future events:
- What other training topics would you be interested to hear more about?
- Would you agree to us sharing your contact details (name, company, email) with the participants of this seminar?
- Would you like to arrange a meeting with an EF/Company X representative to discuss further how our solutions could be used in your company?

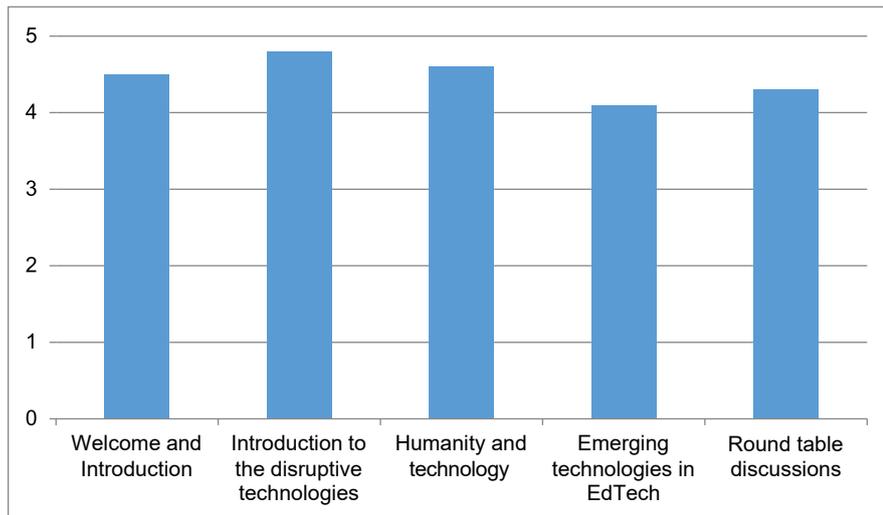


Table1. Session rating Frankfurt Seminar 2018 (Appendix 4)

The figure above presents the ratings of the participants for each session of the event.

Additions

In the feedback survey the participants were asked whether they would like to arrange a meeting with EF or a company X representative. If the client replied yes, the individual who had invited the participant would contact them to discuss what it was specifically regarding and schedule a meeting. If the participant wanted to meet with the representative of the other company the individual would facilitate and arrange the meeting of the client and the other company.

According to Interviewee 4 EF did not obtain any new leads from this event. They are also unsure whether company X was able to obtain any new leads from the EF guests. All event attendees were existing EF clients despite most participants who attended having been invited by company X. The question therefore follows whether organizing these events adds is meaningful if clients are attending the event but are not buying any services.

As mentioned earlier, Germans tend not to be event oriented of which Interviewee 4 gave an example to justify this statement; Team Germany participated in an unrelated event in Berlin where there were only three Germans with everyone else being foreigners. This is indicative of the event culture among Germans. It seems that it is difficult to attract people to not just EF events, but any kinds of events. In recent years they have participated in a variety of different events and fairs, but due to the lack of any great success so far concerns

have been raised as to how much they should invest in it. Alternatively, it may be that they just have not found the right type of event yet.

In the feedback survey the participants were also asked whether they would give permission to share their contact details with the other attendees. In my interview with the Program Manager I raised the question of how the contact details were going to be shared as all of the people who filled the survey gave their permission. Interviewee 4 stated that for previous events they had shared name, email and position to be distributed by email, but as this year they had not discussed this it had not been determined yet. What caught my attention was that this interview was conducted approximately 1.5 months after the event and this had yet to be completed. As this feature of the event gives added value to participants it should in my view be actioned as soon as possible after the event with a maximum limit of two weeks, when the event and the people with whom they networked or had discussions are still fresh on their minds.

Evaluation

On the whole I feel that the event project in Frankfurt seemed to have the ingredients for a successful event as it was. The process as a whole had many good features and it was clear that they utilized their prior knowledge of possible pitfalls to their advantage. As the Program Manager posited during the last interview, the main problems seemed revolve around the unstructured nature of the process and too many people being involved in the preparations. The lessons learned were that someone should take clear lead of the project and that the tasks must be defined and delegated clearly. Many different parties such as team Germany, the events manager and representatives from company X were working closely on the event. A lot of effort was put into the project and based on the interviews many things were specifically reconsidered based on the previous, cancelled, event as well as those of prior years.

Some improvements are still needed. The number of attendees was still fairly low and there was no tangible benefit gained from the event, for instance, new leads. I would argue that from a branding point of view the event was very successful. The panel discussion never came together in its originally planned form, although the attendees did not seem bothered by the last-minute changes and appeared satisfied. However, it highlights the fact that the organizers should have planned a session alternative much more in advance than they ended up doing. In order to coordinate with all the speakers and be able to connect the sessions with each other in the best possible way, it would be highly beneficial to receive the presentations at an earlier stage. One person could then take the responsibility of going

through all the presentations and would have sufficient time to make suggestions to shape the speeches to better relate to the audience and guarantee the smooth transition from one presentation to the next in order to make the program better as a whole.

Some small details were not considered carefully in advance, such as how to share the contact information afterwards. While this level of detail seems inconsequential, every aspect should be considered in order to positively impact EF sales and to ensure maximum benefit to event participants in the form of added value.

Appendix 2. Frankfurt event (2018) Feedback of Regional VP

Hi!

Unfortunately I cannot join the event feedback call today as I have another call I cannot reschedule and have to prioritize.

Here are my thoughts on the event when you have the call w Company X.

- Overall a very good event; people seemed to appreciate the content and were open for discussion, good atmosphere, good branding
- Great speakers and topic was something a lot of people were interested in, even though they couldn't make the date
- Really nice location (Villa Kennedy) added an extra feel to the event

- It was a first time we did a full event 50/50 together with Company X in Germany and some lessons still to learn:
 - o Focus on coordinating the speakers better in advance and connecting the dots (Riaz and Paolo both spoke a bit about the same thing and we missed an interactive workshop which I thought originally was meant to be with Paolo; also we coordinated the panel discussion at last minute although with quite good results; Bob did well but that could have been also better coordinated w other speakers)
 - o EF still struggles to get clients to these events and we have more to gain from Company X's connections, aim to change this with getting company B and/or VW to speak in our next event
 - o Location was great but meeting room a bit "stuffy"
 - o We lacked quality name tags etc. due to the last minute changes with X not being able to arrive – however, not visibly knowing who was from EF made the room feel bigger

I want to keep on having these events as we have to brand ourselves to the selected audience. I do not think we should have another one though before Q1 or Q2 next FY unless Company X decides to have one (in that case we should join with what resources we have) as we have to focus on sales. Getting people to these events will get easier as we win more clients and just having access to one big account like xxxxxxxx that was now present and launching an RFP in January, makes it pay off. We should also think about the location for next time. The most successful events we've had have been in Dusseldorf and while it's hard to say how much the location mattered, I would suggest reviewing the location for the next event. Also we need to make sure the topic is something that relates to our audience in which I think we succeeded this time. Being able to talk about these events and sharing material afterwards to also those who didn't make it, does brand us. Also need to time the event well so that we have the resources to focus on inviting at the right time. I would actually like to see what others would think of Feb 20? For now I'd like to push to have the global event in Europe in Zurich and try to get a couple of German client there.

/xxxx

(Salo 8 January 2019.)

Appendix 3. The email summary of the feedback call

Hi all,

Thanks to all who joined the call this morning.

Here is an EF feedback. Let us know if there is anything else you want to add from company X side. I'm also attaching the summary of the attendees feedback.

- Overall a very good event; people seemed to appreciate the content and were open for discussion, good atmosphere, good branding
- Great speakers and topic was something a lot of people were interested in, even though they couldn't make the date. And we know that topic is important, especially since April topic didn't work at all.
- Really nice location (Villa Kennedy) added an extra feel to the event. Even though meeting room was a bit "stuffy"
- It was a first time we did a full event 50/50 EF and company x in Germany and some lessons still to learn:
 - o Focus on coordinating the speakers better in advance and connecting the dots (Riaz and Paolo both spoke a bit about the same thing, we thought that Paulo's presentation would be more of a workshop; also we coordinated the panel discussion at last minute although with quite good results; Bob from EF side did well but that could have been also better coordinated with other speakers)
 - o EF still struggles to get clients to these events and we have more to gain from company Xs connections, aim to change this with getting xxx and/or VW to speak in our next event
 - o At some point felt like it was too many cooks. And some things fell between the cracks, like the nametags. On a positive side, not visibly knowing who was from EF and company X made the room feel bigger
 - o Feedback forms collection – still needs to be revised. Paper forms have higher return rate, when we only got 8 responses back (which is still good considering it was 16-20 people?). Maybe to try and use QR code?

We want do another joint event with you, however we do not have resources in this FY. Regional VP proposes Feb 2020, would this work for you? And where shall we do it? Regional VP suggested Dusseldorf and Roxy thinks that Frankfurt is as equally a good option.

However if you have an event before that, we would gladly invite our clients.

Thanks,
X on behalf of EF team

(Kulikova 8 January 2019.)

Appendix 4. Frankfurt event (2018) feedback

2. Seminar Topic & Content	3. Do you think those objectives were met?	4. How likely are you to recommend this event to a colleague or a friend?	5. What would you like to hear more/less about?
To learn the impact of digitalization on the education / training	5	10	I'd like to listen more from Dr. Gallo about thinking creatively and how we can implement such a culture in an organization. more: Concrete examples of practiced new approaches
To get an upgrade and input about the topics. To network.	4	8	less: Technical background information of how the engineers of EF are setting up the EF products- it was a little bit too detailed ;-)
Research for the design/update of new Global Leadership Development Program	4	9	More practical application examples based on results of HULT Research
Insight into digital Revolution consequences	5	10	How to form a way of dealing with the digital revolution holistically (economically but also
Interesting Input & Getting to know Ashridge-Speakers, Networking with other clients	5	10	Deeper insights on measures how to prepare organization for changing workplaces; Best
New Ideas, networking	5	10	It was perfect for one day! The practical approach regarding these topics could be
Networking, inspiration, get to know my EF contacts	5	10	leadership, economic changes,
new insights and learnings update on Ashridges current activities, meet interesting people	4	10	maybe some more academic background/research on topic
	4.6	9.6	

6.1. Please rate our sessions Welcome and Introduction	6.2. Please rate our sessions Introduction to the disruptive technologies	6.3. Please rate our sessions Humanity and technology	rate our sessions Emerging technologies in EdTech	6.5. Please rate our sessions Panel discussion	7. Please leave session related comments	8.1. Location & Setting Was the information received before the seminar appropriate?
5	5	5	4	5	The combination of lectures and table discussions was fantastic. I really want to	5
4	4	4	3	4		4
5	5	5	4	3		4
5	5	5	5	5	great topic, great speakers - at the pulse of the time	5
4	5	4	4	3		4
5	5	5	5	5		5
4	5	5	4	5		4
4	4	4	4	4		4
4.5	4.8	4.6	4.1	4.3		4.4

8.2. Location & Setting Was the length appropriate?	8.3. Location & Setting How would you rate the venue?	9. Comments?	10.1. General questions How do you feel the overall seminar was organized?	10.2. General questions Please rate your level of satisfaction in general:
5	5	Very impressive and great workshop. Thanks!	5	5
5	5		5	4
5	5		5	4
5	5	great event	5	5
5	5	Thanks for inviting and giving the chance to participate in this great event!	5	5
5	5		5	5
5	5		5	5
4	4	I worked very closely with the Ashridge faculty around 10 years ago as a Program Director for customised programs for DB. Pleased to see that Ashridge is still a very good choice regarding Exec Ed.	4	4
4.9	4.9		4.9	4.6

11. Please provide any additional comments and/or suggestions for future events:	12. What other training topics would you be interested to hear more about?	13. Would you agree to us sharing your contact details (name, company, email) with the participants of this seminar?	14.1 Would you like to arrange a meeting with an EF/Company X representative to discuss further how our solutions could be used in your company?
		yes	no
Your speakers are consistently engaging and highly professional. In addition, it would also be interesting to gain deeper insights into practical business applications - e.g. an exciting case study	I am on track thank you very much.	yes	no
		yes	yes
		yes	no
		yes	no
Thanks again for being invited!		yes	yes
		yes	no
		yes	no

Appendix 5. The Events Guide Book



ASHRIDGE
EXECUTIVE EDUCATION
HULT

EF Corporate Solution Welcoming you to plan an event Events Manual

Let's get started!

21 March 2019 • 8:30-13:45 (including lunch)
Hotel Kämp, Peilisali, Helsinki

Agenda

Introduction

Success Story

Initiation Phase

Planning Phase

Mobilizing Phase

Staging Phase

Closing Phase

Thank You Words

Example Templates

Appendix 1. Helsinki Event 2019 Invitation

Appendix 2. Confirmation Email

Appendix 3. Calendar Invitation

Appendix 4. Reminder Email

Appendix 5. Thank You Email

Appendix 6. Thank You Email 2.

Appendix 7. Name Plates

Appendix 8. Example Feedback Questions

Appendix 9. Event Tracking Instructions



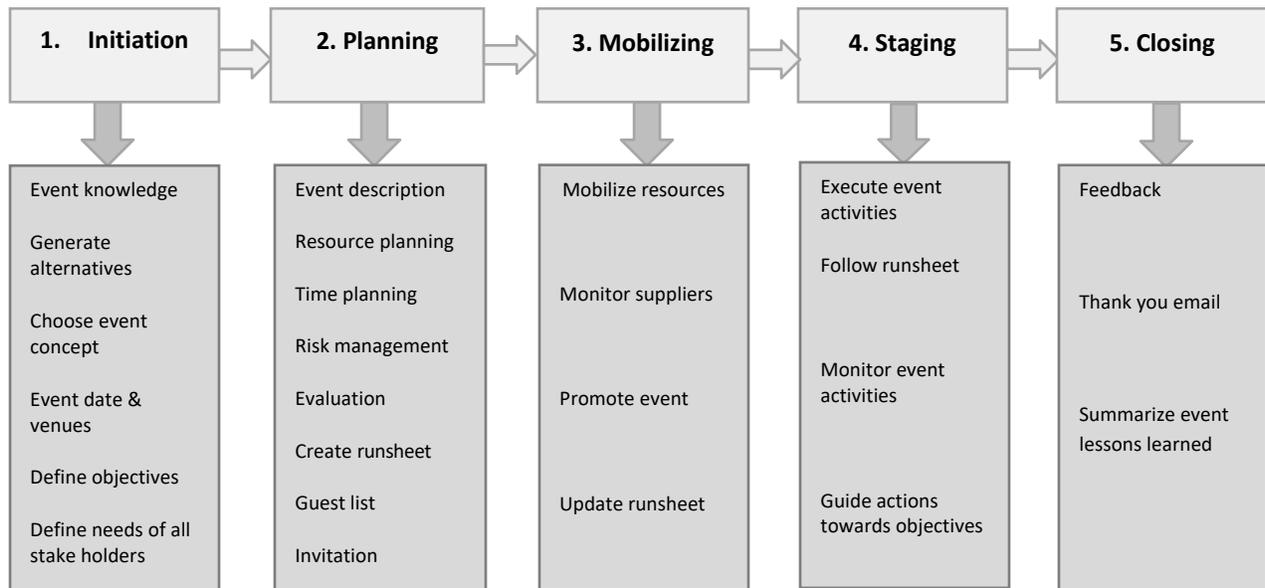
Introduction

This manual was created as a final thesis at Haaga-Helia, University of Applied Sciences, with the help of multiple event professionals at EF Corporate Solutions. The Web Publishing and Events Manager Tatiana Kulikova ensured that the manual matches with needs of EF, and covers all of the required aspects.

Live events are the most effective single marketing action, and therefore can have a huge impact on business. In order to gain the highest benefit out of the event, many details should be considered carefully.

This manual is aimed to help when planning and executing local events. It is good to reserve enough time for planning an event and inviting people in order to make sure clients still have time available in their calendars.

You are guided through all five event project cycle phases presented below, and provided with a useful set of tools, suggestions and check lists. The guide book includes communication material (example emails) from the Helsinki 2019 seminar and templates for use.



Success story

By using a structured event planning process and taking small details into close consideration you can ensure a successful event. By placing emphasis also on the small details, it gives you control of the process in order to better manage results. Efficient internal as well as external communication is crucial in order to achieve these.

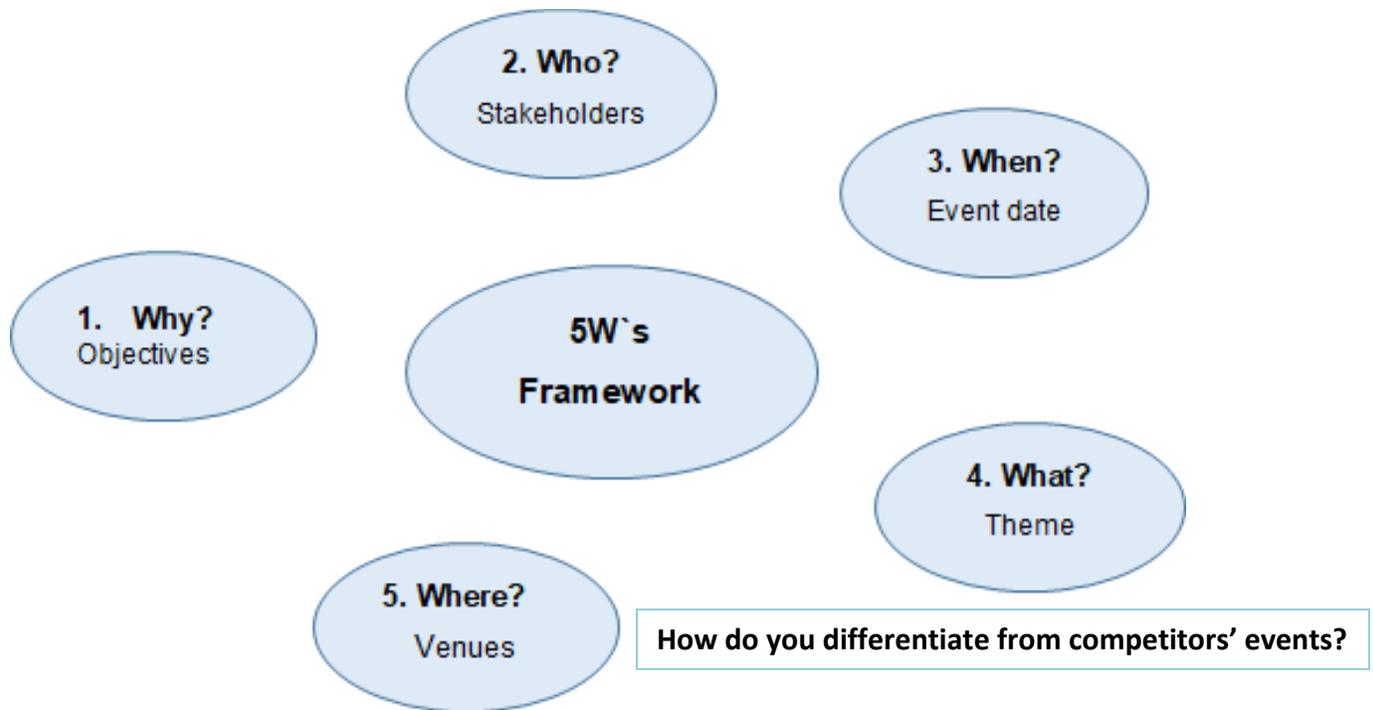
<p><u>Helsinki Seminar in 2019</u></p> <ul style="list-style-type: none">-80 participants (only 6 cancellations)-52 different organizations-9.1 average rating for the event-Multiple new contacts and meetings resulted from the event	<p>The Seminar's success was ensured by paying close attention to attracting clients and prospects to attend the event and giving a lot of effort to invite people through the right channels. A LinkedIn campaign and direct calls to the requested attendees resulted in a very high response rate besides the regular email invitation.</p>
	<p>It was important to make clients feel their attendance is highly valued. Increased communication about the event with the participants and targeting invitations to the right people was also assumed to decrease cancellation rate amongst the event attendees. (See the communication material in attachments)</p>
	<p>In order to ensure smooth running throughout the whole event program, the country manager reviewed all the presentations before the event day and gave suggestions to better shape them in relation to the audience and assuring good program entirety as a whole.</p>
<p>By asking clients to forward the invitation to a relevant colleague(s), especially if the invitee is not able to attend, this ensures new contacts come along. When the invitation comes from their colleague they seem to be likely to read the invitation and attend the event.</p>	<p>In order to get more meetings they utilized the event invitation process as a reason to approach clients. They also promised every event participant who completed the feedback survey a complimentary gift within the following meeting (the book of keynote speaker Paolo). This ensured that the dialog of the event will continue afterwards, more feedback was received and more meetings booked.</p>
<p>From clients' request, the team decided to arrange a separate workshop where they continue discussion of the topic and are able to hear and share best practices among the client companies. The team has planned to continue this HR Community created as a cause of the event, and suggest the creation of a chat group.</p>	

Specific objectives set to each participant were guiding systematically actions and resulted in improved outcomes from the event.

In the best case, the event plays a part in decision making and contributes to getting deals!

Initiation phase

When you start preparing for the event, remember to think about points in the 5W's framework illustrated below.



Budget:

Potential cost categories:

- External speaker
- Venue rental
- Food and beverage
- Gifts (book of a key note speaker as an example)
- Flights and accommodation for internal speakers
- Flights, accommodation and transfers for clients. We usually cover those only for our global and regional events. However we can consider including this in the budget if we have a very important client we want to bring from another country.

These are the main costs of your event.

Why do we organize events?

- Strengthen the relationship with existing clients
- Branding & positioning
- Engaging clients with EF
- Adding extra value
- Networking -> Allowing clients share their experiences with others
- New leads & discussions
- Reason to reach out to senior level in a prospect / client company

Who are organizing & what is the target group?

- Most often organized in collaboration with Ashridge Executive Education
 - ➔ Consider the theme according both stakeholders' needs and target audience
- Target audience: Generally HR personnel with decision making capability → However the target group expansion may be considered to IT, procurement and business, as the aim of the event is also to build larger network inside the organization

Where?

- Easy access
- Internal versus external venues
- → Great to host it in our offices and schools where we have impressive meeting facilities
- Think alternative venue options → Non-traditional venues might attract even more attendees and be more memorable
- Preferred round tables/ Cabaret style ← Encourages to conversation

When?

- Check other events in your country or region that might affect to the number of your event attendees
- Be aware of public holidays and school holidays
- Most commonly corporate events are organized outside of July, August, and December
- Tuesday, Wednesday or Thursday are found to be the best week days for business events

Theme

- Interesting & relevant for guests
- Current topic → Trends
- Differentiation from competitors' events
- Benefits clients in terms of
 - Learning
 - Networking
 - Inspiring

In addition, consider carefully, how do all decisions we make support the objective to sell?

What is the topic that would make our clients interested as well as benefit them somehow?

What will make them drop their day-to-day work?

What we can implement within budget requirements?

Checklist

- Previous event reviewed (including feedback)
- Theme alternative(s) created
- Speakers availability checked
- Venues (Availability & booking)
- Budget
- Objectives defined
- Needs of the all stakeholders defined

Planning phase



Agenda

Build agenda around the theme and make sure they construct a continuous program following the objectives of the event.

The event program can consist of:

- **Key note speaker(s)**
- **Client speaker(s)**
- **Workshop**
- **Panel discussion**
- **Networking**

(Reserve some time for questions & discussions)

Think in creative ways and find the best alternatives to create your event program.

Make sure the speeches give an answer to the topic headlines of the invitation.

Events format:

Based on the experience of running events in EF Corporate Solutions, there are different models:

1. A half-day event, either morning (optional breakfast while people are arriving, coffee break and lunch as the last activity for people drifting away), or afternoon (starting with an optional lunch, then afternoon break and finish with drinks reception when people start drifting away but wish to continue their networking). In 2017 we had an event in Zurich, which was a bit longer than half a day (one more session after lunch) and it didn't work well, people started leaving after lunch as they couldn't commit for a longer stay.
2. A full day event starting in the morning, 2 coffee breaks and lunch included with an optional dinner/reception afterwards)
3. A one and a half days event. Our global/regional events are now 1.5 days, works well and on the second day we do a work shop style presentation.



GUEST SPEAKERS' IMPORTANCE – Think about good client cases and success stories. No one sells our services better than our clients. It is also a great way to engage with senior level executives in your client companies by offering them to speak at our event.

People come to EF & Ashridge seminars to know more about us. The event will influence the way attendees perceive us in the future. Make sure the topic is directly related to our business or an area in which EF or Ashridge are experts in. Pick the headline of the agenda that would intrigue our profiled guests and make sure you have a great keynote speaker delivering this session.

Break down goals for the event:

As the return on investment is hard to measure, in order to see the real value of the event, set objectives that are measurable

It is good to set short-term goals that can be monitored and measured easily as well as reminding us how beneficial events can be

Firstly the requested number of event attendees in total may be estimated

It is important to get prospective clients to attend in order to gain the highest benefit of the event.

How many people have to be invited by each sales person to ensure the attendance we aim for?

For instance, if we aim for 20 prospective clients attending, we would need to have 5 target clients attending the event from each sales person. And then each sales person would have a target of 3 new discussions booked as a follow up from the event and 2 new meetings.

You can monitor and evaluate these goals either in an excel file, or via salesforce.

Evaluation and tracking:

The best way to track the progress of the event planning and preparation is using a simple excel file where all tasks are assigned to your team members involved in the event.

The Appendix 9 includes instructions of events tracking in SalesForce, provided by Elisa Terraneo (Marketing Manager). Please follow the instructions in order to ensure successful events tracking and monitoring also at the organization level.



Define profile of your guests.

- ➔ If you are planning to invite C-level executives to the event, then please focus on a tough leadership topic. Do not try to include detailed sessions about our products. Sales conversations will be happening during breaks and conversations between guests.
- ➔ If you are planning to invite HR and Training managers, then it is best to have a very practical programme.

Know who your audience is, and what they are expecting. It is also good to talk and request feedback on the planned topic. Previous years' feedback can ease planning of the event help to understand the wishes of your clients.

Guest list example:

- 35 Existing clients
- 10 prospective clients
- 10 company promoters
- 10 atmosphere lifters

Plan guest list carefully: More important than the high number of attendees is to get the right beneficial people to attend in order to ensure the best return on investment (ROI).

A good guest list consists of different types of people; who create the event atmosphere and in its idealistic form includes a good mix of existing and target clients.

Key considerations:

- Who do you really want to invite?
- Who would benefit us?
- Who would be delighted at the invitation?
- Who would benefit the event content?

Start planning the guest list with the entire event team including all colleagues, sales and management

The better the guest list is constructed the less extra people need to be invited!

<u>Invitee</u>	<u>Position</u>	<u>Company</u>	<u>Client?</u>
XXXXXXXXXX	HR Manager	Company 1.	Existing client
XXXXXXXXXX	IT Manager	Company 1.	Existing client
XXXXXXXXXX	EMEA VP	Company 1.	Existing client
XXXXXXXXXX	HR Director	Company 2.	Existing client
XXXXXXXXXX	Sales Director	Company 2.	Existing client
XXXXXXXXXX	HR Consultant	Company 3.	Existing client
XXXXXXXXXX	Procurement manager	Company 3.	Existing client
XXXXXXXXXX	IT Director	Company 4.	Existing client
XXXXXXXXXX	Training manager	Company 5.	Existing client
XXXXXXXXXX	COO	Company 5.	Existing client
XXXXXXXXXX	Sales VP	Company 6.	Existing client
XXXXXXXXXX	ROB Manager	Company 7.	Existing client
XXXXXXXXXX	HR Consultant	Company 8.	Existing client
XXXXXXXXXX	HR Manager	Company 9.	Existing client
XXXXXXXXXX	HR Assistant	Company 9.	Existing client
XXXXXXXXXX	HR Director	Company 10.	Prospect
XXXXXXXXXX	IT Director	Company 10.	Prospect
XXXXXXXXXX	HR Consultant	Company 11.	Prospect
XXXXXXXXXX	Business Development	Company 11.	Prospect
XXXXXXXXXX	IT Manager	Company 12.	Prospect
XXXXXXXXXX	HR Manager	Company 12.	Prospect
XXXXXXXXXX	HR Manager	Company 13.	Prospect
XXXXXXXXXX	Sales Manager	Company 14.	Prospect

Invitees are more committed to attend when they understand the reason, why they are invited and how this event can benefit them, which causes lower cancellation/no show level. Help them to understand what they will gain personally/professionally after attending our event.



It is standard to send 'Save The Date', followed by the details and agenda invitation. These are used by KAMs to invite their clients.

Other ways to promote the event/invite people are but not limited to (be creative):

- Personal email invitation using Save The Date and Agenda invitations. Remember to highlight why they should attend our event.
- Mass invitation to your salesforce data base can be done by sending email blast via Marketo.
- LinkedIn post, if you have more than 3 months before the event, you can start by creating Thought Leadership Linked in posts that will be on the same topic as your event. Then you transition to event's posts, including event's promotion and speakers promotion (Zurich May 2019 event example)
- LinkedIn message
- Video invitation
- In a meeting face-to-face or during a phone conversation.

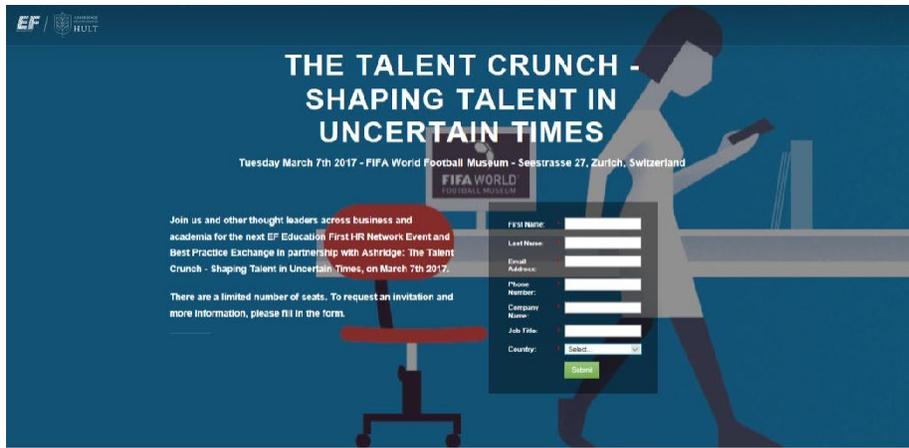
Find the best way to invite existing clients and potential clients in your country

Regardless of how attendees are invited, the invitation forms the table of content and creates the atmosphere!



Time	Content	Who
9.00	Welcome	Olivier Sempour - VP EF Corporate Solutions Americas
9.10	The Talent Crunch	Andy Bailey - CMO EF Corporate Solutions
9.30	Refreshment Break	
9.45	Leading in an uncertain world	Vicki Culpin Professor of Organisational Behaviour, Ashridge Executive Education
10.45	Refreshment Break	
11.00	Aligning L&D to Business impact	Frank Jaquez Sr. Director Global Talent Development, Fiat
12.00	Lunch	
13.30	Meet EF	
14.00	AccorHotels presentation	Paulo Mancio SVP Technical, Construction & Design
14.45	Refreshment Break	
15.00	Workshop	
15.45	Refreshment Break	
16.00	KPMG presentation	Marcelo de Lucca Partner, People, Performance and Culture, KPMG South America
16.45	Wrap-Up & Reflect	
17.30	Networking and drinks followed by dinner	

See Appendix 1. Helsinki Event 2019 Invitation



In order to register interest and make sure that information is stored in Salesforce, we create a registration landing page that is linked with a Salesforce campaign, example: <http://page.ef.com/Ashridge-EF-HR-NetworkEvent.html>

Please remember, when we use the registration landing page, we collect interest. It does not guarantee attendance. This is because we always check that only relevant people attend the event. This is why people don't receive an automatic confirmation email, and it still needs to have a personal touch with the contact.

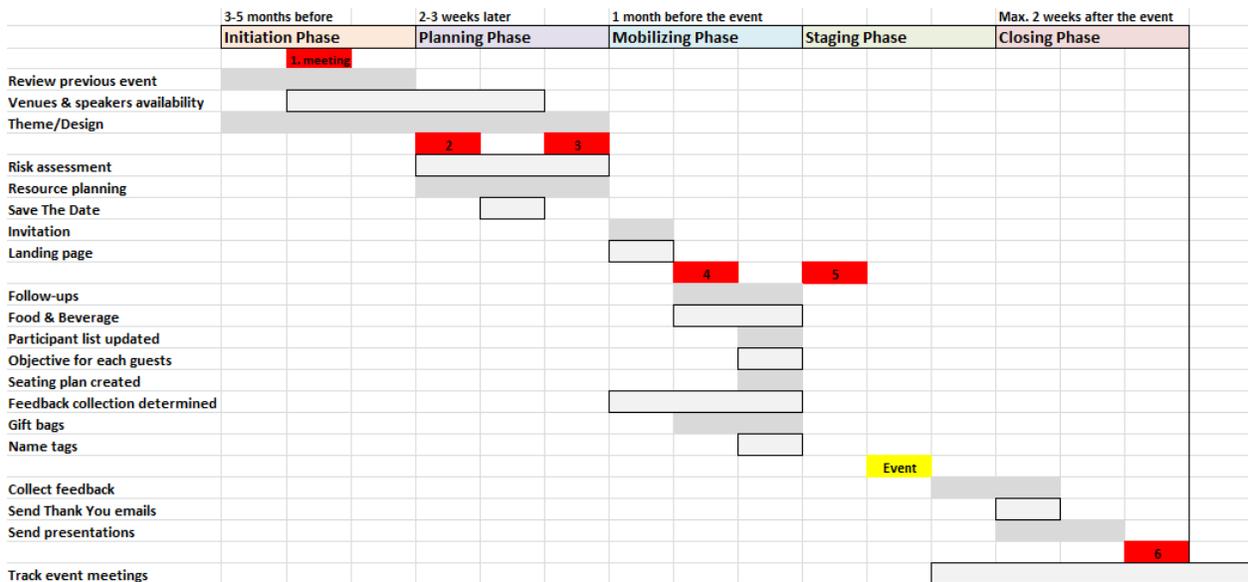
It is your choice to decide whether each KAM sends the confirmation to their clients, or the one who is managing the guest list sends the confirmation to all attendees. However, make sure this is done in a structured way and participants receive the confirmation within 1 week of their registration.

A calendar confirmation can be a good way to ensure the event is marked in their calendars and it has been found to be a useful tool to keep track of the guests who are coming! As they choose accept/tentative/decline



See an example of the confirmation email (Appendix 2.)

Schedule the event project and book a time for meetings. Meetings also work as good deadlines for tasks. (Gantt-chart example below)



- Meeting 3-5 months before**
 - 5W's framework (Draft of the topic and agenda, the venue, stakeholders; (organizers as well as target group), the date & objectives)

- Meeting 2-3 weeks later**

SAVE THE DATE

- Meeting 3 weeks later**

- Follow up

SEND INVITATIONS 3-4 months before the event

- Meeting 1 month before the event**

- Practicalities during the event

- Meeting 1 week before the event**

- Ensuring everything is ready, go through all practicalities, getting to know all guests

Check-up meeting 1 day before

THE EVENT

- Meeting 1-2 week after the event**

- Lessons learnt and summarize, What was successful, what changes we are going to make

Plan the meetings according the estimated needs. This mostly applies to larger-scale events

At this point, delegate tasks and responsibilities to your team clearly!

RISK ASSESSMENT

We all plan our events carefully but sometimes we do not think about any risks involved

What if the key-note speaker is sick or pulled into a very important board meeting?

What if a competitor shows up at our event?

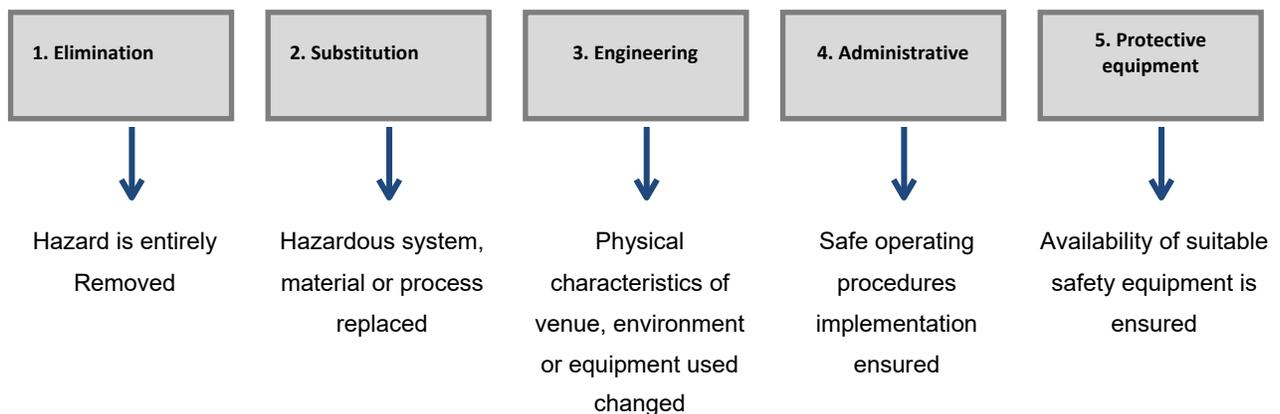
What if you receive too many last minute cancellations?

What if something happens at our event facilities and we are not able to execute the event there?

What if we are not able to attract enough participants for planned panel discussion (or other session)?

Encourage all people involved for open discussion in order to detect, manage and prepare for hazards efficiently!

You can use following figures to consider and manage risks:



When existing risks and their management are defined at an early stage, if any issues occur, you are better prepared, can ensure smoother management of risks and less stress will be involved

Check list

- Goals are set
- Guest list made
- Agenda confirmed
- Venues confirmed
- Costs estimated
- Save The Date designed & sent out
- Invitation designed & sent out
- Landing page is created
- Follow-ups scheduled/made
- Confirmation email is ready to go out
- Outlook calendar confirmation prepared
- Risk Assessment
- Schedule created
- Responsibilities & tasks shared
- ➔ One person managing the participant list

Mobilizing phase

Welcome booklet – before the event we share information about the event and we usually create a welcome booklet, mainly done for regional events or events that are minimum of 1 day (not half-a-day). We do it in indesign. For smaller events we simply use an agenda and a map if needed.

Welcome email that has all information that we usually provide and a welcome booklet. It is usually sent to all clients individually and CC their respective KAM. This way you have a control of all practicalities, and if they have any questions about the event, they will ask you.

Welcome bags We use EF fair bags and fill them with a relevant report (Talent Crunch was used for the recent events, as it was the headline of the event), EF CS brochure and Ashridge brochure (if relevant), EF notebook, EF souvenir (we have EF sticky pocket/wallet for the phone, phone chargers, water bottles etc.) or another EF branded gadget, and an EF pen. Plus always print the welcome pack (agenda or a booklet) and include it in the bag. However, if it is just an agenda, I put it as a single page on the table together with a notepad and a pen. Most of the times the venue provides the guests with a notepad and pens, if not we place our notebooks and pens on the table.



FIFA World Football Museum, Seestrasse 27, Zurich, Switzerland

Feedback -The closing phase remains critical to the evaluation of the feedback from guests and all organizers. Feedback can be collected in different ways and should be determined before the event. It is important because sometimes people put information such as ‘I want to know more about this and that’ and it is useful for KAMs to use this information for follow up meetings. It is also good for us to see how we did at the event and what we should improve.

Nowadays we generally collect feedback via following website:

<https://www.getfeedback.com/r/IXL59dmB/q/1>

Please see Appendix 8, standard questionnaire

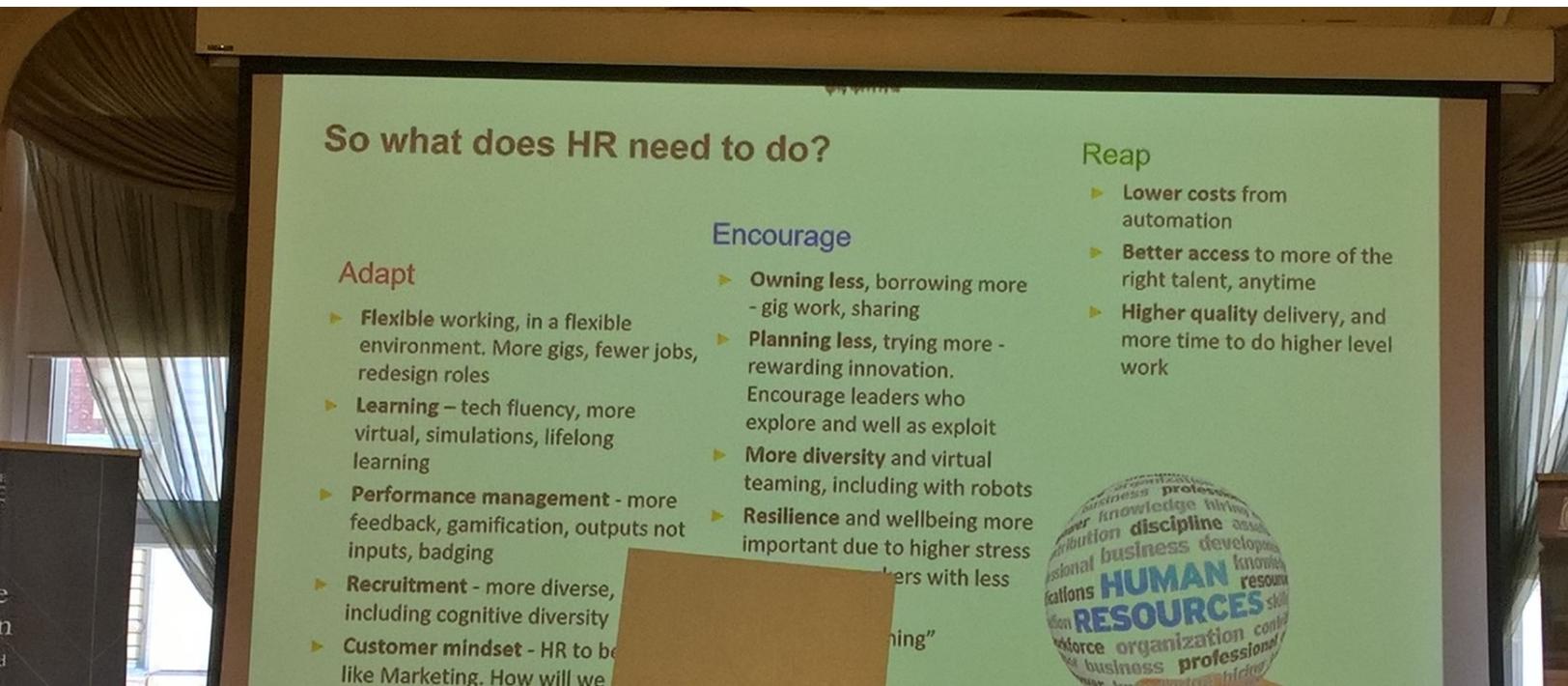
Postal questionnaire survey is a commonly used method, and because of their tendency to generate low response rates, the following steps are generally suggested:

Covering letter	Short questionnaires	Clear instructions	Open questions as little as possible
Monetary incentives	Attractive layout	Follow-up individuals	Begin questions that are likely to be of interest to the respondent

In some events we also give out release forms. This is because we used photographers and we needed the clients’ consent that we could use their pictures. We also wanted to share contacts of everyone from the event in a file; hence we had to give this release form for everyone to sign. It was optional obviously, but everyone signed it. I want to point out about photos and videos. It is a bit costly and we rarely do it. It is, obviously up to you if you want to spend money on filming and photography. But please check before if you need to have a release forms or if it is acceptable in your country.

Continuous Programme- It is recommended to set the deadline for all presentations one week before the event, and one person goes through all presentations and makes sure presentations don't over-lap with each other and together they form a continuous entirety that clearly relates to the audience.

At this point there is still time for small changes



So what does HR need to do?

Adapt

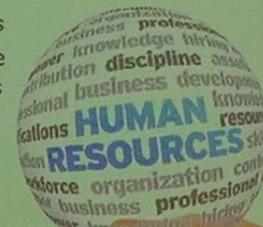
- ▶ **Flexible working**, in a flexible environment. More gigs, fewer jobs, redesign roles
- ▶ **Learning** – tech fluency, more virtual, simulations, lifelong learning
- ▶ **Performance management** - more feedback, gamification, outputs not inputs, badging
- ▶ **Recruitment** - more diverse, including cognitive diversity
- ▶ **Customer mindset** - HR to be like Marketing. How will we

Encourage

- ▶ **Owning less**, borrowing more - gig work, sharing
- ▶ **Planning less**, trying more - rewarding innovation. Encourage leaders who explore and well as exploit
- ▶ **More diversity** and virtual teaming, including with robots
- ▶ **Resilience** and wellbeing more important due to higher stress

Reap

- ▶ **Lower costs** from automation
- ▶ **Better access** to more of the right talent, anytime
- ▶ **Higher quality delivery**, and more time to do higher level work





Pre-meeting – the latest a day before the event

All people included in organizing the event (EF & Ashridge) should gather together with the aim of going over practicalities (what time we are starting, who is seated where etc.) delegating all tasks and ensuring each team member is fully aware of their responsibilities. In these briefings the event manager should be absolutely certain that all responsibilities are delegated to the point of who comes to the stage if the speaker is unable to run the PowerPoint presentation, who ensures the technology is working and who is the contact person in case of any issues on the day. If the briefing is held at the event venue, the team is able to familiarize themselves with from where they can find certain things to how people can move within the facilities.

On the event day there might be unusual security or traffic arrangements that might complicate the arrival or entry into the building. All of these should be discussed beforehand with all the event attendees in order avoid stress and confusion on the day of the event. It is easier to solve problems and clarify event-related matters prior to the event rather than during it. Almost without exception during such briefings someone proposes a potential improvement or change.

We also look through the list of participants, highlighting main points and agreeing upon the strategy for each client. Presented on the next page →



Example

For example: One client is not sure about the scale of the project and another client has a large project with you, we make sure we introduce them during the event; or if someone has a particular concern about our product, we know who to put them in touch with.

Short account history: Have been working with Company X for 5 years. Annually buying around 200 online courses, but now have had discussion of 20 students EF Professional pilot. A competitor organizing in-company training for 70 employees annually.

Goals/expectation: Set up a close relation and get the pilot group started. Kick-out the competitor.

Current Spending: 110 K

Primary objective: Goal is to set up a meeting right after the event and push for a pilot group.

This action helps to guide your and the whole team's actions towards better results and can help in creating the seating plan.

Check list

- Outlook calendar confirmation/Welcome email
 - Instructions of how to get there
- Common thread/continuous programme
- Gift bags
- Food & Beverage
- Way to collect feedback determined
- Feedback questions
- Name tags
- The participant list updated
- Objectives defined for each guest
- Seating plan created
- The host decided
- Discussed about practicalities
- Inform the total number of participants (F&B and facilities)

Staging Phase

For the reception and registration it is advisable to reserve a person or people who know as much as possible about the event guests as well as the facilities and the event programme. People highly value the fact that they are recognized or known. It is an integral part of the event to make guests feel comfortable and welcomed from the first point of contact.

Make all the guests feel welcome as well as special and take care of the event participants equally. Decrease the uncertainty of more reserved participants by inviting them to join, introduce guests to each other and lead them to food, drinks and the programme.

Evaluate performance against plans and ensure performance success. Right after the event when everything is still fresh in memory, an event report including an evaluation on each separate part should be produced.

Check list

Morning:

- Technology (Mics, screen...)
- Food & Beverage
- Someone welcoming attendees

The event:

- Follow run sheet and scheduling
- Evaluate event activities
- Collect feedback
- Ensure guests are enjoying and networking efficiently

Closing phase

As we organize events in collaboration with Ashridge Executive Education, it is important to summarize events together.

We analyze and collect information from each client that different people collected during the event and use this whilst we look through feedback forms.

Summarize the feedback and consider changes for the next year based on customer feedback and your own experiences and analysis.

Go through points listed below:

- What was successful?
- Did everything go as planned?
- Were we prepared well enough to risks and changes?
- How did we manage unexpected situations?
- What could have been done better?
- What should we improve for the next event?
- Did we reserve enough time for preparations as well as each speaker/programme?
- Did we achieve our objectives?
- Did we receive enough feedback?

The data for analysis should be easily accessible as well as tracked and calculated throughout the event life cycle. The information of the average meeting cost for each guest, cost trends from year to year, negotiated savings, annual spending with a specific hotel and whether it meets the original budget, are among the analytical questions to be evaluated.

Events organization is a continuous learning process, and for further success, reviewing the event process provides areas for greater success and improvements for the next event.

This manual was produced with the help of multiple professionals who are to be thanked.

A special gratitude for:

Tatiana Kulikova –Web Publishing and Events Manager

Anja Salo – Regional Vice President

Anna Nicholson –Marketing Vice President

Roxana Plötz –Program Manager

Laura Häkkinen –General Manager

Erik Lindberg –General Manager

Ingrid Nielsen –General Manager

Elisa Terraneo –Marketing Manager

I hope this manual helps throughout an event project and assists in achieving better results.

Sincerely,

Ida Lehdonpolku

Appendix 1. Helsinki Event 2019 Invitation



21 March 2019 • 8:30-13:45 (including lunch)
Hotel Kämp, Peiliselä, Helsinki

Agenda

8:30-9:00	Breakfast and networking	
9:00-9:20	Welcoming words from EF & Ashridge Laura Häkkinen, General Manager EF and Naysan Firoozmand, Head of Global Executive Coaching & Regional Vice President Ashridge	
9:20-10:50	The 4th Industrial revolution: opportunities and threats Dr. Paolo Gallo, Executive Coach, best-selling author & writer, keynote speaker & storyteller, Associate Professor of Organizational Behavior, Senior Advisor.	
10:50-11:05	Networking break	
11:05-11:35	How Machine Learning could revolutionise L&D Ben Hope, Vice President at EF Corporate Solutions	
11:35-12:05	Exploding career paths, CGI's new modular approach for competence-based careers Valtteri Lämsimies, Organization & Talent Strategist/ Director, Organizational Development & Learning at CGI	
12:05-12:45	Transforming learning at Nordea: Efficiently building the competence needed for today and tomorrow Stevan Smith, Chief Learning Officer, Learning at Nordea	
12:45-13:45	Networking lunch	

Appendix 2. Confirmation email

Dear ,

Thank you for your registration to “The Changing Workplace: Preparing your organization for digital disruption” seminar!

We are delighted to welcome you to half day of interactive seminars and workshops, where we will be discussing the latest research and strategies behind truly impactful learning for business.

Location: Hotel Kämp, Peilisal, Helsinki

Date: 21st March 2019

Time: 8:30am - 1:45pm

In case you have any dietary restrictions kindly let us know by replying to this email.

Kind regards,

Your EF Team

Appendix 3 Calendar invitation

Hello,

Thank you for your registration to EF & Ashridge seminar on Thursday 21 March 2019 at 8:30-13:45.

Please find the seminar agenda attached.

How to find the seminar venue:

The venue is Hotel Kämp Peilisali, 2nd floor. Use the main entrance of the hotel on Kluuvikatu 2 and take a lift to the second floor.

Parking facilities:

If you are arriving to hotel Kämp by car, we recommend you to park in P-Kluuvi. The parking space can be accessed either from Fabianinkatu 27 or Puutarhakatu 1.

We look forward to seeing you there!

Best regards,

Appendix 4. Reminder email

Hello,

You are very warmly welcome to EF & Ashridge seminar together with other 80 participants on this Thursday 21 March 2019 at 8:30-13:45

Please find once more the seminar agenda attached.

How to find the seminar venue:

The venue is Hotel Kämp Peilisali, 2nd floor. Use the main entrance of the hotel on Kluuvikatu 2 and take a lift to the second floor.

Parking facilities:

If you are arriving to hotel Kämp by car, we recommend you to park in P-Kluuvi. The parking space can be accessed either from Fabianinkatu 27 or Puutarhakatu 1.

It's going to be an exciting and inspiring day. Great to see you soon!

Best regards,

Appendix 5. Thank you email

Thank you for participating in the EF-Ashridge seminar last Thursday. We truly hope that you enjoyed the event as much as we did.

To make sure our next event will be even better, we would now like to ask for your feedback. Please take a couple minutes to fill in a survey [here](#) and as a thank you, we will self-deliver or send to you Paolo Gallo's book "The Compass and the Radar". Please feel free to suggest any interesting topics for the future and tell us how you liked the venue, presentations, lunch, networking, etc.

Here are the contact details of our guest speakers. Feel free to connect with and follow them:

- Ashridge Adjunct Professor, Dr. Paolo Gallo, <https://www.linkedin.com/in/paolo-gallo-b996874/> Twitter @pgallobussola1
- EF Corporate Solutions: Ben Hope, Vice President, <https://www.linkedin.com/in/benmhope/> Twitter @benmhope
- CGI: Valtteri Länsimies, Director, Organizational Development & Learning, <https://www.linkedin.com/in/valtterilansimies/> Twitter @topivaltteri
- Nordea: Steven Smith, Chief Learning Officer <https://www.linkedin.com/in/steven-smith-426524/>
- Ashridge Executive Education: Naysan Firoozmand, Regional Vice President, <https://www.linkedin.com/in/naysan/> Twitter @naysanf

If you are interested in receiving the presentations please be in contact with me.

We look forward to continuing the dialogue with you!

Kind regards,

Appendix 6. Thank you email 2 including presentations

Dear all,

On behalf of our EF Corporate Solutions team, I would like to thank you once again for attending our EF & Ashridge Seminar, **The Changing Workplace: Preparing your organization for digital disruption**. It was such a pleasure to meet all of you and welcome you to our event.

As promised, we wanted to share all relevant material from the event. Please find links below to all presentations.

Please note: These presentations are only for viewing and cannot be shared or used.

Speaker presentations:

[Welcoming words from EF & Ashridge](#)

Laura Häkkinen, General Manager EF and Naysan Firoozmand, Head of Global Executive Coaching & Regional Vice President Ashridge

[The 4th industrial revolution: opportunities and threats](#)

Dr. Paolo Gallo, Executive Coach, best-selling author & writer, keynote speaker & storyteller, Associate Professor of Organizational Behavior, Senior Advisor.

[How Machine Learning could revolutionize L&D](#)

Ben Hope, Vice President at EF Corporate Solutions

[Exploding career paths, CGI's new modular approach for competence-based careers](#)

Valtteri Länsimies, Organization & Talent Strategist/ Director, Organizational Development & Learning at CGI

[Transforming learning at Nordea: Efficiently building the competence needed for today and tomorrow](#)

Steven Smith, Chief Learning Officer, Learning at Nordea

Of course, we'd be delighted to follow up and help with answers to any questions.

And If you haven't given us feedback yet, please take a couple minutes to fill in a survey [here](#). As a thank you for your feedback, we will self-deliver or send to you Paolo Gallo's book "The Compass and the Radar". 😊😊

Please also stay tuned for information regarding future events and webinars. If you would be interested in sharing your story at a future event, please let us know.

Sunny Greetings,

Appendix 7. Name plates

**Matti Meikäläinen
Company**



**Matti Meikäläinen
Company**

**Matti Meikäläinen
Company**



**Matti Meikäläinen
Company**



Your name: _____

Company: _____

Communication and Culture // EF Leadership Seminar Series
MAY 5th, 2016 BOSTON, USA EF NORTH AMERICAN HEADQUARTERS

EF Seminar questionnaire

Thank you for attending our EF Seminar on Communication and Culture.
We ask that you please complete this questionnaire and return it to an EF Staff member.

Seminar Topic & Content

What were your objectives for the event?

Do you think those objectives were met? (1= not at all 5= exceeded expectations)

1 2 3 4 5

Was the content interesting?

1 2 3 4 5

Was the level of detail appropriate?

1 2 3 4 5

What would you like to hear more/less about?

Sessions (1= not relevant at all 5 = extremely relevant)

Do you speak business? Challenges of cross-border communication - Ben Hope, EF Customer Success

1 2 3 4 5

Workshop: Addressing virtual conflict and developing effective global teams - Anne Taite Vogeleer and Peggy Wegler, EF Academics

1 2 3 4 5

Lunch break activity: Tour of Executive Institute

1 2 3 4 5 Not Applicable

Lunch break activity: Demonstration of English Live

1 2 3 4 5 Not Applicable

KEYNOTE SPEAKER: Building high performing global teams - Rahul Varma, Chief Learning Officer, Accenture

1 2 3 4 5

WORKSHOP: Working and communicating across cultures - Jean Vanhoegaerden, Ashridge Executive Education Faculty

1 2 3 4 5

Comments

Location & Setting (1= not at all 5= extremely)

The information received before the seminar was appropriate:

1 2 3 4 5

The length of the seminar was appropriate:

1 2 3 4 5

The hotel was appropriate:

1 2 3 4 5 Not Applicable

Comments

General (1= poor 5 = excellent)

How do you feel the overall seminar was organized?

1 2 3 4 5

Please rate your level of satisfaction in general:

1 2 3 4 5

Please provide any additional comments and / or suggestions for future events:

What other training topics would you be interested to hear more about?

Would you like to arrange a meeting with an EF representative to discuss further how our solutions could be used in your company?

Yes No

Would you agree to us sharing your contact details (name, company, email) with the participants of this seminar?

Yes No

Thank you very much for your time!

Appendix 9. Tracking events successfully-marketing

Tracking Events Successfully in Salesforce & Marketo

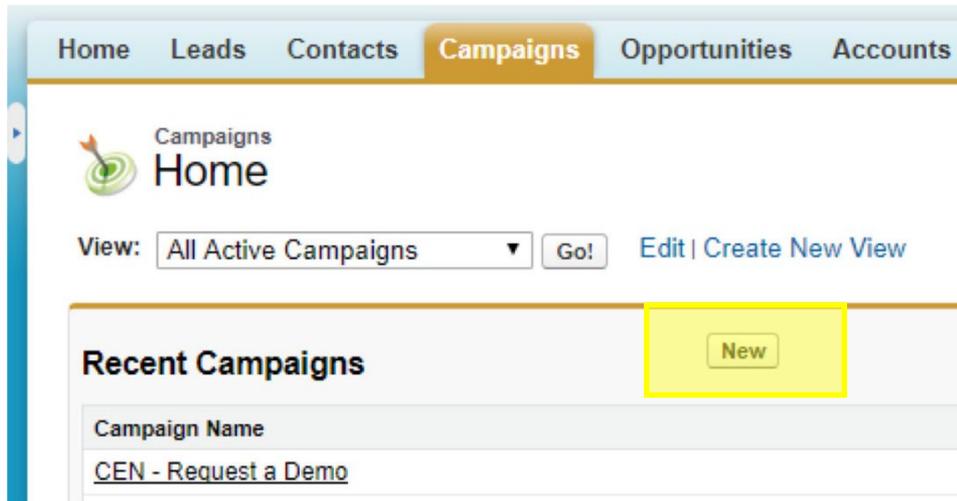
A Guide for Marketing
Managers

Your Event Checklist

- 1- Create a Salesforce Campaign
- 2- Prepare the list of attendees
- 3- Import the list into Marketo
- 4- Synchronize the list with Salesforce
- 5- Create Last Interesting Moment
- 6- Follow up with KAMs and track ROI
- 7- Send Follow up emails

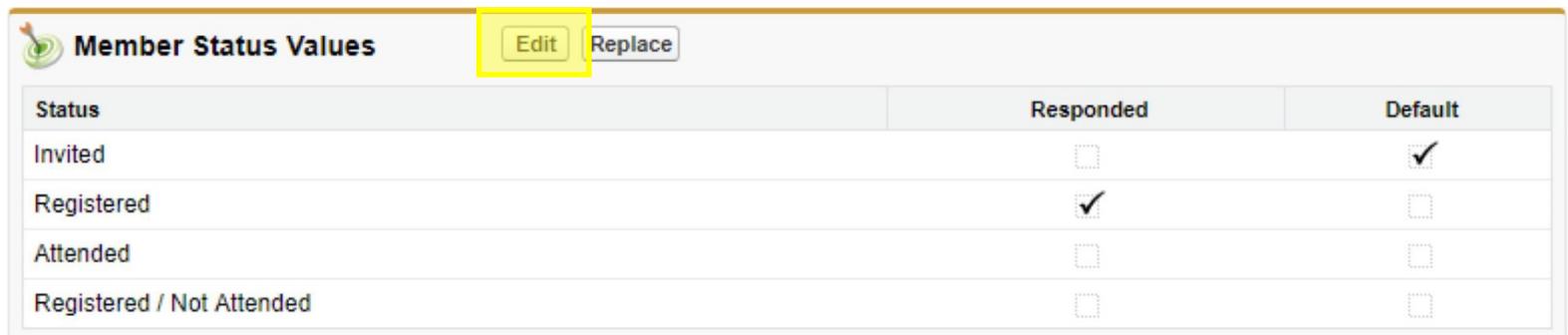
1 - Go to Salesforce and Create a Campaign.

- Choose type:Event
- Namingconvention: Country_EventName_FY”
e.g. IT_ HRCBarcamp_Jan_FY18. Save it



The screenshot shows the Salesforce interface for the Campaigns Home page. At the top, there is a navigation bar with tabs for Home, Leads, Contacts, Campaigns (selected), Opportunities, and Accounts. Below the navigation bar, the page title is "Campaigns Home" with a target icon. There is a "View:" dropdown menu set to "All Active Campaigns" and a "Go!" button. To the right of the dropdown are links for "Edit" and "Create New View". Below this is a "Recent Campaigns" section with a yellow "New" button. Underneath, there is a table with one row: "Campaign Name" and "CEN - Request a Demo".

- Go to > Advance Setup and add the following Member Status:



The screenshot shows the Salesforce "Member Status Values" setup page. At the top, there is a title "Member Status Values" and two buttons: "Edit" (highlighted in yellow) and "Replace". Below the title is a table with the following data:

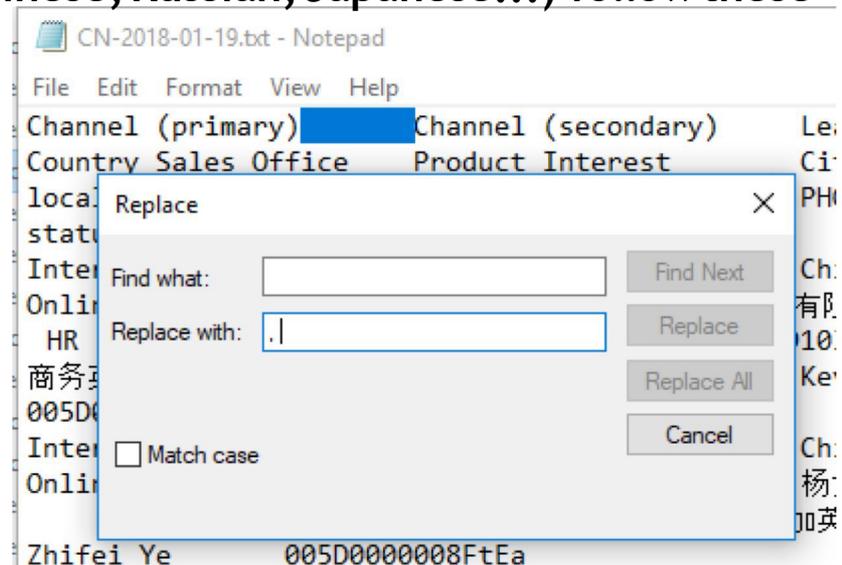
Status	Responded	Default
Invited	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Registered	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Attended	<input type="checkbox"/>	<input type="checkbox"/>
Registered / Not Attended	<input type="checkbox"/>	<input type="checkbox"/>

2 - Prepare the list of attendees

- Clean&updatepeopleinyourexcellist(usethe[importtemplate](#))
- Mandatory fields are: Email address, First/Last name, Company name, Account Country, Lead Source, Channel, Channel Secondary, Status and Product Interest.
- Nice to have: Role& Industryonlyif the values match SF
- Lists of people without email addresses can be uploaded through BD Team. [Use this template.](#)
- Save as CSV.

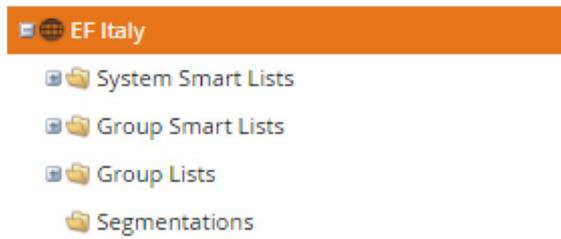
If your list contains special characters (Chinese, Russian, Japanese...) follow these steps:

- Save your Excel file as .txt
- Open the file in Text, find and replace all spaces with «,»
- Save as type «All Files» and replace .txt with .csv

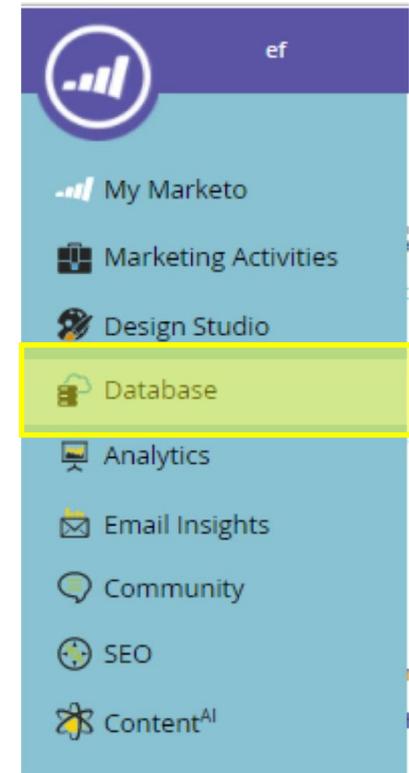
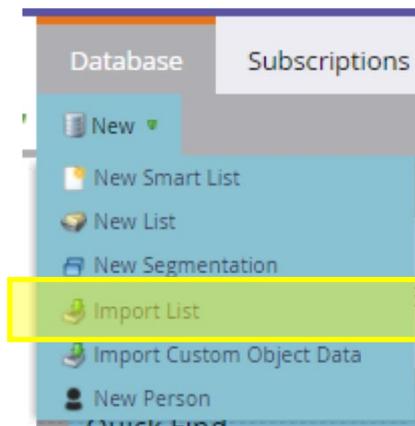


3 - Import the List in Marketo

- Go to Database (Lead Database)
- Click on your partition, when you see it orange, it means that you are going to import the list in that space.



- Select New>ImportList.You will be able to import your CSVfile.



- Click on Browse and select your list from your files

Import List

Step 1: Select File Step 2: Import Preview Step 3: Import Options

File: * **BROWSE...**

File Format: Auto Detect

Trusted Source: Trusted

List Import Mode: Default (Fast Import)

- De-Duplicate people
- Log **change data value** and **add to list** activities
- Update person fields

CANCEL BACK NEXT

- Next step is crucial!
You will match info in your file with Marketo fields. Don't skip IGNORE, make sure that all IGNORE has a matching value (e.g. First Name = First Name; Company Name = Company Name...)

Import List

Step 1: Select File Step 2: Import Preview Step 3: Import Options

List Column	Marketo Field	Sample Value	Notes
Product Interest	---IGNORE---	Online	
Company local	---IGNORE---	埃森哲	
status	---IGNORE---	MQL	
Owner	---IGNORE---	Biaobiao Zhu	
OwnerID	---IGNORE---	005D0000008G1Na	

⚠ 5 fields ignored. [Learn More](#)

CANCEL BACK NEXT

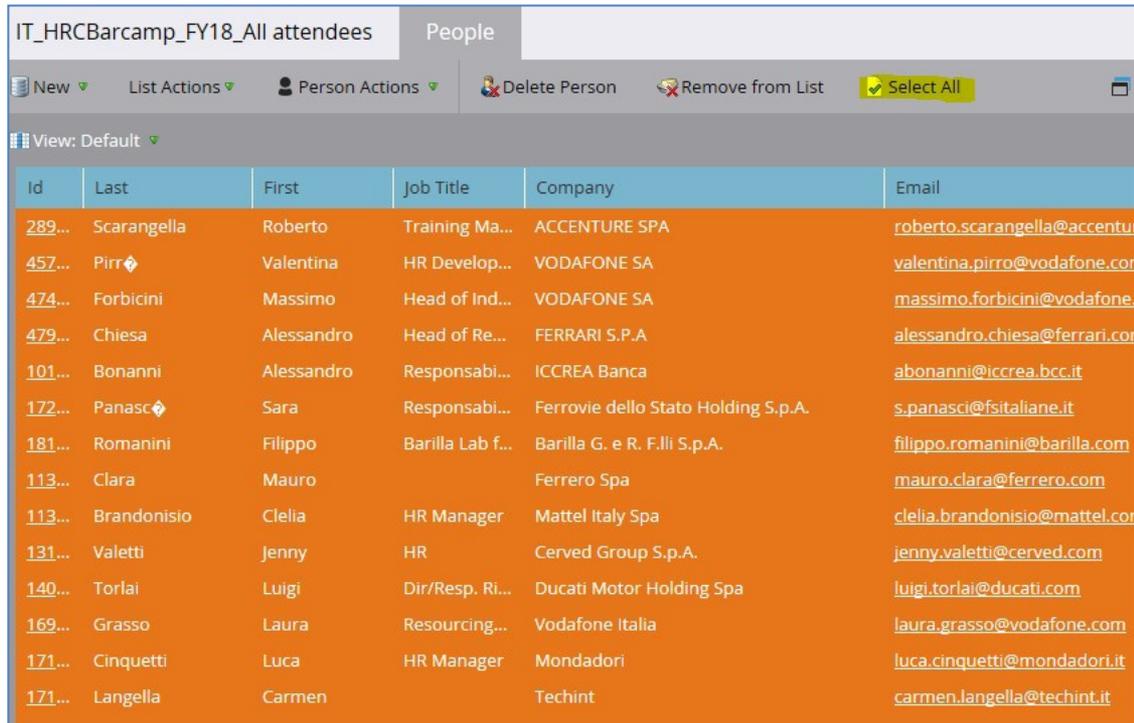
- Add the listname and select Acquisition Program = None

The screenshot shows the 'Import List' interface with a progress bar at the top indicating three steps: Step 1: Select File, Step 2: Import Preview, and Step 3: Import Options. The 'List Name' field is highlighted in yellow and contains a red asterisk. Below it is the 'Send Alert To' field. An 'Advanced' section is expanded, showing 'Revenue Stage' set to 'None' and 'Acquisition Program' set to 'Select a Program' with a red asterisk. A note below the 'Acquisition Program' field reads 'Note: Acquisition program for new leads only'. At the bottom, there are three buttons: 'CANCEL', 'BACK', and 'IMPORT'.

- Click Import and your list will be uploaded to Marketo. Check the final # of people successfully imported. If someone is missing, you will be able to investigate why.

4- Synchronize this list with Salesforce.

- Select all people clicking «Select All»



The screenshot shows a Salesforce interface with a list of attendees. The list is highlighted in orange, and the 'Select All' button is active. The list contains 15 rows of data, each with columns for Id, Last, First, Job Title, Company, and Email.

Id	Last	First	Job Title	Company	Email
289...	Scarangella	Roberto	Training Ma...	ACCENTURE SPA	roberto.scarangella@accentu...
457...	Pirro	Valentina	HR Develop...	VODAFONE SA	valentina.pirro@vodafone.co...
474...	Forbicini	Massimo	Head of Ind...	VODAFONE SA	massimo.forbicini@vodafone...
479...	Chiesa	Alessandro	Head of Re...	FERRARI S.P.A	alessandro.chiesa@ferrari.co...
101...	Bonanni	Alessandro	Responsabi...	ICCREA Banca	abonanni@iccrea.bcc.it
172...	Panasc	Sara	Responsabi...	Ferrovie dello Stato Holding S.p.A.	s.panasci@fsitaliane.it
181...	Romanini	Filippo	Barilla Lab f...	Barilla G. e R. F.lli S.p.A.	filippo.romanini@barilla.com
113...	Clara	Mauro		Ferrero Spa	mauro.clara@ferrero.com
113...	Brandonisio	Clelia	HR Manager	Mattel Italy Spa	clelia.brandonisio@mattel.co...
131...	Valetti	Jenny	HR	Cerved Group S.p.A.	jenny.valetti@cerved.com
140...	Torlai	Luigi	Dir/Resp. Ri...	Ducati Motor Holding Spa	luigi.torlai@ducati.com
169...	Grasso	Laura	Resourcing...	Vodafone Italia	laura.grasso@vodafone.com
171...	Cinquetti	Luca	HR Manager	Mondadori	luca.cinquetti@mondadori.it
171...	Langella	Carmen		Techint	carmen.langella@techint.it

- Go to Person Actions > Add to SFDC Campaign

The screenshot shows the Salesforce People interface for a group named 'IT_HRCBarcamp_FY18_All attendees'. The 'Person Actions' menu is open, and the 'Add to SFDC Campaign...' option is highlighted. The background shows a list of people with columns for Id, Last, First Name, Last Name, Company, and Email.

Id	Last	Company	Email
289...	Scarangella	ACCENTURE SPA	roberto.scarangella@accentu...
457...	Pirro	VODAFONE SA	valentina.pirro@vodafone.co...
474...	Forbicini	VODAFONE SA	massimo.forbicini@vodafone...
479...	Chiesa	Ferrari	alessandro.chiesa@ferrari.co...
101...	Bonanni	ICCREA	abonanni@iccrea.bcc.it
172...	Panasci	FS ITALIANE	s.panasci@fsitaliane.it
181...	Romanini	BARILLA LAB	filippo.romanini@barilla.com
113...	Clara	FERRERO	mauro.clara@ferrero.com
113...	Brandonisio	MATTEL	clelia.brandonisio@mattel.co...
131...	Valetti	CERVED	jenny.valetti@cerved.com
140...	Torlai	DUCATI	luigi.torlai@ducati.com
169...	Grasso	VODAFONE	laura.grasso@vodafone.com
171...	Cinquetti	MONDADORI	luca.cinquetti@mondadori.it
171...	Langella	TECHINT	carmen.langella@techint.it

- Select your Campaign and use the default status for campaign members

(Invited—Registered—Attended—Registered/Not Attended)

This will affect 99 people

 Add to SFDC Campaign

Campaign:

Status:

 Add Choice

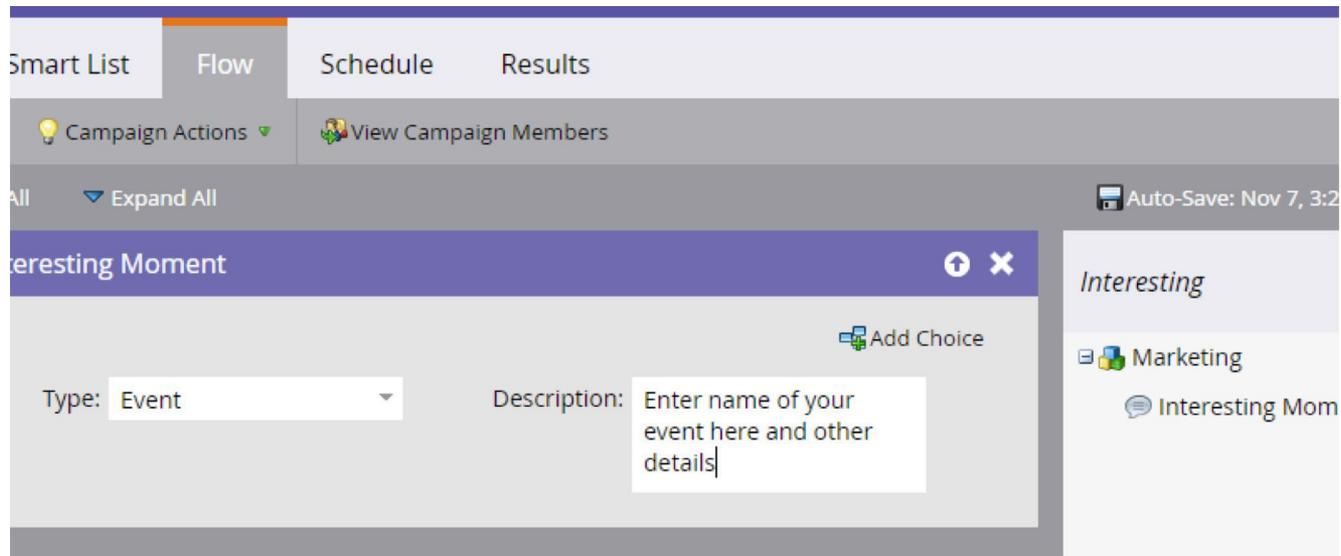
- Go to your Salesforce campaign to verify all leads have been imported.
- If a contact/lead already exists in SF with the same email address it won't be duplicated.
- If a contact/lead already exists in SF, Lead Source, channels and status information won't be overwritten. Only the New Campaign and Last Interesting Moment will be added.

5 - Create «Last Interesting Moment»

- You should create an Interesting Moment in Marketo for all the leads and contacts who attended an Offline Event.
- Create a Smart campaign in Marketo.

Smart list: Member of SFDC Campaign > Member Status = Attended

Flow:



The screenshot shows the Marketo interface for a Smart List. The 'Flow' tab is selected, and the 'Add Choice' button is visible. The 'Type' dropdown is set to 'Event', and the 'Description' field contains the text 'Enter name of your event here and other details'. The 'Interesting Moment' dialog box is open, showing the 'Add Choice' button and the 'Type' dropdown.

- Run once.

6 - Follow up with Account Managers and track ROI.

- Once you created the campaign in SF, you can share the link with your KAMs. They will find all names there. In case they don't have the required permission to see the campaign, you can send the Excel file and ask them to update SF only.

What KAMs need to update:

- Log call/Meetings both for Leads and Contacts
- In case of a Lead, after a discovery call/meeting, if it's a good one, KAMs need to Convert it.

If KAMs follow up in SF, you will be able to see Opportunities influenced by marketing in your dashboard and run specific reports to track ROI. Marketing managers should ask for a general update on the follow-up process in staff meetings.

Follow up Tips for Marketing & Sales:

- Marketing can send a follow up email to all attendees to thank them and send something like the presentation shown in case of a speech or one of EF's Thought Leadership reports, depending on the topic of the event.
- If it was an event organized by EF, marketing can also send a survey to ask for feedback - use this for a very small event, where attendees are more likely to answer.
- KAMs can follow up on the email for with the next action (i.e. bring printed reports, dive deeper into the topic etc.) to meet the contacts.