

INSIDE
LIVE
EVENTS

YOUR PLAYBOOK FOR
MASTERING THE EXPERIENCE

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LIVE
EVENTS

Bob Priest-Heck &
Carrie Freeman Parsons



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First Edition

EVERY HUMAN ENDEAVOR comes wrapped in a paradox—the minute we commit to taking one course of action, we must also decide not to do many others. When we agreed to create a book about *how* live events are conceived and executed, we had to step away from the desire to write about *why* live events matter. That could fill several books, but the need for a comprehensive “how to” seemed more urgent. And frankly, people inside the event industry understand why events matter, even if we don’t talk about it very often.

Maybe it’s obvious, but for the rest of the world, it needs to be said: Live events are about bringing people together in a way that engenders commerce, learning, progress, innovation, and goodwill. History shows that live gatherings are essential to our humanity. Throughout history, people around the world have participated in ritual gatherings to mark marriages, funerals, military victories, and sacramental rites. The ancient Greek *agoras* supported lively markets but also served as places to discuss current events and ponder big issues. Professional societies flourished as the precursors to our trade associations, playing a huge role in curating, incubating, and broadcasting new ideas. People have always found ways to be together when something mattered. Why? Because sharing the experience makes it real.

We dedicate this book to all who have historically advanced this collective spirit. Merchants who displayed their wares in tents along the ancient trade routes. Nineteenth-century inventors who proposed breakthrough ideas to an incredulous exposition audience. Small entrepreneurs who bet everything on making it big at a national trade show.

We dedicate this book to the industry professionals who give their all, day after day, until the impossible seems routine.

We dedicate this book to the customers who have trusted us with their treasure—their brands, their loyal customers, their sustainable success.

And we dedicate this book to those who may not yet realize that this is the legacy they will build on, grow, and push into unimagined directions. Students, young professionals, and anyone who is dissatisfied with work that is predictable, isolating, and uninspired—we need you. The world needs you.

We have started this book in the hope that you will finish it.

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Introduction

We do events for a living. Freeman is one of the world's leading event companies, so we've seen firsthand the power of bringing people together to explore innovative ideas, grow businesses, advance education, improve the art and science of healing, and create memories that last forever. Events enable people to come together in synergistic ways. Our goal is to help make every gathering that connects people more meaningful.

WHO WE ARE

Bob Priest-Heck

I can't imagine a more fulfilling career than the one I've enjoyed in the events industry. I started out in hospitality at Hyatt, where I learned valuable lessons about human behavior and the need for empathetic leadership. That job brought me from the Midwest to California when the tech industry was emerging. I was brought in by Jonathan Seybold, who was turning hobby publishing into a technology–media powerhouse. We worked out of an old Malibu mansion next to Johnny Carson's home. That led to an opportunity to work with Dan Lynch to create environments and educate IT professionals on “network interoperability.”

This initiated the adoption of TCP/IP protocols at events like Interop—basically creating the commercial internet infrastructure.

The debate about the future of the internet attracted people like Steve Jobs and Bill Gates, and our events gave them a forum to exchange and promote ideas. Eventually, I moved to Japan to spend several years building teams and disruptive technology events around the globe, creating brand experiences for emerging products and ascendant companies, leading to the launch of JavaOne in 1996. As breakthroughs in digital technology progressed, I consulted for different companies, envisioning a new breed of event agency.

When my path crossed with Freeman's, they invited me to join them and invested in making their vision a reality. I became the first non-family member to serve as Freeman's CEO, and I continue to serve on the board of directors. Today, my hope is that this book will help more people embrace and amplify the power of events to create positive change.

Carrie Freeman Parsons

In 1927, my grandfather Donald (Buck) Freeman decided to leverage his passion for organizing fraternity parties by founding an event-decorating business. Before long, the whole family was helping out with the new company. As a young boy, my father, Don Freeman Jr., started helping his sister pull staples out of old, wooden display tables. He later became company president in 1972 and was named chairman and CEO in 1977. Growing up, our family life was intertwined with the company, and I naturally saw the employees as extended family. I worked at the company in the summers and upon graduation in 1985 joined full time and fell in love with the possibilities. I realized that my family had created a culture based on shared values, mutual trust, and a keen sense of purpose, capable of building a vibrant, self-contained world where nothing had existed the day before and that would disappear the day after. We were part of an industry that touched every other sector of business, health care,

sports, entertainment, education, and even social gatherings. By bringing people together, we were helping advance progress and prosperity. This reinforced my conviction that we can all “do well by doing good.”

I’ve worked in a variety of offices and positions at Freeman, and I’ve been inspired by so many people in this industry, especially my father. In 2019, he became chair emeritus and named me chair. I’m proud and grateful to continue the family tradition. Every day, the people of Freeman strive to serve the community and harness our power to transform the world. I encourage anyone interested in creating meaningful change to join us.

WHY EVENTS MATTER

When people come together to share ideas, they can forever change the course of progress. The innovations, discoveries, and progressive ideas championed by visionaries and inventors over the centuries might never have flourished without the attention, influence, and collaboration of others. The meetings, trade shows, conferences, and exhibitions described in this book are hosted, designed, and produced by event creators working to connect people by creating a dedicated space for them to discover new synergies. Being part of this industry can feel exhausting, exhilarating, and deeply gratifying. It’s hard work for event creators (our clients) and for us (the agencies and contractors responsible for bringing their vision to life). Yet, as challenging and overwhelming as the work sometimes seems, the results can be memorable and lasting. That’s why we believe this work matters.

People in our industry cherish the thrill of being part of an event, whether it’s a corporate extravaganza launching breakthrough technology or an association of high school teachers seeking new ways to reach kids. We’re privileged to be part of something bigger than ourselves and to experience a unique sense of community, purpose, and shared passion. Events are experienced live, whether in person or streaming, so anything

can happen. We can plan every detail and prepare for every contingency, but then we have to let go, hope for the best, and run interference as needed. While there's no guarantee that everything will go as planned, the work is never boring.

Not all events fulfill a high-minded purpose. Some serve purely as entertainment. Some throw parties to reward achievement. Some promote a brand or launch a new product. But we want to be part of these too because they can lift spirits, encourage progress, and enable prosperity. People leave better informed, better connected, and more confident than when they arrived. Sometimes, they change the world. That's our job, and it's a job that matters.

WHO SHOULD READ THIS BOOK

This book is for anyone who is curious about how concepts become real events that provoke positive action. Maybe you're an event planner, and you want to up your game. Maybe you're planning a special event and hope to pick up a few pointers. Maybe you're a specialist in experience marketing and interested in expanding your knowledge. Maybe you're looking for a career that keeps changing, growing, and challenging you in new ways.

IS A CAREER IN LIVE EVENTS RIGHT FOR YOU?

Are you the kind of person who dreads the tedium of repetitive nine-to-five office work? Do you like to travel? Do you enjoy fresh challenges and new opportunities? Then there may be no better employment for you. Event creation is a team sport. The sense of being part of a high-performing team, building interdependent relationships, and accomplishing amazing things together is what motivates us and keeps us going. This line of work enables you to meet interesting people and work with some of the finest, most resourceful professionals you can imagine. However,

this work is not for everyone. Events happen on a rigid schedule, usually booked months or years in advance, and the on-site requirements are unforgiving. Weekend work, long hours, and short holidays are the norm. If you long for adventure and excitement, it could be the ideal career choice for you.

We know people from every academic background who have found meaningful careers in our industry: Creative people who struggled to feed their families in the theater world now make good livings as writers, directors, lighting and sound designers, stage managers, and producers of live events. High school graduates with some experience in drafting or carpentry are in high demand in fabrication shops. We know history majors who now manage corporate accounts and leaders who hated college but discovered they had a knack for thinking on their feet and staying calm in a crisis, making them perfectly suited for logistics work in managing load-in and load-out on the show floor. Architects enjoy the thrill of exhibit design, essentially building a small town in a few months and tearing it down again in three days. Programmers and tech workers weary of Silicon Valley use the latest innovations to support the people who attend the events we produce. Homebodies can provide phone support for exhibitors, while exhibitor services staff can travel to a new city every week.

Every type of traditional office job is still required to run the businesses that operate within the events industry. We hire accountants, lawyers, administrative assistants, human resources executives, training experts, and marketing and communications professionals—and they are all proud to be part of an industry that brings people together to make important things happen.

WHERE WE'RE COMING FROM

Creating an event requires a wide range of people, including the organization behind the event that employs staff to oversee it; the agencies, contractors, and suppliers who help them produce it; the exhibitors and

sponsors who pay for their presence there; the audience who attends and participates; and the venues and hospitality partners who provide a place for the event to happen.

The variety of events is infinite, but as we discuss these unique experiences, we tend to speak in terms of a prototypical event. For example, many events include a meeting or conference, educational and networking opportunities, and an exposition or trade show. Associations or companies in the business of holding events typically host these shows, and the audience tends to consist of members of the hosting organization, its customers, or interested members of the public. Sponsors or exhibitors often participate so they can market to the event audience. Many corporations host their own internal events (for company meetings, team building, or product training) and exhibit at events in their business sector. These elements combine to characterize the prototypical event we tend to refer to in this book. Our goal is to demonstrate that the methodologies recommended here can be effective for any type of event. Every event should honor its obligation to the attendee and the host, which means meeting their needs while keeping an eye on the budget.

A STRATEGY FOR CONTINUOUS IMPROVEMENT

We've structured this book around a four-phase event methodology: 1) getting started, 2) designing the plan, 3) working the plan, and 4) reviewing and improving after the event wraps up. This process isn't magical, but we hope your results will be. For events held periodically, annually, or more frequently, this process is a continuous cycle. For shorter timelines, the phases may be compressed, but they still apply.

We base these four phases on a sensible foundation that includes these four concepts: 1) taking time to get the plan right before rushing ahead, 2) aligning your action plan against agreed-upon budgets and timelines, 3) doing things on purpose instead of just letting them happen, and 4) insisting that each new event improves upon what came before.

THE FOUR PHASES



Phase 1: Get started. Build a multidisciplinary team.

Articulate a strategic direction and ensure that everyone on your team agrees to pursue it. Build a strategy brief that lays out the specifics, assigns them success metrics, and drives your next steps. Imagine the event in detail, including every aspect of fulfilling the requirements of your strategy brief. Build an in-depth creative brief and implement a project-tracking system.



Phase 2: Design the plan. Design the event from start to finish. Create an event budget, a production schedule, and a finalized timeline. Write an in-depth event plan, and make sure everyone approves it, as it will act as the blueprint for the professionals who actually execute the event.



Phase 3: Build the plan. This includes what most people think of as “showtime,” or going into production. This phase is where things get real—creating signage and exhibits, finalizing content, and building everything needed. “Everything” can be defined as your extensive list of deliverables, including the installation and execution of the event at the venue, followed by loading out (also known as *striking*) the event. This phase is the culmination of months of work—an exciting and challenging time.



Phase 4: Review and improve. Celebrate the wins and recognize where you need to improve. A wrap event enables your team to participate in a debrief regarding key lessons learned, including budget reconciliation and other annotations to inform future events. File and share all documentation and other relevant materials so the next event starts from a place of seasoned insight.

HOW TO USE THIS BOOK

This book is designed to help readers find what they need, whether they read it cover to cover, dive straight to their area of interest, or consult it as a quick reference. As each phase is introduced, you'll find a summary of action items covered in that section. Each chapter in these four phases starts with a brief to-do list and features useful lists and helpful bulleted guides that are called out in gray boxes. For readers who are just thumbing through, this suggests an area to focus on. We've also included a feature labeled "Pro Tips," which offers strategic insights suggested by the experts we interviewed along the way. All of this content is designed to elevate your event planning and help ensure a memorable, effective experience for all participants. An index is provided at the back to help you jump directly to any specific topic.

THINKING LIKE A DESIGNER

Event design requires that everyone on the team think like a designer. This approach is foundational to every phase of the cycle and every execution within each phase. Simply put, *design thinking* means every team member should always be looking for ways to make the event better. Design thinking leads to design doing. Unless you're prepared to let things happen by accident, start off by designing a comprehensive event plan that addresses all the moving parts.

EVENT ORCHESTRATION

Approach the various aspects of an event the way a conductor leads an orchestra. The ideal event should lead participants on a journey, exploring different expressions of a unifying theme. A narrative provides a beginning, middle, and end to the experience, with motifs exploring different

subthemes. Dynamic elements diversify the color, volume, mood, and expression. Ideally, every participant (whether attending virtually or in person) can become the hero of their own journey.

Personalization involves examining each aspect of the possible choices your attendees will make along the way. If you've designed the experience properly, attendees won't ever see the blood, sweat, and tears that went into making the event happen. They will just enjoy the journey, feeling empowered to consume content how and where they like. Enable personalized journeys by integrated technology like agenda planning tools, apps that help make the most of their time, and just-in-time choices that enhance their unique experiences in an intuitive, nonintrusive way.

A NOTE ON TIMING

This book focuses on the design and execution of a specific event but does not address the marketing and communication plans, which are necessary to any event. The scope of our methodology begins after the completion of foundational work, including vital arrangements regarding the event's concept, purpose, and dates (often nonnegotiable by the time our methodology kicks in). Our first phase begins after the decision to hold an event has been made and starts with the design decisions required to make the event successful.

ATTRACTING EXHIBITORS, PARTNERS, AND ATTENDEES

The extent of exhibitor marketing required to sell out an event show floor varies widely between events. Event sponsors are often happy to return to a large event with proven success. Brands pay for their presence at an event (signage, swag giveaways, promotions, exhibits, etc.), and event managers create marketing materials that demonstrate the value of an upcoming event offering (often the first "deliverable" required of the event team).

The event's marketing plan should also include strategies targeting different audiences with a discrete value-based message. Materials created to promote the event campaign involve some combination of direct marketing, social media, paid advertising (print and online), and earned media (press coverage obtained through public relations efforts). Most events also feature a dedicated website that includes an online registration process and provides value-specific information to promote the event.

The old notion of B2B vs. B2C marketing (business-to-business vs. business-to-consumer) is obsolete. Every event participant is now a consumer because that's how they see themselves. Your event marketing plan should do more than sell registrations and floor space; it should enhance the perceived brand equity of your event, elevate your organization's larger brand efforts, and inspire committed participation.

Our four-phase methodology provides a useful way to think about all of these things, while creating an actionable plan for a successful, memorable event.

Glossary

Interviewing the subject matter experts (SMEs) who informed this book reminded us that industry professionals sometimes use one word to mean different things. For our purposes, we've assembled a list of frequently used terms, along with the meaning we usually imply when we use each of these terms.

Account lead—The person at the agency or general services contractor (GSC) who acts as a client's go-to team member. The account lead is responsible for conveying client needs and expectations to the event team, overseeing the efforts of other departments, understanding everything important about the client, and sharing new information. The account lead may collaborate with or double as the executive producer to manage the budget and may also lead the logistics team.

Agency—The marketing partner, production company, or GSC fulfilling event design and production on behalf of their client.

Audiovisual team (AV)—The team responsible for installing equipment used on the exhibition/trade show floor and for the “show” aspect of an event, including set design and production, lighting and audio design, crew staffing, and installing and dismantling the show itself. AV provides

staging solutions and expertise and assists in the production of virtual, hybrid, and in-person events.

Association events—Events hosted by an association representing members who share a profession, industry, social or political cause, or other affiliation. Annual or semiannual conferences and trade shows bring their members together and provide opportunities for education and commerce. Association events typically charge fees to cover their costs and to raise funding for their overall mission, but their explicit purpose is serving members rather than generating profits or marketing their brand.

Content—Words, images, video, and other “contents” within a communication piece or publication. A content designer or a member of the creative team usually develops content.

Content designer—A member of the creative team who develops the messaging strategy for an event, including visual components and the text or scripts that accompany them. This person should be fluent in multiple forms of media and able to coordinate messaging across all platforms used during an event.

Core team—Members of all the key disciplines involved in the event from start to finish. This team usually includes an account lead, executive producer, creative director, and logistics expert, and may also include strategists, content designers, and experience designers.

Corporate events—One of the more useful channels in a corporation’s marketing portfolio. Corporations may host their own specialized events or may sponsor or exhibit at events organized by others to maintain a brand presence at conferences and trade shows throughout the world. Unlike for-profit show organizers, events function as marketing tools for corporations, not as their core business.