The New U: Forging Success through Uncertain Times - Part II: Total Makeover - Enhancing Your Role in a Changed World

DAVID SAEF, CTSM GOLD
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Session 6043

The New U: total makeover – enhancing your role in a changing world

DECEMBER 22, 2020

Definitions

Event: a gathering that takes place with a defined start time and end time

Onsite: an event in which participants are in a physical location / face to face

Virtual: an event in which participants participate online

Hybrid: an event that includes a live onsite presence and a live virtual presence

Digital: an interaction that takes place online (digital is everything that takes place that is not an onsite or virtual event)

• Digital marketing campaign
• Hosting or participating in an online forum, learning / certification program
• Social interaction
• Interaction on a third party platform (Twitch, YouTube, etc.)
The New U: Session 6042 Recap

ELC#1: Take ahold of your destiny  Page 12
ELC#2: Align with your stakeholders  Page 27
ELC #3: Expand your influence  Page 36
ELC #4: Pick your place – then own it!  Page 42

Return to onsite events not expected before Fall 2021

NOW  NEAR  NEXT
12%  31%  50%  68%  74%
82%  84%  85%  87%


Note: Respondents: 6,640, Margin of Error: +/- 1.2%
Source: Freeman Pulse Survey

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Insights: What does this mean for the New U?

- Acknowledge online is valuable for building the pipeline and brand awareness
- Recognize online struggles with accelerating the pipeline and closing deals
- Prioritize well-designed content

Online First
- Winter 2020-2021 (Dec-Feb)
- Spring 2021 (March-May)
- Summer 2021 (June-August)
- Fall 2021 (Sept-Nov)
- Winter 2021-2022 (Dec-Feb)

Smaller In-Person + Online
- Spring 2022 (March-May)
- Summer 2022 (June-August)
- Fall 2022 (Sept-Nov)
- Winter 2022-2023 (Dec-Feb)

Safe Return to In-Person + Ongoing Engagement
- Spring 2023 (March-May)
- Summer 2023 (June-August)
- Fall 2023 (Sept-Nov)
- Winter 2023-2024 (Dec-Feb)

- Focus on quality attendees for the in-person
- Determine which level of hybrid/integrated works for your organization
- Continue to recognize the signals of change — at the individual, social and environmental level

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Step 5: Leverage virtual at the top of funnel and onsite for the bottom of the funnel

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The aim is to drive outcomes through a coordinated approach.

How to proceed?

**Virtual Options**
- Launch stand alone event / product site
- Launch a microsite tied to company website

**Onsite Options**
- Mobile tour / guerilla marketing
- Corporate event (user group, product launch, internal, executive summit, B2C outreach)

**Benefits**
- Full control of the medium / message / data
- 100% audience attention / engagement

**Risks**
- Leveraging resources / bandwidth
- Need to understand and execute all elements

**Go it alone / DIY**
- Participation as "exhibitor" or sponsor
- Do minimum participation as exhibitor/sponsor and link to own site

**Participate in someone else's event**
- Tradeshow / Conference presence (booth, private event, sponsorship etc.)
- Speaker / sponsor participation at a small meeting

**Benefits**
- Competition for audience attention / engagement
- Less control on where and how to participate
- Some limits on audience data / insights
New Engagement Model

THE INTRODUCTION

Hybrid Online + In-Person

THE NEW HYBRID EXPERIENCE

Online-Focused Audience with Live engagement

COMMUNITY TOUCHPOINTS

Local Pop-Ups

Launch Online Experience

Hybrid Virtual & In-Person

Curated Content Channels

Community Building

The Live Launch

Exclusive In-Person Audience

THE LIVE LAUNCH

Creating WOW Moments

Concise with Online Channel Updates

Local Pop-Ups

Resources to Stay Connected to Hybrid & COVID trends

COVID-19 sites

- Johns Hopkins interactive map: https://coronavirus.jhu.edu/map.html

Research Reports (note that the industry sites below also have published research)

- Freeman Research reports: http://gsp.freeman.com/research.html
- Event Horizon (Freeman research in bite-size videos): https://www.youtube.com/watch?v=znH4SUkqTlw&list=PLzoc-kFM2F66qT6jP-FW1A3OC38b4M
- Explore Global Study on the Future of Virtual & Hybrid Events (Press Releases only): https://www.explori.com/gri-part1

Industry sites (Focus on COVID and Hybrid/Digital practices)

- Go Live Together (coalition to advocate for exhibition industry recovery – contains updates on industry practices/trends): https://www.golivetogther.com/
- Event Leadership Institute: https://eventleadershipinstitute.com/
- MDG Inner Circle posts/newsletter: https://www.mdg.agency/innerc/
- PCMA / CEMA Coronavirus Resources & Insights: https://www.pcma.org/coronavirus-business-events-professionals-need-to-know-faq/
- MPI Novel Coronavirus Resources: https://www.mpi.org/tools/coronavirus

Industry Leaders

- Howard Givner, CEO, Event Leadership Institute: https://www.linkedin.com/pulse/road-ahead-events-industry-2021-beyond-part-1-vaccine-howard-givner/?trackingid=85fY9Z7laaSDNfN61x4kZa%2FA3D41D
- Corbin Ball: https://www.corbinball.com/
Key Principles

Data → Insights → Decisions → Actions → Data

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Self-Assessment: Print off and circle the appropriate answer

<table>
<thead>
<tr>
<th></th>
<th>1 Pt</th>
<th>2 Pts</th>
<th>3 Pts</th>
<th>4 Pts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Right now, I feel</td>
<td>Concerned about the future</td>
<td>Confused / overwhelmed by circumstances</td>
<td>Pragmatic that I/we will get through this</td>
<td>Motivated to forge ahead</td>
</tr>
<tr>
<td>2. At my company, I am regarded</td>
<td>As an able executor of our program</td>
<td>As a trusted employee who can handle more</td>
<td>As a constructive partner in the live event/tradeshow space</td>
<td>As a respected, strategic leader</td>
</tr>
<tr>
<td>3. Prior to 2020, I would rate my program as</td>
<td>A program in need of a revamp</td>
<td>A reliable program responsive to requests</td>
<td>A solid performer to objectives</td>
<td>Top notch / cutting edge</td>
</tr>
<tr>
<td>4. Right now, I am managing our program</td>
<td>Reactively and with limited resources</td>
<td>Mix of reactive and proactive, though not a clear direction</td>
<td>We have a direction, but I need help getting there</td>
<td>We are optimizing, and I want to sharpen my toolkit</td>
</tr>
<tr>
<td>5. My goal over the next 12 months is</td>
<td>Feel more informed and able to execute</td>
<td>Feel better equipped to address emerging needs</td>
<td>Feel that I am providing inputs to our future course</td>
<td>Feel that I am driving the ship with the encouragement and support of key stakeholders</td>
</tr>
</tbody>
</table>

Everyone proceeds through the recovery process at a different pace

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Uncertain times require singular focus

- What do we need to achieve in the next [1 month, 3 months, 6 months, 12 months, 3 years]?
- Where do we expect to be in 5 years?
- What is holding us back?
- When can we expect barriers to be removed?
- How will we remove those barriers?

Exercise: Expectations Statements

Describe what you hope to have achieved by December, 2021

Describe what you hope to have achieved by December, 2025
In these times, we can boil things down to 3 dynamics

- When can we expect COVID and the resulting travel/economic impact to subside?
- What should we do until those changes take place?
- How can we implement an agile approach?

Monitoring COVID & related impacts

- Develop Information Inputs
- Highlight New / Emerging Practices
- Develop a dashboard to highlight key findings / recommendations
Monitoring COVID & related impacts

Develop Information Inputs

Highlight New / Emerging Practices

Develop a Dashboard highlight key findings / recommendations

- Event calendar updated for status
- For hosted events, key inputs on COVID incidence / health & safety measures at attendee origination and destination
- Information on audience content consumption habits
  - What are top of mind issues / concerns
  - What products / solutions are most of interest
  - Where are audiences congregating online / onsite
- What can we say or do now to help alleviate these pain points?
  - What products / solutions can we offer?
  - What tools / white papers can we publish?
  - Which experts can we use to connect / solve problems?

• What are new practices organizations are undertaking?
  • Look globally
  • Highlight key events / practices
• What new tools are available?
  • DIY & professional marketing, content development, platform selection and execution, metrics dashboard
• Who is pushing the envelope and how?
  • Collect case studies / articles
  • Interview peers / industry leaders / agency partners

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**Monitoring COVID & related impacts**

- Objectives – where do we want to be?
- What are the key “signals” we need to watch?
- What are customer/prospect top needs / challenges?
- How are we best placed to meet those challenges?
- What steps / resources / budgets are required?
- What are the top 3-4 initiatives we should undertake to realize this new vision?
- What progress are we making to realize this near-term vision?

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**Set measurable, actionable objectives**

- Who is the target audience?
- What do we wish to happen with the audience?
- What do we wish to communicate to the audience?
- How will we measure success?
Step 1 Business / Program Objectives Example

<table>
<thead>
<tr>
<th>Business Mission</th>
<th>Bring joy and happiness to people</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Principles</td>
<td>Keep the belief</td>
</tr>
<tr>
<td>Opportunity / Challenge</td>
<td>Remind people that amidst one of the worst years in human history, the myth, mystery and joy of Christmas continues courtesy of Santa, Mrs. Claus and their elves</td>
</tr>
<tr>
<td>Business / Brand Objectives</td>
<td>Renew faith in Xmas</td>
</tr>
<tr>
<td>Event Objectives</td>
<td>Deliver XX bn packages to children and adults</td>
</tr>
<tr>
<td>Content</td>
<td>Key elements:</td>
</tr>
</tbody>
</table>

Build agility into everything

*It is not just the process of what we do, it is also about how we do it*

- Although originally designed as a way to develop code, the Agile methodology is now far more widely used as an approach to change ways of working within leading organizations
- The concepts are based on working really closely with our customers — gaining insights from them in order to identify new opportunities and then working with them to test, learn and iterate
- Failure is seen as a positive outcome because it allows us to test ideas and disregard them quickly before we spend significant time, effort and funds
- It does require a change in mind-set but can be taught to any organization — we have already shown many of the fundamentals
What can be done NOW to address disruptive trends?

• What should we STOP NOW?

• What should we START NOW?

• Which investments do we need to make that will manifest in 6-12 months?

The Three Box Solution

BOX 1: Company / Program Today
• Manage the Present: Optimize the current business to reach peak efficiency and profitability

BOX 2: Company / Program of the Past
• Forget the Past: Let go of the values and practices that fuel the current business, but fail the new one
• Escape the traps of the past by identifying and divesting businesses and abandoning practices, ideas, and attitudes that have lost relevance in a changed environment

BOX 3: Company / Program of the Future
• Create the Future: Invent a new ‘business model’
• Generate breakthrough ideas and convert them into new products, businesses, and practices
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Assessment of Stakeholders: Company Status / Leadership Style

Write down the initials of 3 stakeholders in place of SH1/2/3 and then check statements that are true

<table>
<thead>
<tr>
<th></th>
<th>SH 1</th>
<th>SH 2</th>
<th>SH 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is ambitious</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is a change agent</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frequently promoted</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Power Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gaining in voice / influence</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Losing voice / influence</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staying under radar screen</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current state</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Includes me in dept/company strategy discussions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Makes sure others coordinate with me</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management style</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Treats me as confidante – shares inside information with me</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Looks for opportunities to help me grow</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provides direction after some consultation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provides direction with little to no consultation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hands-on / double checks my work/follow through</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Assessment of Stakeholders: Response to Disruptive Trends

Copy the initials of 3 stakeholders from the prior page and then check statements that are true.

<table>
<thead>
<tr>
<th></th>
<th>SH 1</th>
<th>SH 2</th>
<th>SH 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>COVID</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Worried / paralyzed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taking charge</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staying under radar screen</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Understands need for organizational / business change</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes and ready to make it happen</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes, but unsure what to do</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Waiting to be told</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Detached</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>New / emerging engagement model support</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wants to hear/know what is happening with others</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interested to know latest and to develop a plan to keep pace</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forging ahead with new practices without my involvement</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asking my viewpoint then forging ahead</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crafting the future with my input</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**Listen, watch, learn - react**

- What are your stakeholders saying / doing?
- Are they including you in discussions related to your area? Are you a “go to” for information?
- Are stakeholders relying on you for information?
- Is overlap occurring? What may be prompting this?
- Who are your coaches / confidants?
Adapt your leadership and communications to different stakeholder styles

• “Change up” Charlie
  • Reactive and ready to change things without a lot of consultation / review
  • Approach: Understand his perspective and area of influence, build rapport through providing information and insights to buy collaboration / consultation

• “My way” Mary
  • Used to run the program before and during the last 2 economic downturns, micro-manager
  • Approach: Consult on prior experience, listen, learn and relate prior experience to current situation, important to “pre-wire” Mary so she feels consulted and bought in to observations and recommendations

• “Don’t rock the boat” Ray
  • Been a company a long time, risk averse, under the radar screen
  • Approach: Regular communications, assurance that there is a plan to proactively address changing circumstances. Also time to find / add coaches & confidants to your bench

• “Doubting” Donna
  • Regularly shares counterpoints or promotes own department (marketing, business intelligence) rather than rely on events team to drive
  • Approach: Listen and understand view, DON’T refute, identify areas of common thinking and pragmatic steps to take where there is alignment

• “Clueless” Carl
  • Never got in the weeds of the event program, concerned about spend and ROI
  • Approach: Invest time to educate and feed ideas that can be shared up the ladder; help make Carl an advocate

• “Rush Ahead” Rashida
  • Always willing to push the bar and try new things. Impatient, action oriented, and not always willing to seek buy-in from all stakeholders
  • Approach: Educate and share thinking with Rashida; allow her to consult with you, yet (depending on power dynamic) enable her to lead. Be sure to warn (gently, in writing) when Rashida go too far too fast
Dealing with objections

Answer immediately

• Know you can change / implement with certainty
• Answer is straightforward and well known
• Can action right away

Buy time

• Need to compile information and analyze
• Need to consult with other parties (event organizer, tech platform, dept. head, etc.)
• Need to build support for alternative approaches / viewpoints

How to respond

• There is a desire and expectation that you will be agreeable
  • “Absolutely, we can make that happen”
  • “That is a great suggestion, let me look into that…”
  • “Good point, let me coordinate with __________ and get right back to you”
  • “We can do that, or we can do ________________. Do you have a strong preference?”

• How to handle unrealistic suggestions / viewpoints
  • “I hear you – let me look into it…”
  • “Great thought – unfortunately, the organizer will not allow / the platform cannot / healthy and safety measures place certain limits…; nonetheless I will check with [department head, show management] to see if we can identify an alternative that works
How to respond – Don'ts

• Don't respond flippantly

• Don't say “NO” outright – better to manage with “I hear you and will look into…” – don’t prompt people to go over your head or around you

• Don't agree unless you are sure you can and will implement – people are open to pushback or clarifications especially under these changing circumstances
Expanding your influence

- **Do communicate regularly with stakeholders**

- **Do develop different communications to help solidify support**
  - Trends & Best Practices updates
  - Change program scope (objectives, key measures, initiatives)
  - Performance dashboard (on event activity, Stop/Start status)
  - 30-, 60-, 90-day plan / implementation and updates
  - Event, quarter and YTD plan

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Expanding your influence

- **DO meet with stakeholders to get feedback**

- **DO make sure that briefings / dashboards / intel is shared with C-level**

- **When requests executive participation in an upcoming virtual/hybrid/onsite event, highlight event strategy and their role in achieving outcomes**
  - What is the aim of the event
  - How do we define success and what progress has been made so far
  - How will executive involvement accelerate success / deepen client relationships
  - If metrics are underperforming, what actions are in process to improve or to eliminate wasted spend/effort
  - What other risks remain?

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Do you need to be loyal?

- Yes and No

- Yes – if you are leading or participating in executing the strategy / course of action, peers need to know you are aligned and staying focused

- Yes - if stakeholders and executives have empowered you, it is important to stay the course until and unless circumstances change required a rethink on the strategy

- No – you should no blindly follow someone’s lead – you are paid to think and make suggestions

- No – follow a simply rule of thumb
  - Clients first
  - Company second
  - Self last

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Always remember – there is a village here to support you

- Tap experts in the industry – thought leaders, pioneers, researchers
  - Technology: Corbin Ball, Dahlia El Gazzar, James Spellos, Liz King
  - Measurement: Ian Sequeira, Parul Shah, Joe Federbush
  - Experience (Event Leaders): Mary Fernstrom, Bob Bejan, Nicola Kastner, Victor Torregroza
  - Experience (Media Coverage): Travis Stanton, Linda Armstrong, Jessica Heasley, Rachel Wemberly, David Adler, Julius Solaris, Howard Givner
Always remember – there is a village here to support you

- Let data and insights guide your recommendations
- Accept failure
- Embrace agility
- Focus on results
- Attitude and being a go-to matters
- Nothing else matters

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Picking your place – and getting there

• How are you regarded today?
• How do you intend to be regarded tomorrow? Next week?
• What are you doing to build your capacity?
  • Do / Build Model
  • Habits
    • Weekly time to “build” – focus on priorities, read the “Tickler” file, renew priorities
    • Monthly time to learn
    • Regular cadence of sharing, exchanging, mentoring, branching out
  • Specific aims around internal & external influence
  • Step changes come from
    • Outsize performance
    • Influence
    • Credentials
    • Leverage / Staff

Do
Build
Little
Do
A Lot
Limited Knowledge / Priorities
Leverage / Power / Impact

Expand your influence – highlight 3 departments in which your connections / collaboration needs to increase at least 50%

Dept 1:
Dept 2:
Dept 3:

What’s holding you back??

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Expand your influence – externally

- Where are you participating online?
- What are you sharing?
- What content are you generating that is being shared by others?

How to monitor your influence?

- Internal
  - Are you a go to?
  - Does your mentor/coach understand your vision and are they providing advice/support?
  - Are your reports/work being shared at a higher level?
  - Do people recognize you as an expert in the current circumstances?

- External
  - Do others reach out to you for your perspective?
  - Do you monitor your frequency of participation?
  - Do you monitor shares/likes/callouts?
Taking Stock

- Monitor progress against your goals every month
- Check in with your boss every month and your stakeholders every quarter
- Continue to build relationships with new peers – solicit their perspective and gain their trust
- **Drive results – be ruthless**
  - Propose actions that are needed today
  - Be willing to implement drastic changes (while still recognizing risks)
  - There is no proven way anymore – accepting risk is not only acceptable it is expected
- **Be honest with yourself**
  - Will your current position, responsibilities and reputation get you where you want to go?
  - Is this the best place to get you there?
  - Can you manage a search if the current position will not achieve your vision? If not, what do you need to do to increase your capacity to look (Do/Build)?

Exercise: As a result of today’s sessions what are three things you intend to change in the next 6 months?

1. 

2. 

3. 

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thank you

got questions?

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