2027 Event ROI Planning Worksheet

Before You Approve Another Event Budget, Answer These Five Questions

As you build your 2027 event strategy, don't start with the calendar. Start with the outcome.

Use this worksheet to evaluate every tradeshow, conference, customer event, sponsorship, executive meeting, SKO, or internal event under consideration. If you can't answer these questions, it may be worth reconsidering the investment.

Event Information

Event Name	
Event Date	
Event Type	☐ Awareness Event ☐ Pipeline Event ☐ Customer Event ☐ Leadership & Community Event ☐ Other: _____
Estimated Budget	

Question 1:

What Business Goal Does This Event Support?

What's the primary reason this event deserves a place on your calendar?

- [ ] Brand Awareness
- [ ] Lead Generation
- [ ] Pipeline Acceleration
- [ ] Customer Retention
- [ ] Customer Expansion
- [ ] Community Building
- [ ] Partner Engagement
- [ ] Team Alignment
- [ ] Market Expansion
- [ ] Thought Leadership
- [ ] Other: _____

Notes:

_____

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Question 2:

Who Owns the Outcome?

Every event should have a clear owner responsible for driving results.

- [ ] Marketing
- [ ] Sales
- [ ] Customer Success
- [ ] Executive Leadership
- [ ] HR/Internal Communications
- [ ] Partnerships
- [ ] Shared Ownership

Primary Owner: _____

Supporting Stakeholders: _____

Question 3:

How Will Success Be Measured?

Choose the metrics that best align with your event's primary objective.

Awareness Metrics ☐ Brand Visibility ☐ Media Coverage ☐ Social Engagement ☐ Content Downloads ☐ New Audience Reach ☐ Other: _____	**Pipeline Metrics** ☐ Meetings Booked ☐ Qualified Opportunities ☐ Pipeline Influenced ☐ Revenue Generated ☐ Opportunity Progression ☐ Other: _____
Customer Metrics ☐ Retention Rate ☐ Expansion Opportunities ☐ Customer Satisfaction ☐ Product Adoption ☐ Advocacy Development ☐ Other: _____	**Leadership Metrics** ☐ Team Alignment ☐ Employee Engagement ☐ Strategic Initiative Adoption ☐ Partner Engagement ☐ Other: _____

Primary KPI:

_____

_____

_____

_____

Question 4:

Which Stakeholder Priorities Does This Event Support?

Different teams define success differently. Ensure alignment before the event begins.

Stakeholder	Priority Supported
Marketing	

Sales	
Customer Success	
Leadership	
Partners	

Are all stakeholders aligned on how success will be measured?

- ☐ Yes
- ☐ No
- ☐ Needs Discussion

Question 5:

What Happens After the Event Ends?

The event itself is only part of the investment. ROI is often determined by what happens afterward.

Post-Event Action Plan

- ☐ Lead Follow-Up Process Defined
- ☐ Customer Follow-Up Meetings Scheduled
- ☐ Executive Debrief Planned
- ☐ Content Repurposing Strategy Identified
- ☐ Customer Nurture Program in Place
- ☐ Pipeline Review Scheduled
- ☐ Success Metrics Dashboard Created
- ☐ ROI Review Date Established

Key Follow-Up Actions:

_____

_____

_____

_____

Final Evaluation:

Before approving this event, answer one final question:

If this event disappeared from next year's calendar, what business objective would be left unsupported?

_____
_____
_____
_____

If the answer isn't clear, you may need to revisit the event's purpose before allocating budget.

Quick Portfolio Review:

When evaluating your complete 2027 event portfolio, aim for a balanced mix of:

- ☐ Awareness Events
- ☐ Pipeline Events
- ☐ Customer Events
- ☐ Leadership & Community Events

Organizations often don't need more events. They need a portfolio of events that work together to support business goals.

What Outcome Are You Actually Buying?

Too many event calendars are built on tradition instead of strategy. Before finalizing your 2027 event portfolio, make sure every event has a purpose, an owner, and a clear path to business impact.

Need a second opinion on your event strategy?

→ Schedule a Planning Conversation with Our Team

EMC
MEETINGS & EVENTS