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# Inventing the Future of the Conference

Elite Retreat Executive Summary



Robert B. Tucker, President, The Innovation Resource Consulting Group

# A Note to Conference Professionals



Dear Reader:

Several years ago, during the depths of the Great Recession, I began to notice how the conference industry was bifurcating. Some events were being disrupted and even cancelled, while others commanded waiting lists of people willing to pay thousands of dollars to attend.

I saw that attendance was declining in some sectors, while exploding in others – for example TED conferences and those produced by magazines like The Economist, Fortune, Chief Executive and many others.

I also observed first-hand how the pressure to do more with less and exceed last year's numbers was intensifying for everybody in the industry. And because of my 25 year career as an innovation speaker and consultant, I wanted to bring that spirit of possibility thinking to an industry that I believe is vital to the betterment of society the world over.

So I decided to organize a retreat for senior level conference executives. I wanted to create a space where top professionals could, in a relaxed, intimate environment, explore these industry dynamics and ponder the shape of the future. The response exceeded my wildest expectations.

We were privileged to attract conference producers from a leading software company, from The Conference Board, from ASAE, and leading trade associations and for-profit conference producers, such as Lincoln Healthcare Events. I asked each executive to ponder the question “what is the future of the conference industry” and come prepared to discuss key challenges and best practices.

What they spawned was not just an incredibly meaningful event, but some provocative ideas which, thanks to Mark Krasnow, founder of BullsEye Reports, we are proud to share with you in this Executive Summary. Please let me know if you'd like to be notified of the next Elite Retreat, which we have scheduled for August, 2013.

Executive Summary of Elite Retreat  
produced by BullsEye Resources.  
[www.bullseyeresources.com](http://www.bullseyeresources.com)

Sincerely,

Robert B. Tucker  
President, The Innovation Resource Consulting Group  
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# The conference industry is undergoing a period of profound change. . .conference organizers need to fundamentally reinvent the entire conference experience



"Everything is an opportunity to maximize the value of the conference experience."

– Elite Retreat Participant

## Overview

Due to a proliferation of conferences during the last five years, even successful conference organizers need to fundamentally rethink their entire conference experience to deliver greater perceived value and return on investment. This requires revitalization and rethinking of education and networking and community building within the context of the meeting itself. It entails creating events that are inspirational and thought-stimulating; that deliver new value towards a specific thematic purpose; and that surprise and delight because they are immersive and multi-sensory, rather than merely informational and predictable.

Envisioning the conference of the future requires thinking ahead of the curve, enormous creativity, collaboration skills, innovation, experimentation, and risk-taking. Peer-to-peer networking among industry leaders, such as was demonstrated by the Elite Retreat, can provide opportunities for personal growth while sparking transformative ideas.

## Context

Held in Santa Barbara, California, August 21-23, the first ever Elite Retreat was conducted by Robert Tucker of The Innovation Resource. The Elite Retreat brought together conference industry leaders to discuss trends and mega issues, share best practices, discover ways to add value and increase attendee loyalty, reignite each person's visionary conference designer, and invent the future of the conference.

In addition to leading conference organizers, the group was joined by award-winning composer Gary Malkin, creativity expert David Moore, and speaker Terry Paulson. Each participant had their own key takeaways and contributed "keepers." Some of the key themes and keepers from the Elite Retreat are summarized below.

# Multiple disruptions are taking place in the conference industry, causing rapid change.

**\$263 Billion**

total direct spending associated with U.S. meetings activity

**205 Million**

Total number of U.S. conference and event attendees

**1.8 Million**

Total number of conventions, conferences, congresses, trade shows, exhibitions, incentive events, and corporate/business meetings in the U.S.

*Source: Convention Industry Council, February 2011*

In virtually every industry, significant disruptions are taking place, which creates high uncertainty and in many instances has dire consequences for industry participants. While the business models of most, but not all, Elite Retreat participants are healthy and growing, changes in the industry merit attention.

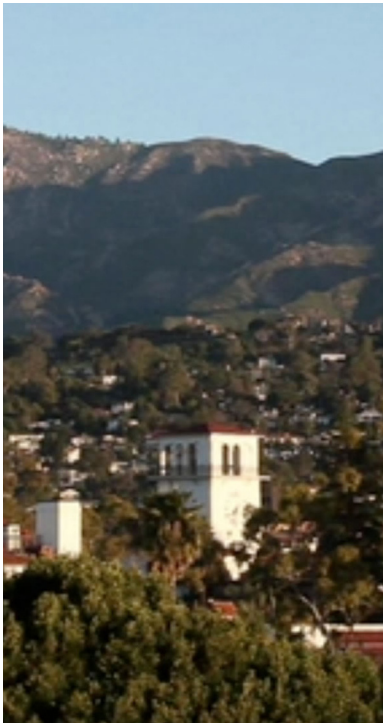
Among the major changes mentioned were:

- **Changing demographics.** With multiple generations in the workforce, conference organizers must gear educational, networking, and social experiences that appeal to and include each generation. In particular, younger generations have shorter attention spans and are greater users of technology.
- **New business and delivery models.** The TED conference is all the rage in the conference world. This event has multiple short (18 minute), provocative sessions, high fees for attendees (\$6,000), and the ability to view content via streaming video for \$3,500. As a result, TED—which doesn't pay speakers—is grossing \$23 million per conference. Other industry participants are trying to emulate aspects of TED's structure with shorter, provocative sessions.
- **New technologies.** Social media, conference apps, tweeting, and other uses of technology are becoming increasingly common. These changes affect how people access and share information, as well as how they communicate. Attendees now tweet in the middle of a session. Conference apps with the agenda and site information can reduce/eliminate the need to print programs, which can save in printing and shipping costs. The value of new social technologies is not yet clear, but the consensus is that technologies will change conferences and how they are delivered.
- **Budget pressures.** While TED conferences proliferate and may be flourishing, many other conference organizers are confronted with tight budgets and declining attendance.
- **Heightened competition for attendee loyalty.** The conference landscape is crowded and attendees have many options to choose from. Even "satisfied" attendees may not return if another event appears to meet their needs.

**"We are designing conferences for six generations."**

— Amy Ledoux, CAE, American Society of Association Executives

# Face-to-face meetings are not going away. But vision and execution is required to produce standout events that create buzz and engender loyalty.



"There is still a hunger for face-to-face."

— Elite Retreat Participant

At the Elite Retreat, each participant was asked to describe his or her professional background, business model, and current challenges. Many common themes emerged including:

- **Passion.** Participants, who have extensive experience in the conference industry, shared deep passion for organizing conferences and bringing people together for education and experiences. Participants know that "meetings still matter" but that conference-goers are fickle and unpredictable.
- **Peer network.** On a day-to-day basis, group members don't necessarily have peers in a similar situation with whom they can share ideas and challenges. For this reason, the peer-to-peer networking of the Elite Retreat and the opportunity for personal and professional growth had incredible value.
- **Purpose.** Just providing information to attendees is no longer good enough; people are saturated with information. Conferences must have a clear purpose and provide attendees with a sense of meaning. This starts with organizations and leaders that also have a clear purpose.
- **Focus.** Participants attributed previous success to the ability to focus on the unmet and unarticulated needs of attendees and to orchestrate focused events.
- **Wear multiple hats.** Effective conference organizers must be visionaries, leaders, detail-oriented managers, marketers, and executors. They must articulate a compelling big-picture vision, while ensuring that every detail is flawlessly executed. At times, the focus on the executional details overshadows being an innovative visionary. (An exciting part of this retreat was being able to focus on the big picture and innovation.)
- **Business expansion.** Several participants mentioned expanding into new areas, beyond traditional conferences. Conference organizers are also offering research or consulting services, or expanding to provide lead-generation services or to organize and manage smaller "councils."
- **Increased global scope.** Several participants mentioned that their organizations now think about organizing events in and marketing to people in multiple countries.
- **Risk taking.** Success has been based on constant experimentation and a willingness to take risks.



# Reinventing conferences requires subtle but continuous innovation to deliver even greater attendee value.



In today's hypercompetitive conference landscape, the quest to provide continually greater value is a journey not a destination. Elite Retreat participants described how they have innovated and continue to evolve in multiple ways. Efforts that participants are making to deliver greater value and engender greater loyalty include:

- **Segmenting attendees.** By segmenting attendees, it is possible to provide different learning formats that appeal to different segments. Segmenting also provides a way to create smaller, more intimate, more interactive groups even within large events. Creating conversation nooks is a way to allocate space to people with a shared interest in a specific topic.
- **Creative types of networking.** Networking is an important part of the conference experience. Creative examples of networking experiences include:
  - Speed dating, a structured form of networking that enables people with similar interests to meet others quickly and easily.
  - Matching up buyers and sellers or people who have expressed similar interests.
  - Having casual “lounges” for networking. Instead of sitting around a conference table or standing with a drink, people can flop on a comfortable couch. This provides a casual environment like the water cooler for meeting people interested in similar topics.
  - Increasing the length and frequency of networking breaks.
  - Having a party where attendees wear uniforms of their favorite sports team, which provides a natural icebreaker.
- **Quantifying value.** One association executive shared the example of a “justification tool” she recently adopted that quantifies the value of her conference and justifies the investment. Another participant described how his organization asks every attendee to quantify the value of ideas from their conference. All attendees derived more quantifiable value than the cost of the conference, with the top value being \$87,000. By quantifying the value it is possible to discuss the ROI of an event.
- **New models.** ASAE is incorporating the IGNITE format at many events. This model gives presenters a five-minute session with 20 slides that auto-advance. The presentation ends, with no exceptions, after five minutes. This format works best in a casual atmosphere. Another new model for ASAE is licensing content to be used in a train-the-trainer certification program.

# Great conferences focus on delivering a unique, compelling experience.

A great deal of the discussion at the Elite Retreat focused on going beyond a traditional, routine conference to create an immersive, compelling, unique and memorable experience. Multiple ideas and examples were shared about transforming the experience. Among them:

- **Include personal growth perspective.** Even though people go to a conference to gather ideas for their company or organization, deep down, they are also interested in personal growth, especially in today's world of rapid personal obsolescence. A great conference delivers not only information, but helps the attendee "connect the dots" and take action on the information provided. A world class conference is motivating, inspiring, and provides the personal growth that people are longing for.
- **Architect the experience.** Creating an immersive, compelling experience is about much more than just hiring speakers and recruiting breakout session leaders. It is about architecting and orchestrating from a big picture perspective, beginning with the end (result) in mind.
- **Artistry.** Compelling experiences engage all of the senses, as Emmy-winning composer Gary Malkin aptly demonstrated during his opening concert-lecture. Music and art engage people, tap into their emotions, and cause them to think and feel differently. One idea was to have a conference "weaver" who weaves art into the conference.

"Weave artistry into the conference. The experience is all about the senses."

– Elite Retreat Participant





“When you change the venue you can change people’s mindset and can increase innovation ... be emotionally literate about the space.”

– Elite Retreat Participant

- **Setting.** Location matters a great deal. The venue affects the mood, mindset, and the entire experience of participants. Don’t underestimate the importance of setting and carefully think about every detail of location, food, lighting, music, ambiance, etc. (For example, a networking event with very loud music hurts the experience.)
- **Add value pre, during, post conference.** The conference experience starts before the event and continues afterwards. Part of an immersive experience includes communication prior to the conference, the welcome, the experience at registration, all of the details of the onsite experience, the goodbye (which is often overlooked), and post-event follow up.

For example, 30 days after a conference an organization might have a webinar where a speaker reinforces key points and discusses progress since the conference. Or, an executive summary can be produced (such as this), conveying key takeaways that can be easily shared with others.

- **Using pictures and videos.** Attendees love to see photos of themselves. Take photos and show them on a big screen between sessions. Also, videos where attendees convey their “keepers” add to the experience. Consider doing a video of your conference, as was done at the Elite Retreat, [www.innovationresource.com/er2013](http://www.innovationresource.com/er2013).
- **Artists.** Graphic artists and cartoonists can capture an event’s narrative in the form of a visual story, which makes the content fun and engaging.
- **Surprises.** A great event surprises and delights. It provides attendees with something unexpected.



# Today's conference producer is a consummate benchmarker and adopter of good ideas. Many creative ideas already exist for innovating the conference experience.

Participants see upgrading and rethinking the educational experience as a key priority. Some of the group's ideas for working differently in delivering greater educational value include:

- **Eliciting desired learning in advance.** One idea is to contact attendees and vendors in advance and ask what they hope to learn at the conference.
- **Facilitating peer-to-peer learning.** People learn by hearing about the experiences of others; they want to hear from their peers, who have the same challenges. Interactive discussions among peers are highly valued.
- **Hire professional speakers who customize.** While sophisticated conference goers want to hear solutions from their peers, there is still a place for guest speakers who take the time to customize their messages to align with your theme, and who inspire and motivate attendees to take action.
- **Insure speaker alignment.** One idea, to ensure that speakers deliver messages that are consistent with the purpose of the conference, is to arrange a meeting of speakers prior to the event to ensure they understand the conference's purpose and integrate their presentations and do not overlap or duplicate other messages.
- **Recruit the right moderator for the entire meeting.** A great emcee builds a sense of community and continuity even amongst a sizeable turnout. A great emcee is other-oriented and not self-promotional, but rather paces the conference and enhances the educational experience by highlighting important takeaways and reinforcing major themes and assisting during Q/A sessions.
- **Leveraging speakers more broadly.** One idea is to not just have a speaker deliver a one-hour presentation, but to have a speaker meet with attendees over breakfast or lunch, or in a small group.
- **Action learning.** This involves groups working together to solve relevant learning.
- **Bite-sized learning.** This is education delivered in smaller bites. It can include shorter sessions, and focused facilitated conversations.

"The best part of a conference is putting me in the same room with people with similar challenges. I learn from my peers, and give away my best ideas."

– Elite Retreat Participant

# Conference innovation springs from a culture of innovation.



"If the rate of change inside an organization is less than the rate of change outside, you have to increase the speed."

– Elite Retreat Participant

Great value and a compelling experience are not one-time events; they require continuous innovation. But bureaucratic, insular and overly-political organizations slow the rate of adaptation to an ever changing external environment. Among the ideas about innovation that were discussed:

- **Mandate innovation.** Organizations that deliver the same conference year after year are doomed to fail. An idea is to mandate change. This might be mandating 10 new things each year; or focusing on five ideas that people will notice, or mandating that 20% of the conference experience is different.
- **Future success requires creativity and innovation, especially regarding the experience.** Continuing to do the same old things won't work. Conference organizers must innovate along multiple dimensions, including the education that conferences provide and the networking that occurs. In particular, conference organizers must innovate regarding the entire attendee experience. Rich experiences will have an artistic, multi-sensory component. Innovation is not a one-time event; it involves creating an organizational culture of innovation and processes for innovation.
- **Becoming comfortable with uncertainty.** Innovation is difficult because people's brains are judgmental of new ideas and are uncomfortable with uncertainty. David Moore (a presenter at Elite Retreat 2012) said that a key to innovation is, "Get your brain to be okay with uncertainty."
- **Peer-to-peer networking and personal growth are critical.** As a leader in the industry, each person is focused on leading their organization to innovate and invent the conference of the future, which isn't easy. Having a trusted forum for industry leaders to come together to share challenges and exchange ideas has tremendous value. This forum benefitted the organizations represented and each person who attended; the concept of the Elite Retreat resonated.
- **Create a culture of innovation.** Innovation is not a singular event; it is a process and a culture. Organizations with innovative cultures encourage the generation of ideas, focus on the "flow," understand there will be failures, and celebrate them.
- **Be able to execute innovations.** Just coming up with ideas isn't innovation. Innovative organizations are able to implement innovations. They prioritize their possible innovations and focus on the output and results.

## Outsiders to the conference business can provide valuable insights.

In addition to peer-to-peer discussions among those who are in the conference business, fresh perspectives can come from those with deep expertise in other areas. At the Elite Retreat, insights came from:

- **Gary Malkin**, award-winning composer. Gary's presence conveyed that compelling events create a sense of fun, relaxation, and trust. They engage the senses. He said, "Music is the sound of life."
- **David Moore**, product designer and founder of Zero-Nine Design and lecturer at Stanford's Graduate School of Engineering. Everyone is creative as a child because they can see something that isn't there. But as people become older and worry about fitting in, they suppress their creativity. Leading others to create ideas requires optimism, focus, collaboration, story-telling, and being able to block out the rest of the world. It requires shifting from a mindset of "It can't be done" to "It can be done."
- **Dr. Terry Paulson**, professional speaker and author of Making Change Work, who talked about the challenges of innovating and making personal and organizational change. He emphasized that change comes first from within, that optimism comes from a track record of overcoming obstacles, and that not enough time in organizations is spent talking about and learning from mistakes. He encouraged focus, repeatedly asking questions, and quoted Wayne Gretsky, who said, "You miss 100% of the shots you never take."

"So many have gotten so good at putting out fires, we have forgotten how to light them."

— David Moore



BullsEye Resources is excited to partner with Robert Tucker and The Innovation Resource to provide this executive summary capturing key insights from the Elite Retreat.

BullsEye helps conference organizers capture the critical content from their events. We distill this content into concise summaries that reinforce key messages and that can be distributed to those who couldn't attend, expanding the reach of an event and increasing its value.

BullsEye works with companies such as UPS, Coca-Cola, Aetna, McKesson, US Foods, and the Cheesecake Factory; and associations including ASAE, SHRM, ACE, ISTE, EDUCAUSE, and many more. BullsEye has summarized conferences for Harvard, Yale, Brandeis, Dartmouth, and other leading universities, as well as for nonprofit and government organizations.

To learn more about BullsEye visit [www.bullseyeresources.com](http://www.bullseyeresources.com).





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