



# EXECUTIVE ENGAGEMENT SPOTLIGHT

IMPACT.<sup>XM</sup>

# Executive Engagements 101:

## What you need to know

Effective executive engagements are pivotal for driving organizational success, yet they come with a unique set of challenges. Thoughtful planning, top-tier execution, and relevant measurements are integral to fostering meaningful connections with executive audiences to drive business outcomes and continuously improving executive marketing and brand strategies. Here, we'll define what an executive engagement is and why they are important for your experiential marketing strategy, along with identifying key pain points and potential solutions.

*Left: Executive Chris Woodley holds a wayfinding sign at Sailpoint Navigate, gathering other executives for a meeting*





## ✕ EXECUTIVE ENGAGEMENTS 101:

### What is an executive engagement?

At a fundamental level, executive engagements are all about having **conversations and building relationships with your stakeholders**. In the context of event and experiential marketing, executive engagements are dedicated experiences for brands to have focused, strategic conversations with their executive audiences. Typically, these are differentiated in some way from the standard event experience.

### Who is your executive audience?

Identifying the right executives for your engagement is key to delivering a quality experience. In totality, your audience is looking for intriguing, innovative solutions to their toughest challenges, and want to connect face-to-face with like-minded colleagues who can offer deep insights on unique solutions. As their time is valuable, you need to make sure the people in the room are strategically selected to provide significant incentive for them to attend.

***“If your own C-suite isn’t showing up, your customer’s C-Suites may not either...change your mindset on content and how to deliver it. This audience wants peer-to-peer ‘micro’ engagements, not big theater moments...”***

— Cate Hind, Senior Director, Global Events, Splunk

Make sure you do your homework beforehand: you should know your



An executive audience at the 2024 Experiential Marketing Summit

potential invitee’s business priorities, work background, and personal interests before putting them on your list. Once you have a list, cross-reference to see where there’s overlap to inform your event strategy and ensure you’ve invited the right mix of executives to experience it.



## ✕ EXECUTIVE ENGAGEMENTS 101:

### Where do executive engagements happen?

Executive engagements can exist in a variety of settings, depending on the strategic needs of your brand. Proprietary events, trade show exhibits, and permanent or semi-permanent environments like executive briefing centers and even road shows are all viable ways to connect with your executive audience.

**Proprietary Events** give brands **complete ownership over the entire experience**, as your event is single-sponsored and focused only on your brand. As such, you have the ability to create a highly customized and creative experience that highlights the strengths of your offering.

**Trade Shows** provide an opportunity to **offer exclusive access to the brand experience and content in a controlled setting**, with agendas and guest lists specifically tailored to draw business leaders and involve them in deep, meaningful conversations. Consider an exclusive invitation-only event aligned with potential initiatives and values that might spark interest, and that they can ONLY get at this event.

**Permanent/Semi-Permanent Environments** allow you to create interesting and inventive brand displays in your own facility. These environments are ideal for showcasing large-scale products and distilling complex processes that cannot travel easily between events. While an executive briefing center space is a long-term investment, you can partially offset the expense by offering the space for co-working during off hours.



Left: Sailpoint Navigate, a proprietary event held by Sailpoint for Customers and Executives





## × EXECUTIVE ENGAGEMENTS 101

### When is the right time for an executive engagement?

Finding the right moments and places to engage are essential. You can augment your existing trade show or event presence with special, invite-only events for executives, create a conversation space within a larger industry conference where your target audience will already be in attendance, or design an in-house or proprietary event. The idea is to **meet your executive audience where they want to be**, or create a can't-miss opportunity to connect with other industry leaders, to increase their likelihood of engaging with your key stakeholders.

*“The demo booth is our shopfront, but the meetings are where the true business happens. Budgets are scrutinized, bosses are looking for evidence of smart ‘rationalizing’ of what we’re spending where, and customer C-Suite experiences offer disproportionate profile, influence, and onward opportunity that halo right across the business.”*

— Cate Hind, Senior Director, Global Events, Splunk



Left: Hanwha Vision Private Executive Suite



## ✕ EXECUTIVE ENGAGEMENTS 101:



Top: Hisense Private Media Event

### Why are executive engagements important?

Executive engagements allow you to provide an elevated experience in a controlled environment to foster rich discussion between your brand and executive clients. According to a recent Forbes survey, **85% of C-suite decisions are influenced by peer conversations**<sup>1</sup>. Offering an opportunity to meet with leadership on a peer level gives your team the ability to deliver your brand's story in a way that is not perceived as a hard sell or product pitch. That's why it's important to send your best thought leaders, speakers, and C-suite representatives to any executive engagement event. In this way, you can showcase not only your products and services, but the skill of the



*"They absolutely don't want to be 'sold to'. It's more about 'hosting' than 'boasting'; with intimate peer moments over plenary sessions. We think carefully about the plenary and demo spaces versus intimate peer moments and networking spaces."*

— Kate Fulford-Brown, Managing Director, L2K

The flexibility and focus of an executive engagement experience allows your messaging to evolve over time as you gain more insights into your audience's pain points. By addressing them in relevant, solutions-oriented ways, you can differentiate your organization from your competitors while providing a premium experience that compliments your trade show and event strategies and is specifically targeted to a particular industry vertical.

1. Fact 19: <https://digitaldefynd.com/IQ/interesting-c-suite-facts-and-statistics/>



## ✕ CHALLENGES AND OPPORTUNITIES

### Challenge #1: Proving the Value

Deciding to host an executive engagement? It goes without saying that budget, time and physical real estate—whether within an event or a corporate office—is a typical challenge from any perspective. If you are wondering why you should invest in executive engagements, there are some questions to ask yourself first:

1. **What is your compelling ‘why’ and unique story to share with this audience?**
2. **What do you feel is missing from your current event program that addresses your executive audience?**
3. **Which KPIs can you drive proactively to support of the engagement?**
4. **Is there an opportunity to differentiate your brand through strategic executive engagements?**
5. **Will engagements with C-Suite contacts actually push you closer to your brand goals?**



Right: Hisense Private Media Event



How you engage is up to you: **your budget will help determine the scale of your overall investment.** You have to determine whether you can afford the long-term investment of an executive briefing center in your facility, or whether it makes more financial sense to dedicate a small multi-purpose space in your trade show booth. You also need to be sure you're making data-driven decisions based on analyses and your own business goals.

## Opportunity: Define data + measurement goals

Before you start an executive engagement plan, know what you want to get out of it at the end. **Define strategic objectives that clearly outline what you intend the engagement to accomplish**, such as fostering strategic discussions, showcasing your brand values, or generating leads. Perform an audience analysis to identify which key executives you should engage with, and do the background research necessary to understand their pain points and unmet needs. Then, cross-match your list to ensure that your event comprises quality attendees with similar backgrounds and business objectives.

*Right and Bottom: Hisense Private Media Event*





## ✕ CHALLENGES AND OPPORTUNITIES

### Challenge #2: Presenting your brand differently and authentically



Executives are a rarified group and hard to reach. They're not typically walking a convention floor or browsing through trade show exhibits. To appeal to an executive audience, you need to **immerse yourself in their business challenges**, provide strategic content that aligns with those challenges, and provide opportunities for them to connect with peers in constructive ways. So much of the executive engagement strategy comes down to pre-planning and research to fine-tune any interaction—you must know not only their company, but their back story and interests. To truly engage with executives, one must honor their time, exceed their expectations, and provide value to make attending your event worth their while.

Top and Right: C3.AI Transform 2023 Event

## Opportunity: Know your audience

Identify the most important executives for you to engage with and understand what they want most. You don't need to address a plethora of business issues—focus on the top three or five. Then build out a strategy to address those priority needs and challenges in the near term. While you're at it, do a little research on them personally to see what they're all about.

While your intent is serious, your approach doesn't necessarily have to be. Knowing your audience's personality, interests, and likes/dislikes can help you make your engagement fun. For example, an invitation-only cricket event for British enthusiasts may be more entertaining and enticing than the typical golf outing. Remember that the **C-suite world can be a lonely space**, and engaging with them on a human level may give them a chance to relax and recharge in a comfortable environment that also provides the opportunity to interact with compelling content presented in meaningful and interesting ways.





## ✕ CHALLENGES AND OPPORTUNITIES

### Challenge #3: Elevating the executive experience



A typical interaction that anyone can have at an expo or convention simply will not do. Executives need to be convinced that an experience is going to be worth it in order to take time away from the office. Any executive engagement plan should be **tailored to making the most of an executive's time** with relevant, compelling, and unique presentations and experiences. You also need to consider quality—an **engagement must be top-notch**, include peer-level attendees, and produce opportunities to address real business needs, or you will not be able to pique their interest enough to attend.

Top and Right: Sunbelt Rentals' Powerhouse 2024 event in Atlanta





## ✕ CHALLENGES AND OPPORTUNITIES

Opportunity: Present the right information, in the right place, at the right time



### Venue Selection

Choose a venue conducive to executive discussions. It can be an offsite excursion that encourages conversation and relationship building, a more formal dinner, or a sporting event. The goal is to **create a comfortable, exclusive environment** where new industry trends and information can be shared openly.



### Agenda Development

Craft a well-organized agenda tailored to executives' interests and schedules. Be sure to highlight intriguing, surprising, and useful ideas that address their specific business challenges. Executives value the opinions and insights of those they consider peers, so be sure to choose thought-provoking speakers with industry credibility.



### Partnering/ Collaboration

Collaborate with key, high-value participants to enhance the experience and offer unique insights. Co-creation means investing time up front to test, shape, and vet the topic agenda, content, speakers, etc. Importantly, **co-creation results in a sense of ownership**, with participants more likely to advocate for your event with peers, increasing its value.



### Personalized Outreach

Extend personalized invitations to key executives, highlighting the value of participation. More than **60% of executives decide to attend an event based on how personalized the invite and communications are**<sup>1</sup>.



### Seamless Logistics

Ensure smooth logistics, from registration to on-site support, to provide a hassle-free experience. Doing so **underscores your respect for their time and recognition** that they are making time for you.

<sup>1</sup> - <https://www.eventcombo.com/a/917/6-key-strategies-for-managing-c-suite-attendee-expectations>



## ✕ CHALLENGES AND OPPORTUNITIES

### Challenge #4: Scalability



Geography can be a challenge, but today's digital technology brings together even the most far-flung executives. With careful planning and execution strategies, you can deliver an extraordinary executive engagement experience wherever you (or they) are. From a logistical standpoint, start with the basics: **are you bringing your audience to you** for an in-house or proprietary event? Or **are you going to them** via a trade show or road show? What cultural considerations do you need to take into account for global and regional clients? What is the physical position of the executive team of interest? Most importantly, how are you facilitating executive connections and involvement with your brand?

Top and Right: Dell Technologies Tour made over 75 stops in North America and Canada 2023  
<https://www.dell.com/en-ca/dt/events/delltechnologiestour.htm>





## Opportunity: Omnichannel Program

**Omni-Channel:** Customize and streamline your brand story to be as concise and compelling as possible. For extra flexibility, use a cross-channel, cross-regional approach/strategy as needed so your brand is relevant and solutions-focused to your audience's specific need.

**Mobile Events & Exhibits:** Consider a mobile version of executive engagements. with modular-first design, and you have the flexibility to **create a uniquely tailored narrative in practically any location or communication channel** available. Modularity allows for an innovative roadshow targeted to your executive audience.

**Large Scale Product, Equipment, Process:** Virtual and/or augmented reality technology allows you to take your brand and product(s) to your audience in real time, compared with bringing your audience in-house to you. Digital experiences are **adaptable and scalable** so you can create everything from a fully immersive experience to small-scale environmental overlays that enhance a comfortable and welcoming environment. Either way, be sure your technology is both seamless and flawless, providing **a 'wow factor' that goes beyond the typical expected presentation.**



Left: A private executive tour for the Chiquita Explorer launch event

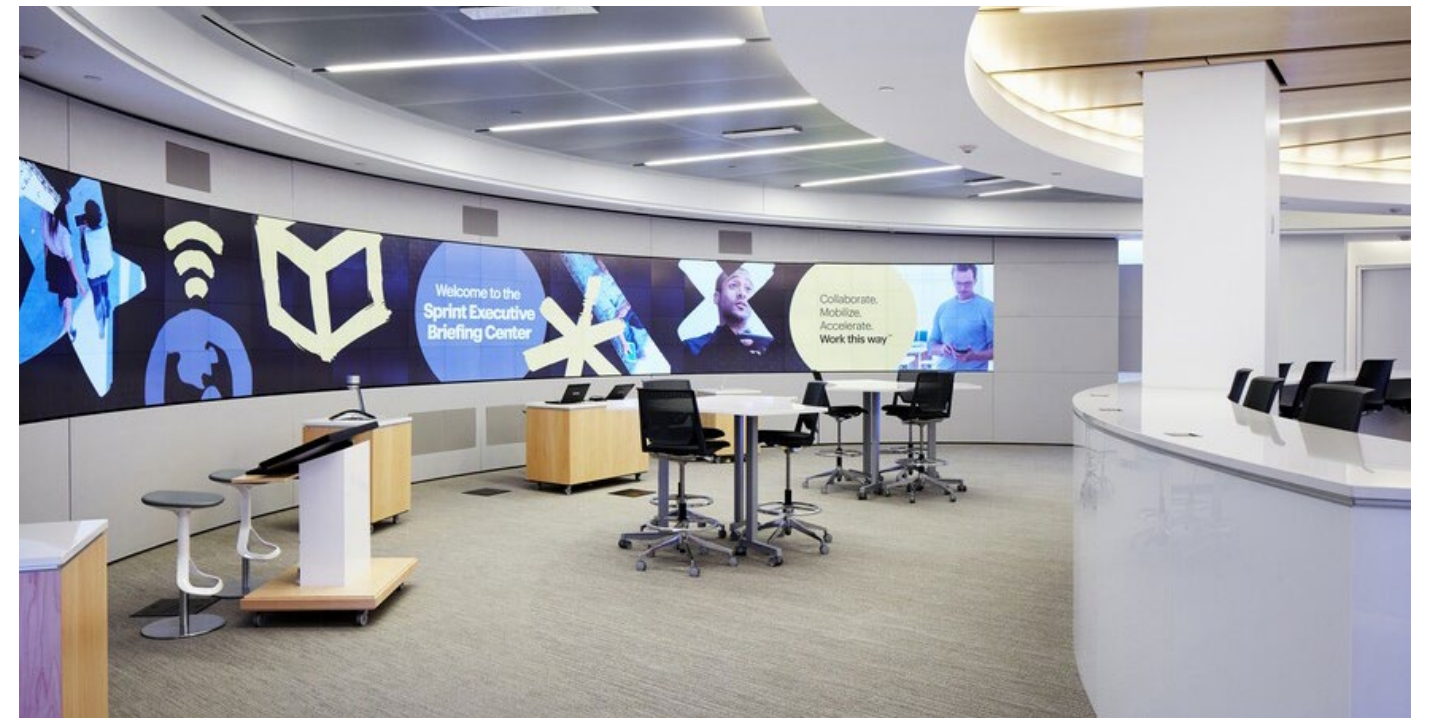


## ✕ CHALLENGES AND OPPORTUNITIES

### Challenge #5: Measuring success

Success starts with strategy at the inception of the project. Develop a clear objective, research your potential key executives, and decide on your KPIs before you implement any kind of executive engagement outreach. **Your data-driven goal will be the guideline for how you measure your unique success** with this audience. Note that success isn't always measured in leads: executives can push projects along faster, make decisions more independently, and provide you with insights that can further your business objectives as well as theirs.

During and after your executive engagement, ask for feedback. This will allow you to continuously improve your engagement initiatives and result in stronger showings in the future. A feedback analysis will help you identify strengths and areas for improvement, as well as offering insights on how to refine the experience to ensure ongoing success and value delivery moving forward.



Right: Sprint Executive Briefing Center in Overland Park, KS  
<https://www.architectmagazine.com/project-gallery/sprint-executive-briefing-center>





## ✕ CONCLUSION

Executives are one of the most highly sought-after, elusive groups for brand engagement. Knowing the industry and your audience is key to persuading these time-strapped, high-level people to attend and participate in your event. Attracting and retaining C-suite loyalty to you is paramount to achieving business goals, and there are no shortcuts. Understanding the intricate workings and dynamics of the C-suite is vital to creating relevant, compelling, “must-do” engagements. When time and money outweigh the value you bring, you’ll find yourself being rebuffed time and again. Those who thoughtfully combine clear strategic objectives with relevant metrics and intriguing, unique, cutting-edge ideas are more likely to succeed with this important audience.



## ✕ ABOUT THE AUTHORS



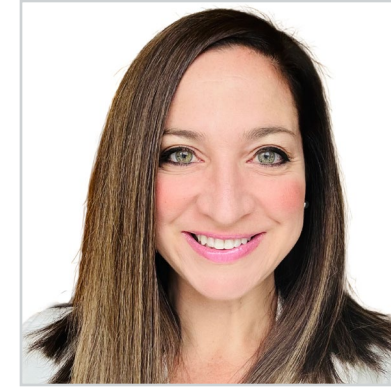
**James C Morris**  
**Executive VP, Growth**

As Impact XM's EVP of Growth, James is responsible for growing, maintaining, and enhancing the strength of Impact's client base, overseeing business development and client services activities and functions. James has over 15 years of experience in the event channel across a diverse range of roles, including digital, business development, customer relationship management, project management, and consulting services. James leads the dynamic client service and account support team, ensuring successful client engagements worldwide. He partners with brands to develop strategies for successful experiential engagements. James is a frequent speaker, focusing on human behaviorism, big data and analytics and holds a BA in Political Science, a Masters in International Business Administration, and a Law Degree.



**Robynne Weaver, CMP**  
**VP, New Business, Events**

Robynne is an experiential marketing leader with 20+ years of experience in citywide conventions and large-scale event management. Robynne understands the power of brand experiences to create impactful outcomes and achieve her clients' goals. Her Masters in Transformative Leadership and experience as a coach and workshop facilitator have given her a deep understanding of the complexities of organizational change and the importance of conscious leadership. Robynne has been an active member of MPI, PCMA and CEMA for many years and has held various chair and board roles. Her deep commitment to her clients and the industry at large has earned her a reputation as a trusted partner to countless brands.



**Dana McDonald**  
**Sr. Director, New Business Development**

Dana brings over 14+ years of experience within project and sales management- having held a variety of roles over the course of her time within the experiential industry in both account and sales leadership. Her passion is in prospecting and developing new client relationships and will be responsible for opening new doors of business with the New Business Development Department.





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Contact us:  
[experience@impact-xm.com](mailto:experience@impact-xm.com)