

Event Technology Selection Guide

How to Choose the Right Event Management Platform for 300% ROI

Your 7-Step Framework for Evaluating Event Technology That Integrates with Your Revenue Stack

Executive Summary

Only 23% of B2B companies use event management software, yet those who do achieve significantly higher ROI. This guide helps you evaluate platforms based on what actually matters: integration with your CRM, attribution tracking, and year-round engagement capabilities.

Time to Complete Selection: 2-3 weeks

Typical Implementation: 4-6 weeks

Expected ROI Improvement: 200-300%

Part 1: Define Your Requirements

Step 1: Identify Your Event Portfolio

Question: What types of events will you manage?

- ☐ Large conferences (500+ attendees)
- ☐ Small hosted events (10-50 attendees)
- ☐ Virtual webinars
- ☐ Hybrid events
- ☐ Trade shows and exhibitions
- ☐ Customer summits
- ☐ User conferences
- ☐ Executive roundtables

Why it matters: Different platforms excel at different event types. Some are built for massive conferences, others for intimate gatherings.

Step 2: Map Your Current Tech Stack

Your CRM System:

- ☐ Salesforce
- ☐ HubSpot
- ☐ Microsoft Dynamics
- ☐ Other: _____

Your Marketing Automation:

- ☐ Marketo

- ☐ Pardot
- ☐ HubSpot
- ☐ Eloqua
- ☐ Other: _____

Your Analytics Tools:

- ☐ Google Analytics
- ☐ Tableau
- ☐ Looker
- ☐ Power BI
- ☐ Other: _____

Why it matters: Integration quality determines whether you can actually track ROI. Native integrations are 10x better than third-party connectors.

Step 3: Define Success Metrics

What must you measure?

Primary Metrics:

- ☐ Pipeline influenced by event
- ☐ Revenue attributed to event attendees
- ☐ Cost per qualified lead
- ☐ Meeting conversion rate
- ☐ Content engagement scores
- ☐ Customer expansion opportunities

Secondary Metrics:

- ☐ Attendee satisfaction (NPS)
- ☐ Session attendance rates
- ☐ App engagement time
- ☐ Social media reach
- ☐ Lead velocity

Why it matters: If the platform can't track what matters to your business, it's the wrong platform.

Part 2: Evaluation Framework

Core Capabilities Scorecard

Rate each platform on a scale of 1-10 for these critical features:

Registration & Data Capture

Features to Evaluate:

- ☐ Customizable registration forms
- ☐ Conditional logic for dynamic forms
- ☐ Payment processing integration
- ☐ Group registration capabilities
- ☐ Waitlist management
- ☐ Discount codes and promotional pricing
- ☐ GDPR and privacy compliance

Questions to Ask:

- Can I capture custom fields that map to my CRM?
- Does registration data flow automatically to my CRM?
- How quickly does data sync (real-time vs. batch)?
- Can I require certain fields based on attendee type?

Score: ____/10

CRM Integration

Critical Requirements:

- ☐ Native integration with your CRM (not third-party)
- ☐ Bidirectional data sync (event → CRM, CRM → event)
- ☐ Automatic contact creation and update
- ☐ Campaign attribution tracking
- ☐ Opportunity influence tracking
- ☐ Real-time data flow (not batch processing)

Questions to Ask:

- What data fields sync between platforms?
- Can I track event influence on existing opportunities?
- How do I attribute closed deals to specific events?
- Is there a lag time in data sync?
- What happens if duplicate contacts exist?

Score: ____/10



CRITICAL: If this scores below 8/10, eliminate this platform. Integration is non-negotiable.

Mobile Experience

Features to Evaluate:

- ☐ Native mobile app (iOS and Android)

- ☐ Offline functionality
- ☐ Attendee profiles and networking
- ☐ Meeting scheduling
- ☐ QR code lead capture
- ☐ Push notifications
- ☐ Live feed and engagement
- ☐ Session check-in

Questions to Ask:

- Can attendees access content offline?
- How intuitive is the meeting scheduling?
- What happens if connectivity is spotty?
- Can I customize branding in the app?

Score: ____/10

Engagement Tools

Features to Evaluate:

- ☐ Live polling and Q&A
- ☐ Social feed with photos/videos
- ☐ Gamification and competitions
- ☐ Attendee matchmaking
- ☐ Meeting scheduler with calendar integration
- ☐ Resource library and downloads
- ☐ Surveys and feedback forms

Questions to Ask:

- How do engagement metrics feed into lead scoring?
- Can I segment audiences for targeted messaging?
- What behavioral data is captured automatically?
- How does engagement data connect to CRM records?

Score: ____/10

Content Management

Features to Evaluate:

- ☐ Session recordings and on-demand access
- ☐ Resource library organization
- ☐ Document sharing and downloads

- ☐ Video hosting or integration
- ☐ Searchable content repository
- ☐ Content access controls
- ☐ Analytics on content consumption

Questions to Ask:

- Can content be restricted to certain attendee types?
- How long is content available post-event?
- What storage limits exist?
- Can I track who downloaded what?

Score: ____/10

Analytics & Reporting

Features to Evaluate:

- ☐ Real-time engagement dashboards
- ☐ Custom report builder
- ☐ Export capabilities (CSV, PDF)
- ☐ Pipeline influence tracking
- ☐ Revenue attribution reporting
- ☐ Session attendance analytics
- ☐ Lead scoring capabilities
- ☐ Behavioral tracking

Questions to Ask:

- Can I build custom dashboards for executives?
- What's the lag time on data updates?
- Can I export data to our BI tool?
- How granular is the behavioral tracking?
- Can I see individual attendee journeys?

Score: ____/10

 **TARGET:** Platforms should score 8+ on Analytics or they can't prove ROI.

Virtual & Hybrid Capabilities

Features to Evaluate:

- ☐ Live streaming integration
- ☐ Breakout rooms

- ☐ Virtual networking
- ☐ Chat and messaging
- ☐ Screen sharing and presentations
- ☐ Recording and replay
- ☐ Virtual booth experiences
- ☐ Seamless in-person + virtual experience

Questions to Ask:

- How many concurrent virtual attendees supported?
- What's the quality of video streaming?
- Can virtual and in-person attendees network together?
- Are virtual engagement metrics captured?

Score: ____/10

Note: Score this section only if you plan virtual/hybrid events.

Customer Support & Services

Features to Evaluate:

- ☐ Dedicated customer success manager
- ☐ 24/7 technical support
- ☐ Implementation assistance
- ☐ Training and onboarding
- ☐ Help documentation and resources
- ☐ Response time SLAs
- ☐ Onsite support availability

Questions to Ask:

- What's included in standard support vs. premium?
- Average response time for critical issues?
- Do you offer onsite support during events?
- What training is provided for our team?

Score: ____/10

Part 3: Platform Comparison Matrix

Top Event Management Platforms

Use this matrix to compare your shortlisted platforms:

Feature	Event Cadence	Bizzabo	Cvent	Hopin	Your Platform
CRM Integration	Native SF/HS	Native SF/HS	Native SF	Limited	
Price Range	\$\$\$	\$\$\$	\$\$\$\$	\$	
Best For	Life Sciences, Enterprise	B2B Conferences	Large Enterprise	Virtual-First	
Mobile App	★★★★★	★★★★★	★★★★	★★★	
Ease of Use	★★★★★	★★★★	★★★	★★★★	
Analytics	★★★★★	★★★★★	★★★★	★★★	
Virtual/Hybrid	★★★★	★★★★	★★★	★★★★★	
Customization	★★★★★	★★★★	★★★★★	★★★	
Support	★★★★★	★★★★	★★★★	★★★	

Legend:

- ★★★★★ = Excellent
- ★★★★ = Very Good
- ★★★ = Good
- ★★ = Fair

Part 4: The Decision Matrix

Weighted Scoring Model

Assign importance weights based on your priorities:

Feature Category	Your Weight (%)	Platform A Score	Platform B Score	Platform C Score
CRM Integration	___%	___/10	___/10	___/10
Mobile Experience	___%	___/10	___/10	___/10
Engagement Tools	___%	___/10	___/10	___/10
Analytics & Reporting	___%	___/10	___/10	___/10
Content Management	___%	___/10	___/10	___/10
Virtual/Hybrid	___%	___/10	___/10	___/10
Support & Services	___%	___/10	___/10	___/10
Ease of Use	___%	___/10	___/10	___/10
TOTAL	100%	___	___	___

Calculation: (Weight % × Score) for each category, sum all categories

Winner: Platform with highest total score

Part 5: Critical Questions for Vendor Demos

Before the Demo

Send these questions in advance:

1. How does your platform integrate with [YOUR CRM]? Can you show us the data flow?
2. Walk us through the attendee journey from registration to post-event nurture
3. Demonstrate how you track pipeline influence and revenue attribution
4. Show us a real customer's analytics dashboard
5. What's your implementation timeline and what resources do we need?

During the Demo

Data & Integration:

- ☐ Show me how registration data flows to our CRM
- ☐ How do we track which opportunities were influenced by the event?
- ☐ What happens when a registrant is already in our CRM?
- ☐ Can we segment audiences based on CRM data?
- ☐ How do we attribute revenue to specific events?

User Experience:

- ☐ Let me try scheduling a meeting as an attendee
- ☐ Show me how networking matches work
- ☐ Walk me through the mobile app experience
- ☐ How do attendees find and download content?
- ☐ What does the engagement feed look like?

Administration:

- ☐ How long does it take to build out an event?
- ☐ What customization options exist for branding?
- ☐ Show me how to send targeted communications
- ☐ How do we manage speaker submissions?
- ☐ What reports can we access in real-time during the event?

Technical:

- ☐ What's your uptime SLA?
- ☐ How do you handle traffic spikes?
- ☐ What security certifications do you have?
- ☐ Where is data stored and backed up?
- ☐ What's your disaster recovery plan?

After the Demo

Reference Check Questions:

Call 2-3 current customers:

1. What surprised you most about implementation?
 2. How responsive is support when issues arise?
 3. What's one thing you wish you'd known before signing?
 4. How has the platform impacted your event ROI?
 5. What features do you not use that were promised?
 6. Would you choose this platform again? Why or why not?
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Part 6: Pricing Evaluation

Cost Components Checklist

Base Platform Fees:

- ☐ Annual license fee: \$_____
- ☐ Per-event fee: \$_____
- ☐ Per-attendee fee: \$_____
- ☐ Per-user fee (admins): \$_____

Add-On Costs:

- ☐ Premium integrations: \$_____
- ☐ Custom branding: \$_____
- ☐ Additional storage: \$_____
- ☐ Advanced analytics: \$_____
- ☐ Onsite support: \$_____
- ☐ Training sessions: \$_____

Hidden Costs to Ask About:

- ☐ Implementation fees
- ☐ Data migration costs
- ☐ Premium support upgrades
- ☐ API access fees
- ☐ White-labeling charges
- ☐ Overage fees for attendees

Total First Year Cost: \$_____

Total Ongoing Annual Cost: \$_____

ROI Calculation

Current Event Costs Without Platform:

- Average cost per event: \$_____
- Number of events per year: _____
- Total annual event spend: \$_____
- Current average ROI: _____%

Projected Costs With Platform:

- Platform annual fee: \$_____
- Expected cost per event: \$_____
- Number of events per year: _____
- Total annual event spend: \$_____

Expected Improvements:

- Projected ROI increase: _____% → _____%
- Additional pipeline generated: \$_____
- Time saved (hours per event): _____
- Improved lead conversion rate: _____% → _____%

Payback Period: _____ months

Part 7: Implementation Checklist

Once you've selected your platform:

Week 1-2: Foundation

- ☐ Kick-off call with implementation team
- ☐ Define admin users and permissions
- ☐ Map CRM fields to platform fields
- ☐ Configure integration settings
- ☐ Import historical attendee data
- ☐ Set up SSO if applicable

Week 3-4: Configuration

- ☐ Build event templates
- ☐ Configure registration forms
- ☐ Set up email templates
- ☐ Design mobile app branding

- ☐ Configure reporting dashboards
- ☐ Test CRM data flow

Week 5-6: Testing & Training

- ☐ Conduct end-to-end testing
- ☐ Train admin team
- ☐ Train event coordinators
- ☐ Train sales team on lead follow-up
- ☐ Document processes and procedures
- ☐ Create internal help resources

Week 7-8: Launch

- ☐ Build first event in platform
 - ☐ Soft launch with internal users
 - ☐ Gather feedback and refine
 - ☐ Full launch with external attendees
 - ☐ Monitor closely and support team
 - ☐ Conduct post-event debrief
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Part 8: Red Flags to Watch For

Deal-Breakers

Walk away if:

- ☐ No native CRM integration (only third-party)
- ☐ Data sync is batch-only (not real-time)
- ☐ Cannot track opportunity influence
- ☐ No mobile app or very limited functionality
- ☐ Poor customer reviews (below 4.0 stars)
- ☐ Vendor is evasive about pricing
- ☐ Implementation timeline exceeds 12 weeks
- ☐ No data export capabilities
- ☐ Limited or no API access
- ☐ Vendor cannot provide customer references

Warning Signs

Investigate further if:

- ☐ High customer churn rate
- ☐ Recent significant price increases
- ☐ Major features require add-on costs
- ☐ Limited integration with your marketing automation

- ☐ Long average support response times
 - ☐ No dedicated customer success manager
 - ☐ Platform seems overly complex for your needs
 - ☐ Company has been acquired recently
 - ☐ Lack of product innovation/updates
 - ☐ References give lukewarm endorsements
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Part 9: Your Final Decision Checklist

Before signing the contract, confirm:

Strategic Fit:

- ☐ Platform aligns with our event portfolio
- ☐ Scales with our growth plans
- ☐ Supports our revenue goals
- ☐ Integrates with our tech stack

Financial:

- ☐ Total cost fits our budget
- ☐ ROI projection is realistic
- ☐ Contract terms are favorable
- ☐ No surprise costs discovered

Technical:

- ☐ Integration tested successfully
- ☐ Security requirements met
- ☐ Performance standards acceptable
- ☐ Implementation timeline works

Operational:

- ☐ Team is trained and ready
- ☐ Support model meets our needs
- ☐ Documentation is comprehensive
- ☐ Success metrics defined

Risk Mitigation:

- ☐ References checked out positively
 - ☐ Exit strategy and data portability confirmed
 - ☐ SLAs are acceptable
 - ☐ Contract has reasonable termination clause
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Recommended Platform: Event Cadence

Why Event Cadence is ideal for B2B tech companies:

- ✓ **Native Salesforce & HubSpot Integration** - Real-time bidirectional sync
- ✓ **Purpose-Built for B2B** - Not retrofitted from consumer events
- ✓ **Year-Round Engagement** - Not just event logistics
- ✓ **Proven at Fortune 500 Scale** - Merck, Intel, Sony, MIT
- ✓ **Healthcare & Life Sciences Expertise** - Specialized compliance features
- ✓ **Award-Winning Platform** - 2022 Eventex Gold Winner
- ✓ **Exceptional Support** - Dedicated customer success managers

Learn More: eventcadence.com

Next Steps

1. **Complete this evaluation** for your top 3 platforms
2. **Schedule demos** with your shortlist (2-3 platforms)
3. **Check references** from current customers
4. **Negotiate pricing** and contract terms
5. **Plan implementation** with internal team

Need Help Deciding?

Download our other resources:

- **300% ROI Event Planning Checklist**
- **Event ROI Calculator Template**
- **90-Day Event Transformation Checklist**

Or contact Sproutworth for personalized platform selection consulting.
