



PROCUREMENT
STRATEGY GROUP



EVENT FORENSICS™ CASE STUDY

This is how leadership understands
whether a conference is financially safe.



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Executive Summary



This case study address a critical gap between **conference execution** and **executive financial accountability**.

While conferences often represent one of the largest discretionary marketing and operating expenses, most organizations lack a clear, repeatable way to quantify financial risk, identify hidden losses, and apply lessons learned year over year.

As a result, leadership teams approve significant event budgets without the visibility required to manage them as strategic investments.

The Event Forensics™ tool exists to reframe conferences from a logistics-driven activity into a financially governed business function.



Context

Event Forensics™ delivers a forensic, data-backed breakdown of conference financial performance—in language leadership understands.

This tool explains:

- Where budget overruns originated
- Which contractual terms created financial exposure
- What savings opportunities were missed

Quantify Risk Before the Next Conference.

Attrition clauses, cancellation penalties, and under-negotiated concessions quietly introduce six- and seven-figure risks, yet these exposures are rarely quantified in advance.

Event Forensics™ identifies, monetizes, and mitigates these risks before contracts are signed again, not after losses occur.





The Challenge

Disconnected sourcing was leaving leverage and protection on the table

Global leader in HVAC industry hosts over 20 corporate events annually. The events vary, from annual SKO, national product roadshows to internal and external incentives for high performing teams and customers.

The event calendar was complex: multiple regional meetings, consecutive weekly timing, and a physical delivery schedule that had to stay coordinated from one location to the next. At the same time, inconsistent hotel brands reduced consolidated buying power, while standard clauses left the company vulnerable to significant penalties if business needs shifted.

The risk was not limited to a single meeting. It sat across the full portfolio. Without a holistic strategy, each event could solve one logistical problem while creating another financial or contractual exposure elsewhere.

Core Need:

Protect the company's bottom line while preserving flexibility for future meetings. That meant optimizing both meeting logistics and the legal-commercial terms inside each hotel contract.



Unquantified Financial Risk:

When attrition, cancellation, and contract clauses aren't looked at holistically and quantified in advance, organizations unknowingly expose themselves to six- and seven-figure liabilities that surface only after budgets are exceeded.

Lack of Identification of Hidden Losses:

Missed concessions, weak contract terms, and untracked variances quietly erode ROI, inflating total event cost without ever appearing as a single visible line item.

Fragmented Information:

When event data lives across spreadsheets, emails, and vendors, leadership loses the ability to analyze performance year over year, resulting in repeated mistakes and weakened negotiating power.

Brand Risk:

Financial missteps behind the scenes often translate into reduced production quality, sponsor dissatisfaction, or attendee experience failures that directly impact brand credibility and trust.

The Objective

Streamline meetings, improve protection, and create leverage

Streamline Regional Meetings:

Source hotels in four regions and sequence locations so truck delivery could arrive on time between weekly programs.

Improve Cancellation and Attrition Clauses:

Increase financial protection if cancellation or attrition provisions were triggered.

Build a Multi-Year Strategy:

Use brand consistency and market intelligence to strengthen future negotiating leverage.



The Result

Measurable savings, stronger contracts, and a future-ready meeting strategy

\$3.4M+

Savings Optimization

Total year-to-date savings across the engagement.

Future-proofed

Hotel Contracts

Revised attrition and cancellation clauses to better serve the client in a worst-case scenario.

Flexible

Leverage Preserved

A holistic approach optimized timing, locations, and supplier strategy for future scheduling.

Business Impact

The organization gained a clearer view of meeting spend and contract exposure across multiple events.

Hotel sourcing moved from event-by-event decisionmaking to a portfolio-level procurement strategy.

Contract language better accounted for disruption, attrition risk, and cancellation scenarios.

Future meetings can be scheduled with greater confidence, consistency, and negotiating power.



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Why Event Forensics™



It Quantifies Financial Risk Before It Becomes a Loss

Event Forensics™ translates attrition, cancellation, and contract exposure into real dollar amounts, allowing leadership to mitigate risk proactively instead of reacting after budgets are exceeded.

It Creates a Single Source of Truth for Executive Decision-Making

Event Forensics™ consolidates fragmented event data into one defensible, reusable financial artifact that supports budget planning, contract negotiations, and year-over-year performance analysis.

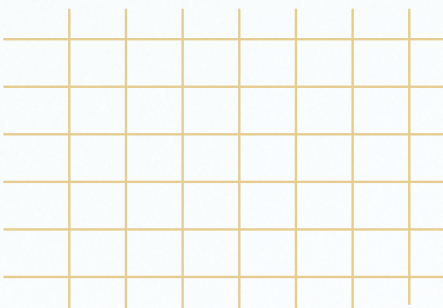


It Recovers Hidden Value Already Embedded in Your Events

By identifying missed concessions, underutilized contract terms, and untracked variances, Event Forensics™ surfaces savings that would otherwise remain invisible and unrecovered.

It Protects Brand Equity by Stabilizing the Event Experience

When financial exposure is controlled, organizations avoid last-minute cuts that compromise production quality, sponsor confidence, and attendee perception — safeguarding the brand as well as the balance sheet.





Our Operating Principles

Our values guide how we lead and execute when timelines are tight and expectations are high. Our principles ensure clarity, accountability, and consistent delivery under pressure.



Ownership

We step in fully and assume responsibility when execution risk is high.



Collaboration

We integrate seamlessly with internal teams, vendors, and leadership.



Precision

We focus on details that materially affect attendee experience and brand perception.



Execution Discipline

We prioritize clarity, structure, and follow-through under pressure.



Event Forensics™ At Work

Event Forensics™ applies a forensic, financial lens to conferences—analyzing contracts, budgets, and outcomes to reveal risk, recover hidden value, and inform smarter decisions for future events. It transforms scattered event data into a clear, executive-level financial narrative that leadership can use to plan, negotiate, and approve conferences with confidence.





Key Outcomes

Event Forensics™ is a strategic and holistic tool, and when paired with operational maturity of the events creates disciplined vendor management and procurement oversight. Clients see improved cost efficiency and reduced execution burden, allowing internal leadership to remain focused on strategic priorities.

Reduced Financial Exposure Across the Event Portfolio:

Financial stability, proactive approach and quantified visibility into risks.

Recovery of Hidden and Unrealized Value:

Recovers funds, identifies underutilized contract terms, prevents cost leakage.

Executive-Level Decision Intelligence:

All event financial data is consolidated into a single, standardized, reusable artifact designed for leadership review.

Institutional Learning and Year-Over-Year Improvement:

Event performance data is normalized across years, enabling trend analysis and identification of recurring risk drivers.



Get in Touch

We support organizations planning complex, high-impact events where budget, ROI and execution matters.

Contact us to start the conversation.



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Location

Serving the US & EU

