

How an Outsider's Lens  
Accelerates and Improves  
the Event **Transformation**  
Journey for NAFA Fleet  
Management Association

# About **NAFA**

- World's largest not-for-profit membership association for individuals who manage vehicular fleet and mobility for their employers.
- More than 2,000 fleet manager members employed by corporations, universities, government agencies, utilities, and other entities using vehicles to transport people or goods.
- More than 1,000 additional associate members in companies that support fleet managers.
- Members are responsible for the specification, acquisition, maintenance, repair, fueling, risk management, and remarketing of more than 4.6 million vehicles that drive an estimated 50 billion miles each year.

## **NAFA'S SIGNATURE EVENT: NAFA INSTITUTE & EXPO (I&E)**

- Largest show for fleet professionals, drawing more than 2,500 attendees from around the world
- Expo spans more than 60,000 sq. ft. with 250+ exhibiting companies
- More than 40 peer-led education sessions

## **The Challenges**

- After decades of strong growth, I&E attendance and revenues were declining.
- First-timer churn - The good news: 30% or more of attendees were first-timers. The bad news: Winning them back proved to be difficult.
- I&E had been running with the same event design playbook for more than a decade. Their industry was evolving, but their event wasn't keeping pace to win over NextGen guests, who crave more dynamic and interactive experiences.
- The need for event transformation was acknowledged, but opinions differed about which I&E elements to keep, add, modify, or remove.

## **The Champion**

NAFA hired Tina Mercardo, CEM, as Director for Meetings & Events in late 2015. Tina's strong event industry background and experience gleaned in working with other associations would be pivotal in helping to reverse the attendance and revenue backslides and get NAFA back on a healthier growth track.

Upon arrival, Tina immediately started interviewing others who were involved with I&E to get a better gauge on who's attending. Through these exchanges, she identified three primary attendee groups, each commanding about 30%, give or take, of total attendance:



- 1** The Loyalists – “If we went to Mars, they'd find a way to come to our show.”
- 2** The Samplers – “They might test the waters every few years.”
- 3** The First Timers – “We had solid performance as far as acquiring new attendees, but conversion rates for winning them back were low.”

Enter the Maritz

# Design Studio Team

Tina attended an experience design session at PCMA's Convening Leaders 2018, led by Greg Bogue, the Design Studio Chief Experience Architect. She was intrigued, as Greg touched on several event design strategies that aligned with challenges NAFA was striving to solve.

**AFTER A FOLLOW-UP DISCUSSION WITH GREG, TINA RECOMMENDED THE NAFA TEAM ENGAGE THE DESIGN STUDIO TEAM TO ASSIST THEM.**

## The Process

This event transformation initiative kicked off with a discovery call, facilitated by Tim Simpson, the Design Studio's Brand & Creative Engagement Strategist. Milestone moments across the entire I&E attendee journey were explored to identify event transformation objectives. Based on this discussion, a three-phase event transformation approach was recommended.

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I believe it's important to get an outsider's perspective on our show.

The Maritz Design Studio is a very knowledgeable sounding board that could validate and question changes we were considering. Change can be scary. Having a trusted advisor like Design Studio come in with no skin in the game and no bias – but wisdom from other events – would help us get braver in the changes we needed to make.”

**TINA MERCARDO, CEM | NAFA**



# Phase 1: **Insights**

The team determined that there was a gap in truly understanding the audience's preferences and value drivers. The following objectives were identified:

- Evaluate the success of I&E 2018
- Feed the attendee (and potential attendee) voice into future I&E design decisions.
- Identify roadblocks to attendance
- Identify current strengths and opportunities
- Gather preferences, ideas, and suggestions
- Better understand attendees (and potential attendees) as people

## TOP 3 ATTENDANCE ROADBLOCKS FOR NAFA:

**1** **Schedule Conflicts** – 46% for recently attended; 40% for never attended

**2** **Cost** – 37% for recently attended; 34% for never attended

**NOTE:** 67% of those who never attended had no budget to fund event attendance.

**3** **Company Restrictions** (beyond cost) – 14% for recently attended; 17% for never attended

Many more valuable insights were revealed during Phase 1, including one takeaway around event objectives. Past I&E attendees ranked Education as #1 (47%) and Networking as #2 (26%).

## METHODOLOGY:

Utilize web-based survey technology and live interviews targeting the 5,838 professionals (repeat attendees, 1st timers, never attended), 338 completed surveys that captured perceptions and preferences across dozens of different parameters, including role, years of experience, 2018 I&E satisfaction levels, plus nine different event personas.

### INSIGHTS

As event improvement discussions unfold at your organization, here's a post you might share with your leadership team to help them get up to speed on what matters today:

[How to Touch the Core of Your Audience to Design Better Event Experiences](#)

# Phase 2: **Diagnostics**

**An On-site PULSE was conducted by Dan Sundt, Design Studio Master Designer, who observed NAFA's 2018 Institute & Expo (I&E) in Anaheim, CA.**



While onsite, Dan inspected a wide range of event elements that shaped the attendee experience. Serving as the “big tent” industry experience, I&E continues to draw a wide cross-section of fleet professionals and exhibitors, with key metrics indicating an overall healthy event.

With that said, there were a few event categories where improvements were needed to advance I&E from contender to indispensable “must-attend” status.

“What we found was somewhat typical for a traditional association event,” said Dan. “It was well run and NAFA commanded a solid share of loyal attendees, but to engage and grow with their key audiences, they needed to radically transform the core of their event.”

**An On-site PULSE report was assembled by Dan, capturing observations and recommendations for the following categories:**

- Registration & Housing
- Event Logistics
- Learning Sessions
- General/Plenary Sessions
- Expo
- Evening Receptions & Activities
- Materials & Event App



**Preliminary findings from the On-site PULSE would set the stage for the next phase of this process, where the Design Studio and NAFA teams would convene and collaborate to create an event that...**

- Draws consistently higher attendance
- Delivers unprecedented value to all stakeholders
- Helps to keep NAFA on a strong and prosperous growth track

# Phase 3: **Design**

**With the research backdrop firmly established through work in Phases 1 and 2, a Design Lab followed.** Tim and Dan facilitated the Lab exchanges with a diverse group of NAFA stakeholders participating in these discussions.



**The Design Lab Mission:** Formulate a strategic framework from which to begin the process of redesigning the I&E.

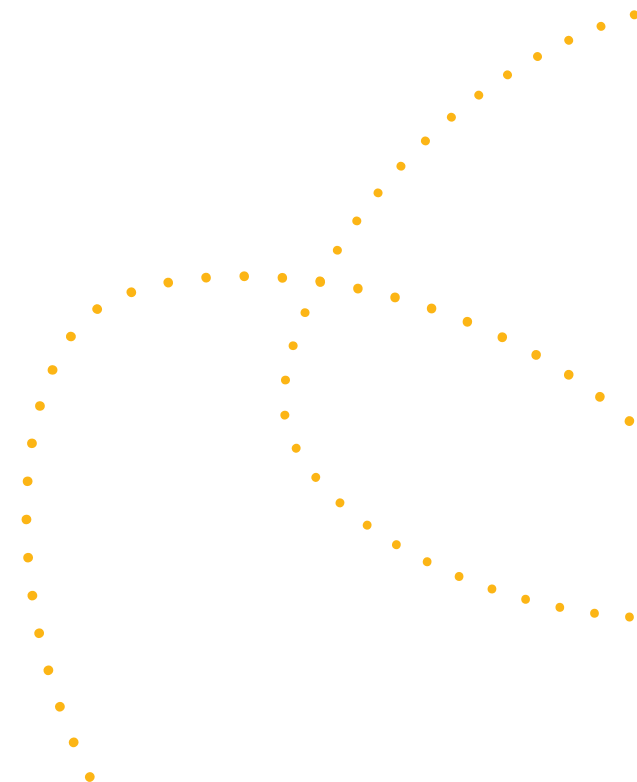
After the first two days of the Design Lab, Tina added one more request for the Design Studio and Lab participants to weigh in on. For the upcoming 2019 I&E in Louisville...

- What event elements should we cut?
- What elements should not be touched?
- What's missing?

The Design Studio and NAFA leadership team then came together for an additional day focused on ideation, prioritization and consensus building around the future state of the 2019 event.

## **PLOTTING EXPERIENCES ACROSS 8 EVENT PHASES**

A popular exercise that happens during the Design Lab is plotting various elements across The 8 Phases of a Successful Event – phases that occur before, during and after the live event. This often sparks some of the richest exchanges, as collectively, this group must also rank the value of each element.



## The First Event

# Transformation Cycle

While recommendations from the Design Lab would span multiple years, here's a glimpse at changes NAFA made for 2019 and what they learned:

### BEST TO BE TRANSPARENT ABOUT YOUR EVENT TRANSFORMATION PLANS

The I&E brand had grown weary, tipping in favor of what appealed to the more senior attendees. For 2019, the opening keynote speaker was a futurist, a harbinger of other changes to come. Tina added, "We started off by telling them, change is happening – for our industry and for this show. We all need to get on board."

### TRIM BACK THE EVENT DURATION AND END MORE POWERFULLY

For decades, I&E spanned four days, but in recent years, more attendees were dashing out early. According to Peak End Rule, the things people remember most are peak event experiences (often periods of intense joy) and how it ends. NAFA trimmed back the show duration from four days to three, thus boosting participation for the final day. Going a step further, they injected a few surprises, including a closing reception, to ensure more guests exited with emotional memories they would remember and savor. By investing more in the Exiting experience, NAFA was also sowing seeds to boost how many would return in 2020.

### TRIM BACK EDUCATION SESSION LENGTH AND BOOST AUDIENCE PARTICIPATION

Previously, education sessions ran two hours and younger attendees were often the first to leave early. For 2019, NAFA cut back session lengths to 60 minutes. They also coached speakers on ways to weave in more Q&A and audience interaction. Audience response systems were added – another big hit with attendees. "People are more apt to ask questions if they can do so anonymously. If you ask them to raise their hands, many won't bother." As for younger generations, Tina added, "Some viewed the audience response system like a video game – they loved it."

### DITCH THE GALA

For years, the I&E Gala was thought to be a treasured experience. Upon closer inspection, NAFA discovered that most were neutral about this pricey affair. NAFA decided to sunset the Gala and reinvest those budget dollars in experiences that mattered more. With the Gala being the time to recognize award winners, NAFA shifted this recognition to the morning education sessions, where these extra-mile innovators would also serve on panels. Guess what? The award winners appreciated this exposure more and so did the attendees. Budget dollars recouped from the Gala were also reinvested to add more punch to two receptions. All in all, NAFA's decision to remove the Gala was both brave and brilliant.

### DESIGN RICHER SPONSORSHIP EXPERIENCES

Before NAFA made the final decision to get rid of the Gala, Tina reached out to the sponsor who had been supporting this event for many years. "We didn't want to lose them, so I filled them in on the changes we were exploring," said Tina. "I shared that we wanted to engage their expertise and industry knowledge in better ways and proposed a few new ideas, including having them moderate a panel discussion. They were thrilled to be viewed as thought leaders – not just a logo on a sign."



# What's **NEXT?**

**NAFA's I&E 2020 will be in Indianapolis and there are many more ideas generated in the Design Lab that will be explored, refined, and activated at this next event.**

## **DESTINATION AS AN EXPERIENCE DRIVER**

Destination impacts the event experience, but Design Studio cautions that it should be explored later in the event design process. Tina added, "Our audience tends to prefer second tier cities, where they're the big fish in a smaller pond." Again, the Design Studio team is weighing in with destination recommendations that align with the larger and more strategic framework already established.

## **CONNECTING EVENT ELEMENTS TO BOOST ENGAGEMENT**

For 2019, there was a significant increase in participation for individual elements. "What we're looking at now is how to connect these. The general session was outstanding. The expo floor had more traffic and participation in education topped 60%, which was higher than previous years. But much like Disney, we want to connect each of these elements to anticipate what they'll want next and elevate the entire experience. As for participation, we like to get that up over 75%."

**Stay tuned – we'll be reporting back about the next exciting leg of NAFA's event transformation journey.**

## **CREATING SUCCESSFUL EVENTS THROUGH PEOPLE-CENTERED, SCIENCE-BASED DESIGN**

The Design Studio by Maritz is an agency that brings the strategic perspective of powerhouse consulting to the world of meetings, events and human-to-human experiences.

We leverage event design, experience strategy and behavioral science to help clients solve problems and drive greater results.

### **NEED MORE? LET'S CHAT!**

Let's discuss your challenges and see how we can assist you in designing a custom journey that leaves the right impression at every step of the way.

**[Schedule a free discovery call with a member of our team.](#)**