

The background is a complex, dark blue field of interlocking gears of various sizes. Overlaid on this are four professionals: a woman in a purple blazer holding a small ETS card, a man in a dark suit, another man in a blue suit gesturing, and a woman with glasses working on a laptop. A network of white dots connected by thin lines is scattered across the scene. In the center, a large circular frame contains a cluster of golden gears, with the ETS logo prominently displayed at the top.

COME TOGETHER

REIMAGINING ETS EVENT MARKETING AND MANAGEMENT FOR 2024 AND **BEYOND**

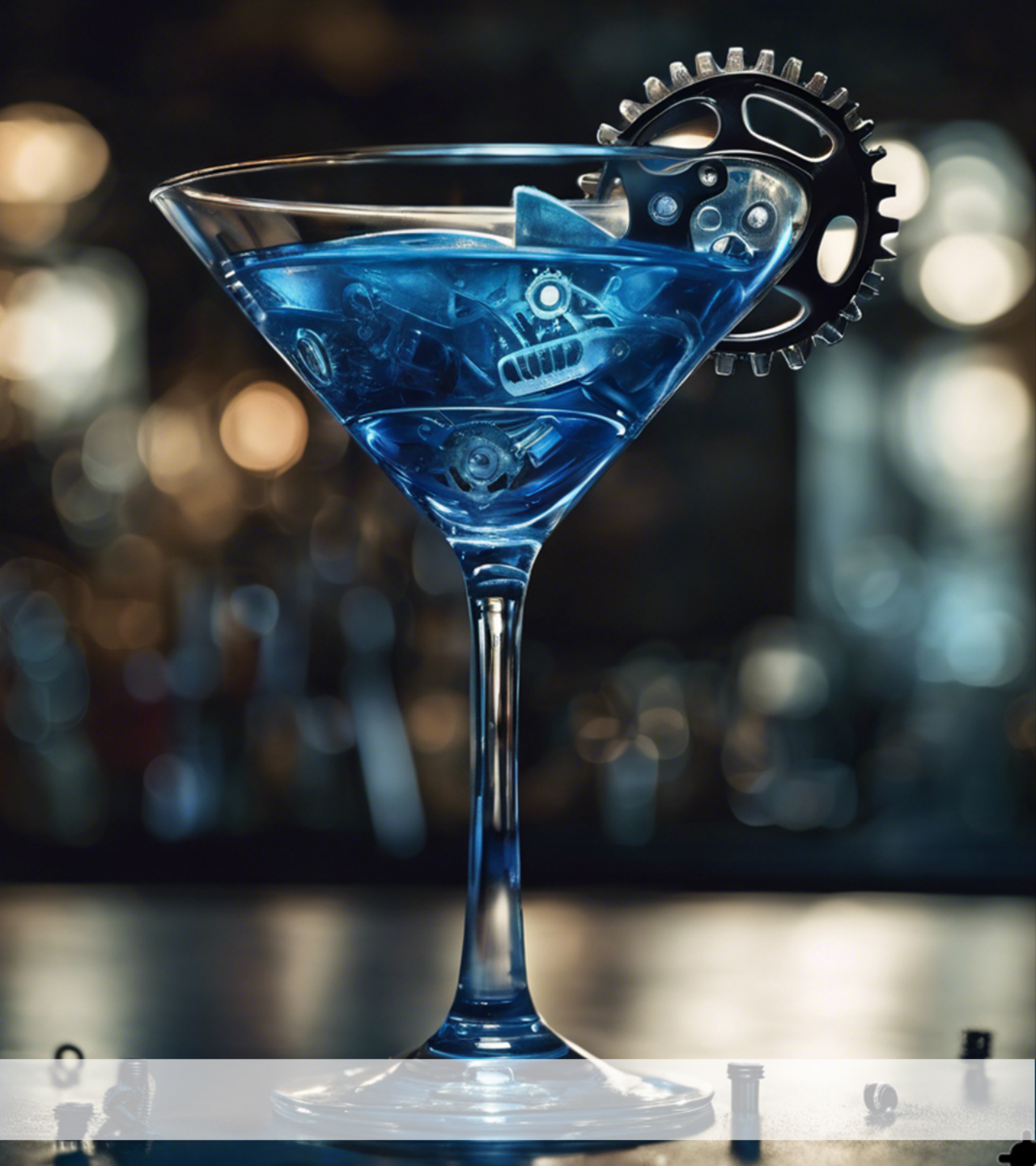


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OUR EVENT MARKETING CHALLENGES

A SYSTEM OF CONTROLLED CHAOS

Over the past three months I've had the chance to thoroughly observe how event marketing, materials handling and sponsorships are being managed internally. Below are what I see as our current challenges.

- **Log Jams In Communication and Flow of Information**
- **Budget Waste From Overpriced Vendors**
- **No Proper System For Internal/External Requests**
- **Staff Frustrated With Lack of Organization and Focus Within Events and Materials Handling.**
- **Lack of Cohesion Undermining Image & Quality Control**
- **No Standard of Quality For Event Participation or Production**

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KEY STRATEGIC OBJECTIVES AND PRIORITIES FOR 2024

TURNING CHALLENGES INTO OPPORTUNITIES



INTERNAL

- Reduce waste/missed opportunities by educating the organization on event marketing.
- Create an internal standard of quality for event marketing to define as a perpetual industry leader.
- Build bridges within the divisions to get stakeholders on board with new system and get ahead of potential event opportunities we may not know about
- Develop an efficient way to handle internal/external requests and vet opportunities.
- Create an internal ecosystem for events marketing that unifies all organizational stakeholders and streamlines efforts in a clear, user-friendly way.
- Re-organize and strengthen conference services and marketing/promo materials along with re-brand.



EXTERNAL

- Upgrade the quality of our experiences and event presence both self produced and conjoined with external conferences.
- Revamp DC Research Forums and develop an additional 2 to 3 high-level standalone owned events within first 180 days of 2024.
- Identify priority revenue generating opportunities and targets for larger investment and create master plan/schedule for Jan–June 2024 to submit to c-suite and board.
- Execute high-level receptions/events around key tentpole opportunities in Q2/Q3 of 2024.

2024 TARGET EVENTS

SPONSORSHIP FOCUS FOR THE BEST OPPORTUNITIES



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INTRODUCING A NEW **VISION**

TO BRING OUR EVENT MARKETING EFFORTS INTO THE FUTURE

STRENGTHENING CONFERENCE SERVICES

A DEPARTMENT MORE COMPETITIVE THAN EVER

New Vendors



- On December 5th we finalized an RFP with Visual Communications out of Aston, PA as our new exhibit services vendor.
- Their pricing is extremely competitive, service is exceptional, and overall they will be a great asset to ETS.
- Their capabilities include fabrication, graphics, printing, warehousing, on-site management, installation/breakdown and more.

Inventory Liquidation

- Over 6,000 square feet of obsolete inventory has been disposed of. Transfer of remaining assets already being put in motion in conjunction with Visual Communications.

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FROM “THE CAGE” TO THE ETS PROMO HUB

BETTER ORGANIZATION MEANS BIG COST REDUCTIONS

Creating A Managed and Centralized Materials HQ

- An effort is already underway to clean out the cage by the Admin team but they need support by management and events.
- Events team will effectively take over managing the new Promo Hub for gifts, promotional items and marketing materials.
- With a combination of centralizing the system and onboarding new competitive vendors, we can save 30% - 40% on promotional spend.
- With the new ExhibitDay system we will be able to introduce an inventory control system for gifts, promotional items and marketing materials.

LR
PARIS

For higher end swag/gifts I've had deep discussion with LR Paris about custom creating three (3) tiers of ETS signature VIP gifts at that we can get bulk discounts on for use at event receptions/dinners, VIP visits on campus and more.

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WINNING HEARTS & MINDS

CULTIVATING OPPORTUNITIES FROM WITHIN

The Come Together Guide & Learning Module

- Digital resource (PDF) guide. Can also have accompanying webinar or learning module.
- Design to give basic understanding of event marketing with pro tips/insights.
- Will also introduce ETS Events Hub and new processes.

The Come Together Kickoff Luncheon

- Internally hosted luncheon for marketing, comms and business development staff.
- Designed to introduce new system and have open dialogue on event marketing.
- Cultivate Leads Internally by getting feedback from staff on impactful events.

Private Admin Kickoff Luncheon

- Small, private luncheon for Conference Services and Admin staff.
- Goal of both introducing new system and giving them a sense of ownership.
- Also great way to show appreciation for their hard work everyday.
- I'd out-of-pocket this If we did not have the budget to do it.

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THE TECHNOLOGY THAT BINDS US (PART I)

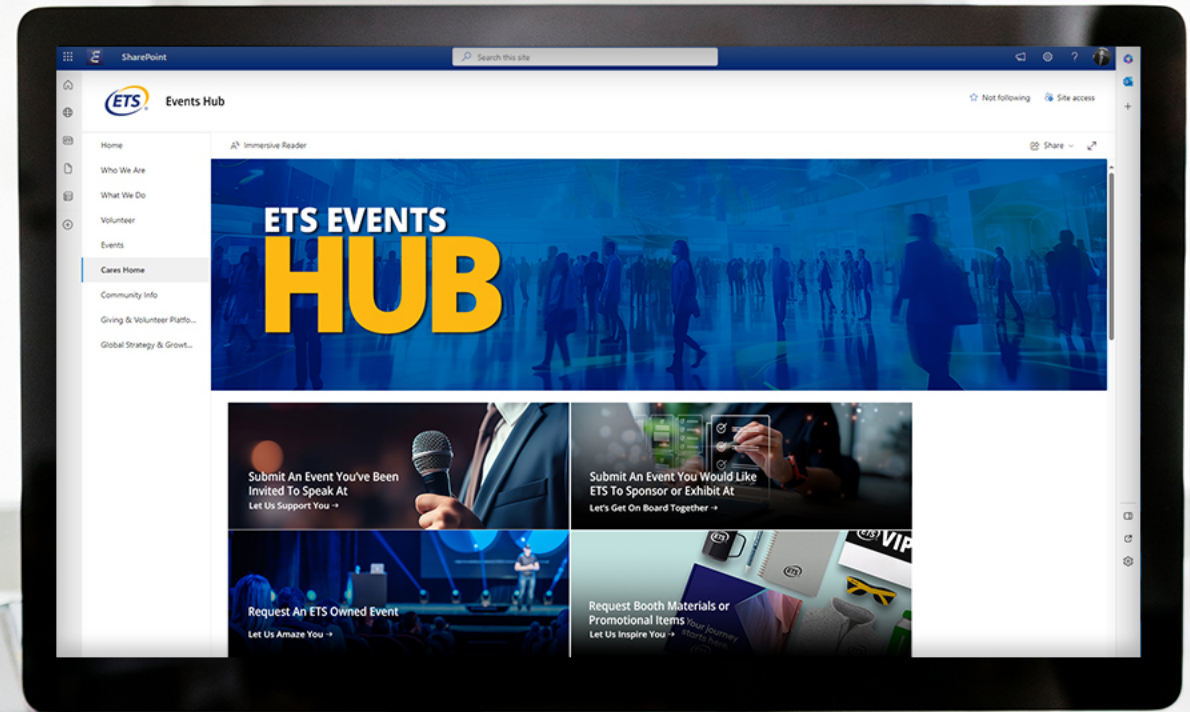
NEW INFRASTRUCTURE TO CENTRALIZE OUR EFFORTS

The ETS Events Hub

The new ETS Events Hub will be an easy to use internal tool with an icon on top of the ETS Inside Now site. On the page itself, users will have the option to submit requests using interactive forms both right into the new ExhibitDay system and/or directly to the events team (based on request). Options for submission requests include:

- *Submit An Event You've Been Invited To Speak At*
- *Submit An Event You would Like ETS To Sponsor or Exhibit At*
- *Request An ETS Owned Event*
- *Request Booth Materials or Promotional Items*

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THE TECHNOLOGY THAT BINDS US (PART II)

NEW INFRASTRUCTURE TO CENTRALIZE OUR EFFORTS

ExhibitDay Integration

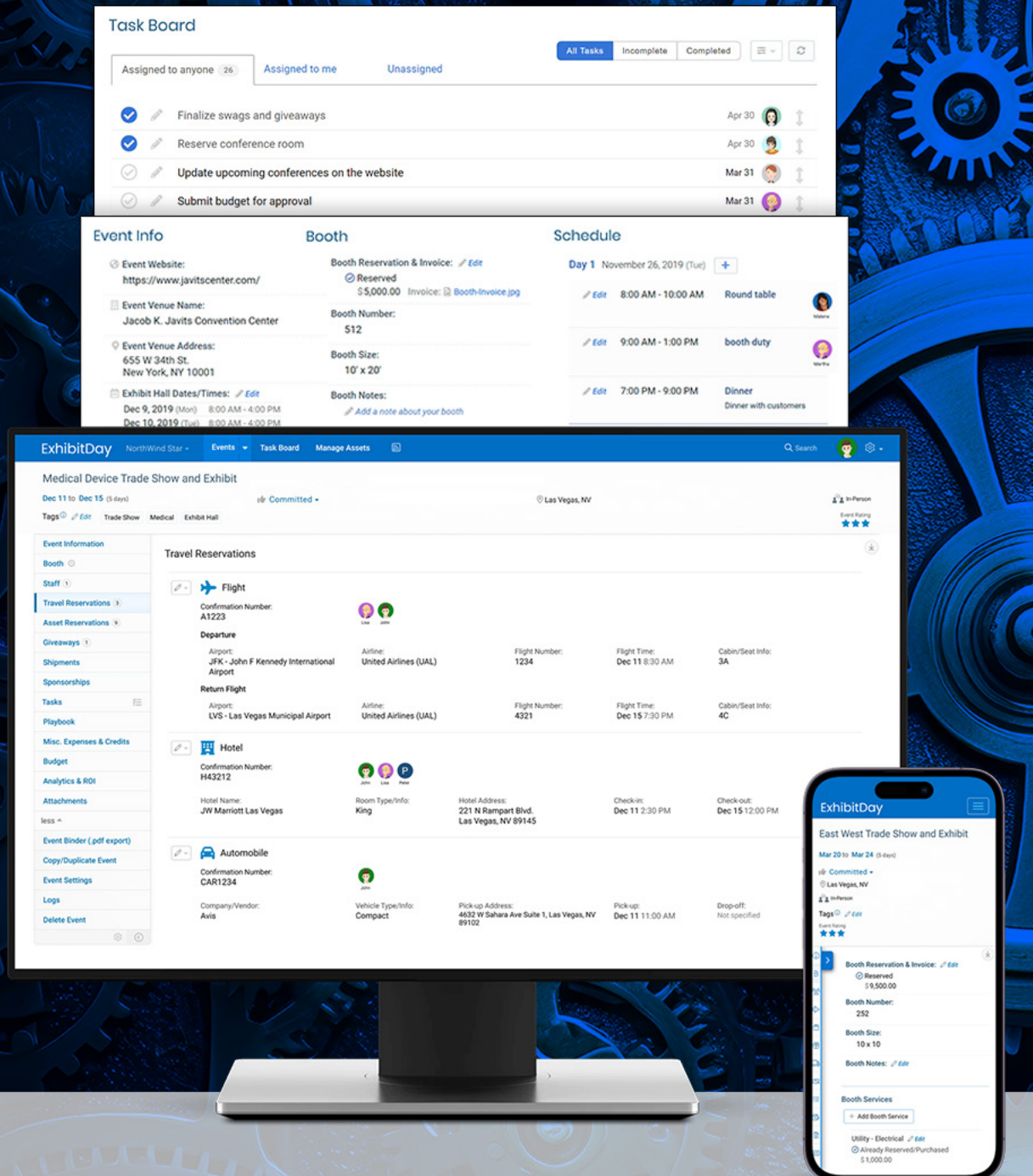
ExhibitDay is a fully customizable ecosystem for our needs that can be fully integrated into our systems with API Access.

Cost

The price we have been quoted for the enterprise plan is \$5,000 per year for the subscription and is all –inclusive.

What We Gain

- Centralized system and organization wide workflow.
- Better flow of knowledge and information in real time
- Eliminates need for layers of spreadsheets with no automation
- Staff and stakeholders can easily track events they are involved in.
- Will provide a complete playbook for each event
- Excellent reporting to help us track spend and ROI in multiple areas.



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THE BENEFITS OF ExhibitDay

Event Participation can be split between various cost centers, thus enabling us to better collaborate between divisions.



Task Manager so all stakeholders can see completed and outstanding tasks, as well as staff assigned to each task.



Integrates out of the box with Microsoft SSO, so we can connect the entire company, with no need for users to go through additional steps.



Full reporting system to track spend, ROI and event efficacy. System can also integrate with expo lead scanners.



Built-in inventory control tracking and ordering system that can integrate internally and with multiple vendors.



Generates an entire playbook for each event including deliverables, staff, travel/hotel arrangements, schedules, objectives, & more



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THE TECHNOLOGY THAT BINDS US (PART III)

NEW INFRASTRUCTURE TO CENTRALIZE OUR EFFORTS

New Internal Request/Vetting Process

- Forms must be submitted on ETS Events Hub.
- Event-based forms will automatically create a new event in ExhibitDay.
- Once new submission hits the system it will be vetted by events team
- After vetting a brief will be sent to person who submitted form
- Brief and decks will also be attached to the task board for the event in ExhibitDay.
- System categories will include ***New Submission, Event In Review, Awaiting Confirmation, Confirmed,*** and ***Not Participating.***

New External Request Process

- Forms will be created on the ETS.org site titled ***Request a Speaker or Sponsorship.***
- Submitted forms will go directly to the events team for trafficking
- Categories will include ***Request A Speaker and Request A Sponsorship***

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ETS OWNED EVENTS

CREATING THE IMAGE OF AN UNDISPUTED LEADER

THE POWER OF PERCEPTION

ROLEX, APPLE AND DEFINING OUR IMAGE AS A LEADER

It's All About Image

- The only difference between a \$14,995 Rolex's and a \$49.95 Casio, or a \$2,599 MacBook Pro and a \$564 Lenovo ThinkPad is how we perceive them.
- Every detail of their event marketing strategy whether it's sponsorships for Rolex or owned events like Apple, places the greatest weight on reflecting their status as both a brand leader and building a narrative around who they are.

ETS's Image

- The narrative of ETS as an undisputed leader has to be engrained in **everything** we do.
- It revolves around a brand standard of creativity and quality
- It requires us to be more selective in sponsorships and speaking opportunities, as well as raising a higher bar in the external events and receptions we produce.

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THE NEW ETS SIGNATURE STANDARD

CREATING OUR SIGNATURE EXPERIENCE POINTS

With a new re-brand coming in early 2024, we stand at the most opportune time in our history to create a new internal standard in event marketing.

The New ETS Signature Standard

In the public persona, when ETS as a brand is seen at an event (or is producing our own) we should strive to meet the following requirements:

Creative – Our event marketing should creatively challenge perceptions and further our narrative as trailblazers and changemakers in enabling human progress across education, work and lifelong learning.

Elevated – From top-tier production and focus on quality to utilizing cutting edge technology like holographics, we need to commit to producing elevated experiences that give us brand continuity whether it's our own internal event or booths and receptions at conferences.

Engaging – ETS Event Experiences should look to creatively engage audiences to think, feel and see things differently. We should strive to make engagement a top priority with mapped out points of contact at each event or activation.

Memorable – ETS Event Experiences should be leave a lasting imprint on attendees by going beyond talk to educate, entertain, interact and inspire.

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UPGRADING OUR MINDSET TO CREATE ELEVATED EXPERIENCES

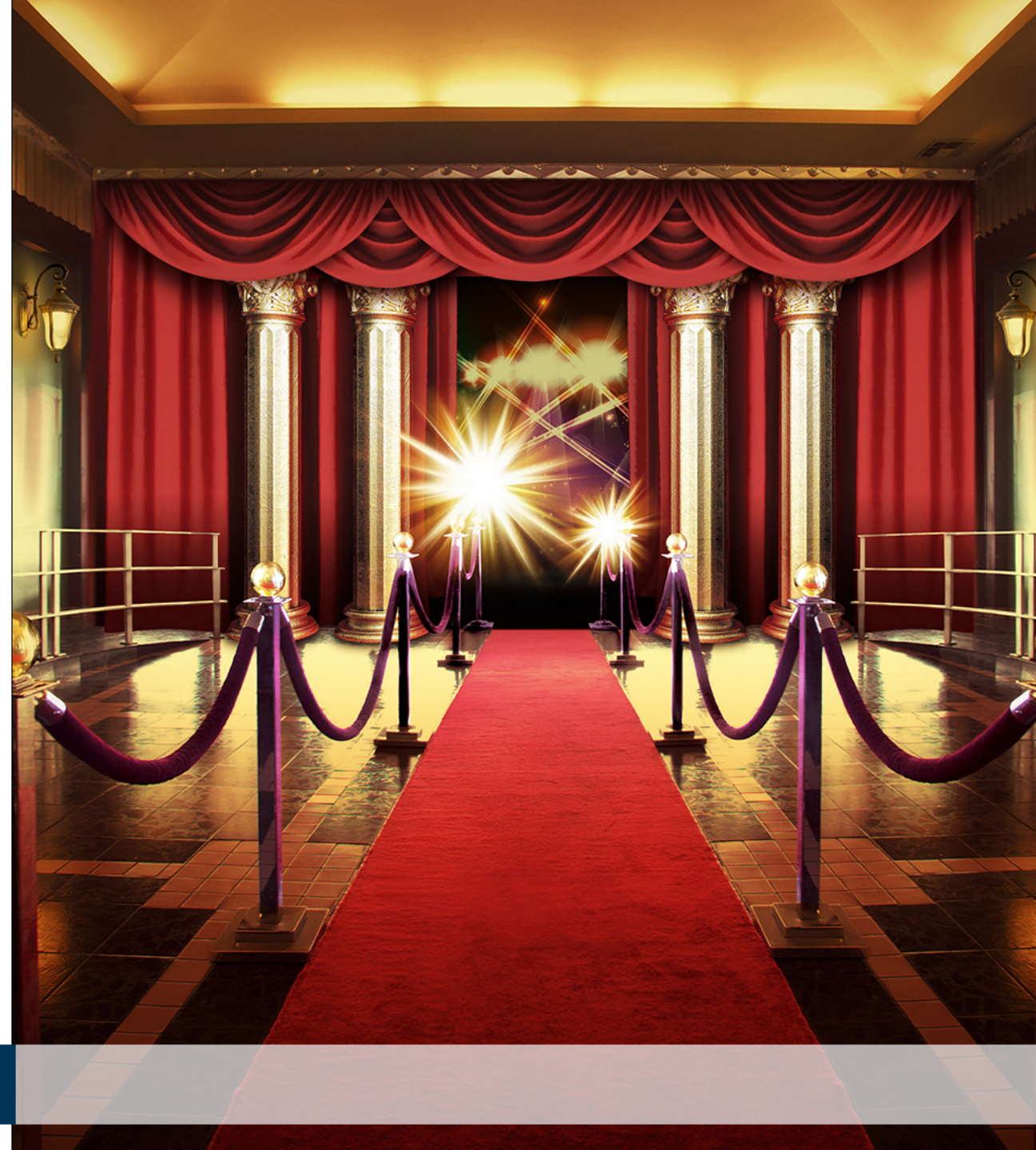
Creating an elegant, memorable event isn't about spending the most money. It's about crafting it with quality, carefully choosing our marketing and positioning, and designing an unforgettable experience.

Elevating Our Thinking

- One of the keys to elevating our events is a fundamental upgrade to how we view them. We can no longer accept mediocre, bland, and uninspired. Our events are exclusive, high end, and only for those we see as qualified to attend. After all, when you're the leader a plain meeting room and a pop-up banner doesn't cut it.

Elevating Our Words & Images

- Every part of our events must not only convey our message of industry leadership but most also incorporate elements of professionalism and exclusivity in our words and design. We are changemakers and when you step into our world you need to see and feel the change we're making.



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CREATING THE “WOW” FACTOR

SOME WAYS WE CAN STAND OUT FROM THE REST

Holographics

- Arht Media has created a cutting-edge technology called “The Capsule” that will allow us to present a combination of pre-recorded content and live interactions holographically. Imagine being able to speak to and interact with an audience without needing to physically be there.

Incentive Activations

- Incentive Activations are on-site gifting experiences that play into the theme of an event like a tailored denim bar, custom embroidery or embossing, sunglass fittings, accessories bars and more.

Interactive Kiosks

- Why just talk about our tech when we can show it off by investing in a few high quality branded, custom-designed interactive kiosks.

Entertainment and Experiential Activities

- We can get as creative with this as we want. Right now the biggest trend in events is creating experiences versus the status quo. Adding an element of fun and entertainment is sure to make things memorable.



COME TOGETHER

ETS BRANDED EVENT CONCEPTS

FOUR HIGH IMPACT PROGRAMS FOR 2024





THE CULINARY CATALYST

LEADERSHIP DINNER EXPERIENCES

THE CULINARY CATALYST

PART THOUGHT LEADERSHIP, PART GOURMET EXPERIENCE

Hosted at Amit's residence in Chevy Chase, Maryland, The Culinary Catalyst dinner experiences would bring together thought leaders for Jeffersonian-style evening of idea sharing and dialogue on important topics mixed with a "chef's table" experience of exquisitely curated cuisine and wine pairings prepared and hosted in person by some of the most renowned chefs and sommeliers in New York and Washington, DC.



THE ETS GLOBAL EDUCATION RESEARCH FORUMS

AN UPGRADED EDUCATIONAL EXPERIENCE

Currently known as the DC Research Forums, The ETS Global Research Education Forums will be upgraded events held quarterly in the DC area. The audience will be cultivated from an expanded list based on the focus of that quarter's forum including policymakers, federal agencies, think tanks, nonprofits, national associations, and foreign embassies/education ministers.

Content will focus on a singular overall "theme" reflected in branding and event design, and can feature keynotes, panels, Q & A, and more. Each event will feature both a luncheon and a closing cocktail/networking reception.



ETS INNOVACON

OUR ANNUAL CONFERENCE

InnovaCon will be ETS's signature annual global education conference showcasing the best of ETS innovation, research and technology. It will incorporate tracks for our Educator Ecosystem, Lifelong Learner Ecosystem, and Credentialing Ecosystem. This would be an event with media involvement, as well as involvement of the work of our global divisions. InnovaCon can also be used to drive revenue through both registration as well as sponsorship and exhibit sales if we wanted to open it up to other organizations as a full-fledged industry conference.



ETS WORKFORCE UNIVERSITY

A HANDS-ON BOOTCAMP FOR CORPORATE HR AND MORE

Alternated between Washington DC and New York City, ETS Workforce University is an annual two-day interactive workshop on workforce assessment and credentialing held by ETS and geared towards leaders from corporate human resources, credentialing bodies, government embassies and more.

**We could also do a version of this geared towards the education space from K12 to GRE to run concurrently with this as well.*



ETS WORKFORCE
UNIVERSITY
LABOR ASSESSMENT & CREDENTIALING WORKSHOP

THE CONVERGENCE *Social*

THE CONVERGENCE SOCIAL ETS FUTURISTIC TECHNOLOGY MARKETPLACE

As the confluence of AI and Education continues, ETS stands at the precipice of this merging as the leader in developing AI educational and assessment technology. The Convergence Social is a different type of event. It's less corporate talking-points and more futuristic technology and collaboration. It's out-of-the-box come to life. It's young, fresh and inventive. It screams that the future of ETS technology solutions are not black and white, but in panoramic vivid color and surround sound, and every part of it will support that narrative from the venue to the cocktails, points of engagement, entertainment and design.

NEEDED RESOURCES AND ROLLOUT SCHEDULE

PUTTING THE PLAN IN MOTION



THE NITTY GRITTY

WHAT WE'LL NEED TO BRING IT ALL TOGETHER

Budget

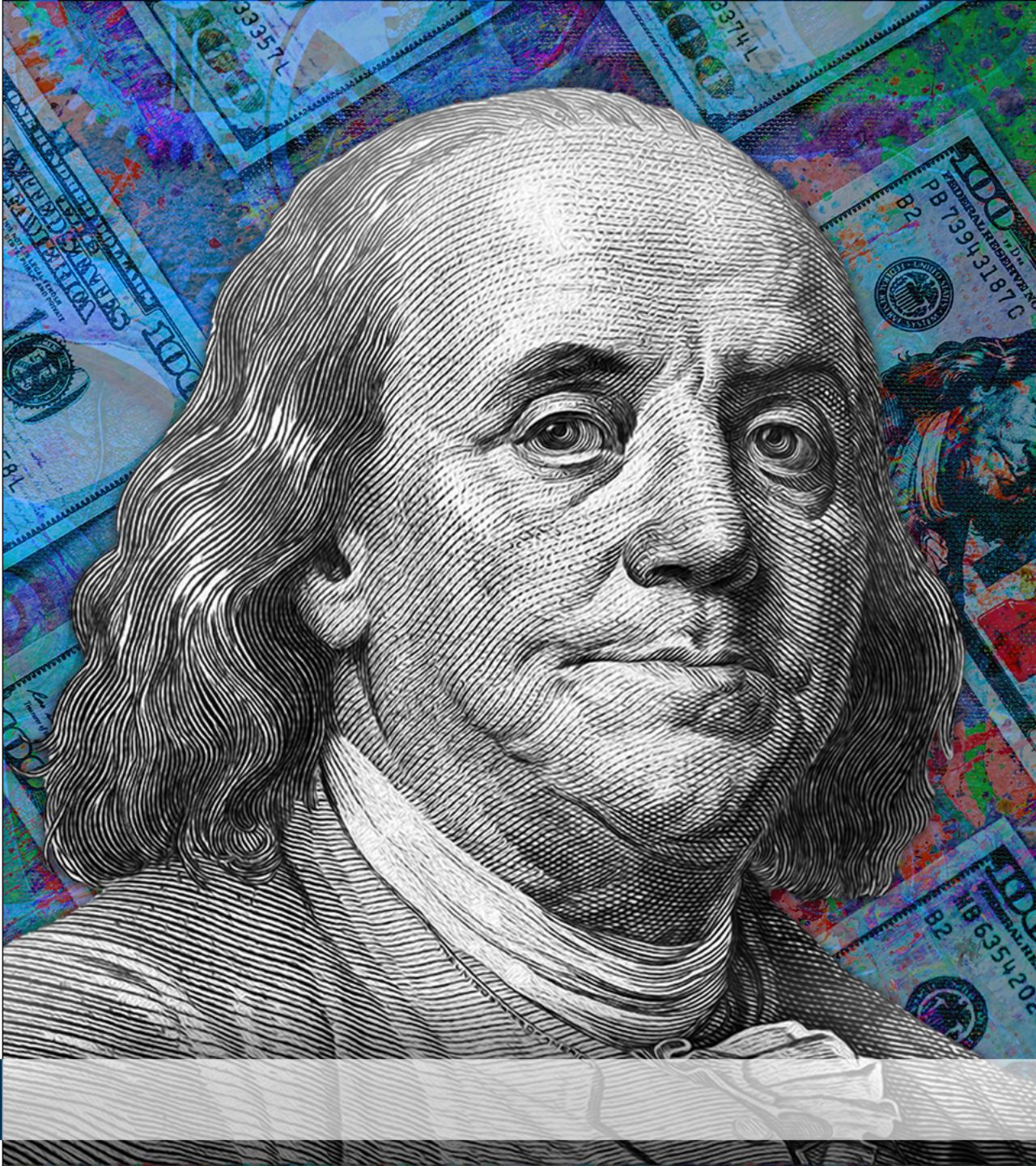
As of right now the only hard cost we have associated with this plan is \$5,000/year for ExhibitDay. However, especially as we begin developing our owned events programs, we'll need not only budget but the investments from management to make all of this happen.

Staff

As much as I'd love to be able to clone myself, I don't think ETS has developed that ability yet (I think...)

- Two full-time Junior Staff to assist both myself and conference services with day-to-day management of "The Cage", conference outreach, and vendor sourcing.
- We'll need at least one to two additional planners that can work with me in both logistics and on-site management for our various conference receptions, dinners and more

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IN THE IMMEDIATE FUTURE BRINGING ON AN AGENCY PARTNER



- American Guest is based in NYC with a team that produces corporate programs all over the globe.
- I've produced many events in partnership with them going back to around 2016 including The Knowledge Exchange series.
- Because of our past relationship not only can I attest to the quality of their work, as well as their integrity, but It would be a seamless transition as we'd be starting already on the same page as each other.
- They could be invaluable in giving me some breathing and planning room and being able to manage on-site activations, receptions, dinners, etc. at the various conferences we participate in.
- Until we adequately staff up, they could also provide me a team and invaluable support in producing our owned/branded events faster.

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ROLLOUT SCHEDULE, PART I

SCHEDULING AND TIMELINE FOR BOTH THE NEW SYSTEM AND RE-BRAND PROMOTIONAL ITEMS

Technology Implementation and Conference Services Plan

- RFP finalized on 12/5 with Visual Communications Inc. as our new exhibit services vendor.
- Liquidation of obsolete inventory from old vendor is completed and transfer from old vendors warehouses to VCI will be completed by 1/1/2024.
- The cage will be fully cleaned out and revamped by 4/1/2024 to coincide with the re-brand and the influx of new promotional products that will be ordered.
- Timelines for software implementation and building of the ETS Events Hub on SharePoint TBD based on IT guidance.

Staff Education & Interaction

- The guide and/or accompanying learning module would be ready for February 1, 2024.
- The Luncheons would happen in mid-to-late February as an introduction to the new system, with full system rollout anticipated for March 2024.

Re-Brand Promotional Items

- Once we have logos, new vendor PMSI Promos will put together a presentation on a program of 50 to 100 products for ETS Divisions to choose from, in order to maintain quality continuity.
- PMSI will also create an ETS Store for us for divisions to order from. Orders for re-brand items should be placed by January 31, 2024 with an in-hand date of March 22 or sooner.
- Once in-hand on March 22, 2024, items can be inventoried into new system and organized/stocked in the new Promo Hub (cage) in anticipation of 4/1/2024 usage date.

ROLLOUT SCHEDULE, PART II

SCHEDULING AND TIMELINE FOR ETS OWNED/BRANDED EVENTS PROGRAM

ETS Owned Events

- **The Global Research Forums** are already tentatively scheduled for March, June and September of 2024.
- **The Culinary Catalyst Leadership Dinner Experiences** should be done ultimately either bi-monthly or quarterly, and can be up and running for February once we clarify who is handling invites and attendees.
- The inaugural **Workplace University** event could be rolled out by May to June 2024 given the availability of budget and staff resources.
- **The Convergence Social** I would like to do in March of 2024, although if we wanted we could push it back into Summer or early Fall.
- **InnovaCon** will be a big effort and I would plan this for Q4 (Oct. – Dec.) of 2024. We'll need to have staff in place and working with me on sales, marketing and sourcing for this by April of 2024, as we'll need at least six unobstructed months for planning, sales, production and promotion.