



Guaranteed 1-1 meetings
with your ICP's

FREE EVALUATION CHECKLIST

How to Choose an Enterprise Event Marketing Agency

A working checklist for marketing and demand-gen leaders vetting agencies for executive dinners, roundtables, and virtual panels aimed at enterprise buyers.



A ConvergeX executive dinner in progress, with real delegates and real conversations.

6

areas to evaluate before you sign

5

questions to bring to your first call

4

red flags that should stop you

1

Proof of genuine delegate acquisition

Any agency can book a venue. Ask for evidence they can consistently get senior enterprise buyers into the room.

- ☐ Asked how they **source and vet attendees**, not just invite a purchased list
- ☐ Confirmed their **typical show-up rate** for a first-time client
- ☐ Reviewed a **real delegate list** from a comparable programme, with named companies
- ☐ Checked outcomes are reported in **numbers** (meetings booked, conversion rate), not adjectives

2

ABM integration

Events work best as part of an account-based strategy. Your agency needs to plug into it, not run alongside it.

- ☐ Agency can work from a **named account or regional ABM list**, not a generic invite pool
- ☐ Process exists to **keep direct competitors** out of the same room
- ☐ Agency briefs attendees so they understand the **topic and relevance** before arrival
- ☐ A shared **priority system** for accounts is agreed between marketing, sales, and the agency

Why it matters: event marketing agencies that understand ABM treat priority accounts as high-focus, high-alignment work, not a numbers game. Ask them to walk through how a named account moves through their process.

3

Format flexibility

Enterprise buyers don't respond to a single format. Your agency should flex to the audience, not push their default product.

- ☐ **Executive dinners** (typically 10–20 senior attendees)
- ☐ **Micro dinners** for secondary cities, where a full-scale dinner isn't viable
- ☐ **Roundtables**, in-person or virtual, with structured discussion rather than a straight presentation
- ☐ **Virtual panels** with genuine moderation, not a webinar with a host reading questions

4

Verifiable case studies

"We helped a leading SaaS company achieve outstanding results" is unverifiable by design. Push for specifics.

- ☐ Can they **name the companies** that attended, not just the client who paid?
- ☐ Is the outcome stated **in numbers**, not adjectives?
- ☐ Can you **speak to a reference client** from a similar programme?
- ☐ Do they show which **industries** they actually support?

5

Clarity on what they don't do

The most revealing question is the one most buyers skip.

- ☐ Agency clearly states what falls **outside their scope** (consumer events, exhibition stands, brand identity, speaker-for-hire, etc.)
- ☐ They say **"that's not what we do"** rather than nodding along to every request

6

Questions for your first call

Bring these into the first conversation, not the contract stage.

- ☐ Walk me through how you sourced attendees for your last three programmes in my industry
- ☐ What's your typical timeline from kickoff to event date?
- ☐ How do you handle a delegate cancelling close to the event?
- ☐ What does post-event follow-up look like, and whose responsibility is it?
- ☐ Can I see a full attendee list, with companies and titles, from a recent event?



Red flags to watch for

- ☒ **No named attendee proof.** Every case study is anonymised
- ☒ **One format, sold as flexible.** Dinners, roundtables and virtual panels pitched with identical language
- ☒ **Vague delegate acquisition process.** "We have a strong network" isn't a process
- ☒ **No clarity on what they don't do.** Claims to be full-service at everything



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PUT THIS CHECKLIST TO WORK

See this evaluation criteria applied in a real programme

ConvergeX Connections runs executive dinners, roundtables, and virtual panels for enterprise tech and SaaS brands across NAMER, EMEA, and APAC, with named delegate lists and measurable outcomes, not adjectives.

Evaluate ConvergeX as your event partner →

Quick agency scorecard

Delegate acquisition proof	
ABM integration	
Format flexibility	
Named case studies	
Clarity on scope	

Review real executive dinner & roundtable case studies

See named attendees, real outcomes, and full programme breakdowns at
convergexconnections.com