

# DESIGN SMALL, WIN BIG

*How Intimate Events Can Create Outsized Opportunities*

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**Liz Cherson**

Head of Events & Community | Bain Capital Ventures

EVENTASTIC 2026

**1 DINNER, BIG OUTCOME:**

**\$3.7B**

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*No crazy budget. No crazy format. Just intention and the right people in the right room.*

**WHO IS LIZ?** *(and why should you listen to anything I say?)*

# 12+ Years. Hundreds of Dinners. One Obsession.

**60–80**

Personally Manage  
Events Per Year

**180+**

Oversee  
Events Per Year

**12+**

Years in  
Venture Events

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Bain Capital Ventures · Greylock Partners · Stanford University · University of Pennsylvania



BCV



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**A NOTE OF GRATITUDE**



*Props to  
Edward Sullivan & Amy Jin of Velocity Coaching  
& Nat Ford from Lux Capital!*

VELOCITY

LU+

## THE PROBLEM

Most people optimize for  
being **impressive** instead of  
creating **connection** .

### Big Venue

→ People scatter, conversations fragment

### Big Guest List

→ Caliber diluted, energy diffused

### Big Budget

→ Impresses nobody, connects no one

*The events people remember aren't the biggest ones.*

**INTIMACY**  
**+ INTENTION**  
**= OUTSIZED ROI**

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*Small rooms. Small budgets. Massive opportunities.*

**DESIGN SMALL, WIN BIG**

THE SCIENCE

# Why This Works: The 4 Components of Connection

— Brené Brown



## WHAT CONNECTION UNLOCKS



01

# BEFORE

*Design With Intention*

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*The work happens before anyone walks in the door.*

**BEFORE**

# **Guest Curation: The Most Important Decision You'll Make**

**Quality over quantity. Always.  
Never sacrifice caliber for  
numbers.**

**BEFORE**

# How to Vet & Curate

## **01** Start with the outcome

What do you want this room to produce? Work backwards from the result.

## **02** Find hidden commonalities

Look for what your guests share that they don't know yet. That's the magic.

## **03** Curate for energy

Titles matter less than curiosity, generosity, and presence in a room.

## **04** Assigned seating is strategy

Who sits next to whom is one of the highest-leverage decisions you'll make.

**BEFORE**

# Venue as a Tool: Match the Space to the Goal

## INTIMATE DINNER

- **Contained space** — single conversation flows
- **Good acoustics** — no shouting across the table
- Remove all distractions (open doors, clutter)
- Nature elements can increase psychological safety

## WOW / IMPRESS EVENT

- Remote or unexpected location
- High-quality interactive activities
- Environmental spectacle creates shared memory
- Awe is a bonding mechanism

BEFORE

# The Table Is a Design Decision

**LONG TABLE**

8'x30" (standard)  
24" per person

**One flowing  
conversation**

8'x40" (Queen's)  
24" per person

ROUND TABLE →  
Fragmented  
sub-conversations

8-10 max guests for  
single flowing conversation

↕ Long tables over rounds

 Assigned seating =  
intentional connection design

BEFORE

# The Table Is a Design Decision



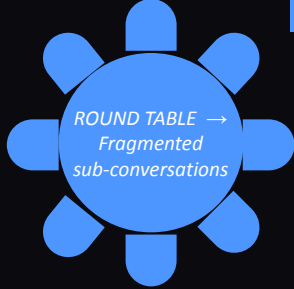
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**BEFORE**

# AI as Your Curation Co-Pilot

Source the right guests from your CRM or via cold outreach

Find non-obvious commonalities across your guest list

Design assigned seating around sales opportunities & shared challenges

Personalize outreach to every single invitee

Brief your team on who's coming with researched details

Act as a thought partner on topics, speakers & audience fit

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*AI doesn't replace the human touch — it removes the friction around it.*

BEFORE

# The AI-Powered Attendee Book

⚡ ATTENDEE BRIEF — Generated with AI — Real-Time & Up-to-Date

The prompt.

I'm hosting a dinner for the marquee speakers at Eventastic. Guests include:

- Carina Bauer, CEO of IMEX Group
- Amy Porterfield, Author
- Bozma Saint John
- Ann Handley, Chief Content Officer at MarketingProfs
- Nick Malouf, Head of Growth & Strategy, Event Solutions at LinkedIn
- Marisa Nebosky, Director, Special Events & Digital Marketing at FIFA
- Birianna Doe, Founder of Verbatim
- Michael Berean, Associate Dir of B2B Marketing Operations at SiriusXM
- Jordan Arnold, Director GTM - AI Video Solutions at RingCentral
- Kat Tooley, VP of Marketing at Hubspot
- Dahlia El Gazzar, founder of Dahlia+Agency
- Whitney Magnuson, Head of Brand & Media at Zoom
- Jay Schweidson, Founder of GURU Media Hub, Subjectline.com, and Eventastic and me, Liz Cherson, Head of Events & Community from Bain Capital Ventures.

What are my event assistant. I need you help figuring out: do any of these people already know each other?

What discussion topics would they all find interesting? who should I seat next to each other to make sure that they have really interesting conversations? would any of these people/companies collaborate together on something? have any of these people been in the news recently?

Here are the resources that I'd like to use you: the web https://eventastic.com/ Exa Apollo X

after you've gone step by step, at the very end of our conversation, I want you to generate an attendee brief for me that includes: - name - title - company - their areas of interest - notes about who they are, what they have in common with other guests - notes about if they or their company were in the news lately (include links)

suggested seating assignments in a graphic form. assume 2 rectangular tables of 8

The results.

4 WHO ALREADY KNOWS EACH OTHER

- 3 Confirmed relationships (sourced and verified):
  - Dahlia ↔ Jay — She's his official Eventastic Advisor
  - Dahlia ↔ Kat — She was Speaker + Meeting Host at UNBOUND 2025
  - Dahlia ↔ Jordan — They co-presented at Event Tech Live 2024 in Las Vegas
- Dahlia El Gazzar is the most connected person at this dinner besides you. She bridges both tables and knows at least 3 other guests from direct working relationships.

5 Likely known pairs — Carina ↔ Jay, Carina ↔ Kat, Ann ↔ Amy, Ann ↔ Jay, Nick ↔ Kat — all based on industry overlap.

4 DISCUSSION TOPICS FOR THE WHOLE ROOM

- AI in events & marketing — literally everyone has a stake
- Proving event ROI — universal pain point
- Creator economy meets B2B — Brianna, Ann, Amy, Jay, Bozma
- Live vs. digital events — an existential debate for this exact crowd
- Email marketing's renaissance — Jay, Ann, Amy, Michael
- Female leadership — 8 trailblazing women at this table
- Mega events at scale — ask Marisa EVERYTHING about the World Cup

4 SEATING LOGIC

Table 1 — The Events Visionaries anchored by Jay (it's his event) and you at the other end. Dahlia sits in the middle as connective tissue between Jay, Kat, and Jordan.

Table 2 — The Marketing Power Players anchored by Bozoma (the most magnetic presence in the room), Ann, Amy, and Brianna create a natural female founders / content trifecta.

Key notes:

- Zoom (Whitney) and RingCentral (Jordan) are intentionally at different tables — they're direct competitors
- Dahlia can float to Table 2 if you need an events voice there — she knows people at both

4 COLLABORATION SPARKS TO WATCH FOR

- Jay + SiriusXM (Michael) — literally a podcast advertising deal waiting to happen
- Kat + Marisa — UNBOUND meets FIFA World Cup is a killer industry playbook
- Brianna + Jay — B2B influencer track at Eventastic
- Zoom (Whitney) + LinkedIn (Nick) — natural co-marketing partners

4 HOT NEWS ITEMS TO REFERENCE AT DINNER

- Bozoma's RHOBH Reunion airs TOMORROW (April 23) — she'll definitely have thoughts
- Amy just closed her \$60M program in January — she's building something new
- HubSpot renamed UNBOUND to UNBOUND — that is in full launch mode
- FIFA World Cup starts June 11 — Marisa is in peak planning right now
- Zoom just named a global AOR and hired a new CPO from Microsoft Teams

eventastic\_attendee\_brief.pdf

### EVENTASTIC MARQUEE SPEAKERS DINNER

ATTENDEE INTELLIGENCE BRIEF  
Prepared for Liz Cherson, Head of Events & Community, Bain Capital Ventures  
Research compiled April 2024 | 14 Guests

14 Guests	8 Known Connections	3 Major Industry Overlap Areas	5 Guests in Recent News
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4 CONFIRMED CONNECTIONS: WHO ALREADY KNOWS WHOM

- Dahlia El Gazzar ↔ Jay Schweidson — She's his official Eventastic Advisor at Eventastic. They work together directly.
- Dahlia El Gazzar ↔ Kat Tooley — They served on Speaker + Eventastic Meeting Host at LinkedIn UNBOUND 2025. Shared working relationship.
- Dahlia El Gazzar ↔ Jordan Arnold — They co-presented a session at Event Tech Live 2024 (Las Vegas). Public info confirmed by publication. They are both marketing professionals.
- Carina Bauer ↔ Kat Tooley — Both are hosts of the B2B events podcast - B2B and Hubspot Marketing have significant overlap in industry roles. High probability they've met.
- Carina Bauer ↔ Jay Schweidson — Both are major events industry conference. Jay founded Eventastic. Carina was CEO. They work closely together.
- Ann Handley ↔ Jay Schweidson — Both are major events in event marketing and B2B content. MarketingProfs and Eventastic are major players in this space.
- Jay Schweidson ↔ Amy Porterfield — Both are AI marketing authors focused on marketing for entrepreneurs. Likely have shared stages or webinars.
- Nick Malouf ↔ Kat Tooley — HubSpot is a major LinkedIn partner and B2B/CRM sales leader. Likely have shared stages or webinars.

4 DISCUSSION TOPICS THAT WILL LIGHT UP THE WHOLE TABLE

AI's Role in Events Marketing — Universal interest — Easy pickup at B2B events + growing with AI.

Key contacts from Jay (AI in events marketing), Dahlia (AI advancement/tech), Jordan (AI video products), Marisa (Event & Community), Kat (podcast AI/CRM), Nick (LinkedIn event solutions), Bozoma (B2B content).

Each guest: background · talking points · connection opportunities · conversation starters

02

# DURING

*Create the Conditions for Connection*

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*Your job isn't to run an event. It's to engineer a moment.*

DURING

# The Facilitation Framework

1

## CREATE SAFETY

Set agreements upfront: confidentiality, phone norms, expectations. People need permission to be real.

2

## ESTABLISH SHARED MEANING

Define terms. Create shared language, roles. Give people a common frame before diving deep.

*Rigidity is the enemy of connection.*

DURING

# Read the Room

**Structure is a starting point, not a script.**

*The best facilitators hold their plan loosely and adapt in the moment.*

## SIGNALS TO WATCH FOR:

- **Energy drops:** Introduce an activity or shift the question
- **One person dominates:** Redirect with a direct question to someone quiet
- **Unexpected depth emerges:** Abandon the plan — stay in the moment
- **Room gets restless:** Take a break, reset with something physical

DURING

# What Can Go Wrong (War Stories)



## The PR Founder

Turned an intimate dinner into a pitch session for their own clients. The entire evening's energy collapsed.

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*Lesson: Vet intentions, not just credentials.*



## The Banker

Accidentally invited someone whose presence would have changed the room dynamic entirely. Had to uninvite them.

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*Lesson: Know your room before you send the invite.*



## The Co-Host

Went completely off-rails mid-event. Required a public, graceful intervention in front of the entire room.

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*Lesson: Vet your co-hosts as carefully as your guests.*

*The common thread: vetting, vetting, vetting — and always have a plan B.*

03

# AFTER

*This Is Where Most People Drop the Ball*

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*The event is the spark. The follow-through is the fire.*

AFTER

# The Follow-Up Is The Opportunity

## WHAT MOST PEOPLE DO

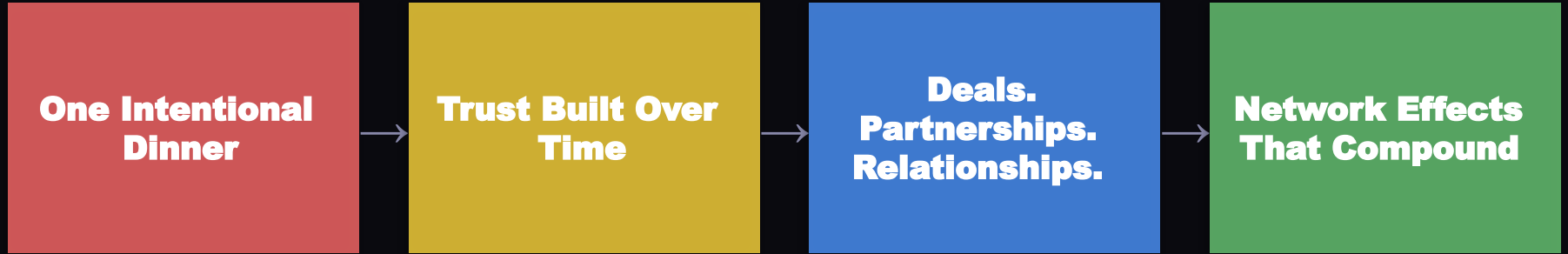
- Send a generic 'great to meet you' email
- Wait weeks before following up
- Forget to connect guests who should know each other
- Move on to planning the next event

## THE OPPORTUNITY

- Personalized follow-up that extends the connection
- Right message, right person, right time
- Make the introductions you promised
- Turn one dinner into a lasting relationship network

AFTER

# What Connection Compounds Into



*Remember that dinner I mentioned?*

**One dinner. One relationship. \$3.7 billion.**

*The AppDynamics acquisition started at a dinner.*

## THE DESIGN SMALL, WIN BIG FRAMEWORK

### BEFORE

- Curate with intention — quality over quantity
- Use AI to find hidden commonalities
- Match the venue to the goal
- Personalize outreach

### DURING

- Assigned seating as strategy
- Create safety and shared meaning
- 10 people max, long table over rounds
- Read the room — hold structure loosely

### AFTER

- Follow through — every time
- Personalized, timely, specific
- Make the introductions you promised
- Turn one dinner into a lasting network

**INTIMACY + INTENTION = OUTSIZED ROI**

## YOUR MOVE

# What You Can Do This Week

01

### **Audit your next event's guest list**

Is every person there for a reason? Are you sacrificing quality for numbers?

02

### **Build one attendee brief with AI**

Try it before your next meeting or dinner. See what you didn't know you were missing.

03

### **Design your seating with intention**

Who should meet whom? What deal could start at your table?

04

### **Follow up like you mean it**

Specific, personal, timely. This is where most of the ROI lives.

*The small room is where the big things start.*

# THANK YOU.

*Let's keep the conversation going!*

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**Liz Cherson**

Head of Events & Community  
Bain Capital Ventures



**Q & A**

Ask me anything about designing  
small events that win big.