

SPARGO, Inc.: Elevating the Event Experience at the IRI Annual Conference

The Challenge: Standing Out in the Competitive Insurance Industry Event Landscape

The **Insured Retirement Institute (IRI)** is the leading association representing the entire supply chain of insured retirement strategies, including life insurers, asset managers, broker-dealers, banks, marketing organizations, law firms, and solution providers. With IRI members accounting for 90 percent of annuity assets in the U.S. and serving millions of Americans, its annual conference is a critical event for industry leaders to connect, share insights, and shape the future of retirement security.

However, in a crowded landscape of financial and retirement-focused industry events, **IRI needed a strategic partner to help elevate its annual member conference** by enhancing attendee engagement, streamlining logistics, and **ensuring its event remained the premier gathering for thought leadership and business development in the insured retirement industry.**

The SPARGO Solution: Strategic Event Management for Maximum Impact

With a small internal staff, IRI needed a trusted partner to manage the complex logistics of its growing conference. **SPARGO seamlessly became an extension of the IRI team and over the past five years has provided an ever-improving comprehensive event management solution.** Our team:

✔ Created Real-Time KPI Dashboard

Used by senior leadership, this dashboard **provided key performance indicators** by pulling in registration, housing, and sponsorship sales data from multiple third-party systems **to proactively drive additional participation from its member firms.**

✔ Streamlined Sponsorship Sales and Fulfillment Tracking

Transitioning IRI from static Excel spreadsheets to a **dynamic, collaborative Smartsheet platform**, SPARGO built out linking grids and reports to provide real-time visibility into the sponsorship sales pipeline, confirmed sales, and fulfillment logistics. This transformation **allowed the IRI team and SPARGO to work seamlessly**, ensuring sponsorship commitments were efficiently tracked and executed.

✔ **Developed a Trusted Vendor Team**

Recognizing the need for a seamless and high-impact event experience, SPARGO **curated a trusted team of vendors to align with IRI's evolving conference goals**. A significant change in AV production brought a new level of professionalism and energy to general sessions, setting the tone for the retirement insurance industry. The **enhanced production quality** transformed the conference into a dynamic and engaging experience, **influencing how other industry events are now modeled**.

✔ **Optimized Housing to Improve Event Logistics and Reduce Attrition**

Before SPARGO, IRI experienced several housing difficulties, creating attrition risks and logistical challenges. **SPARGO streamlined the process** by sharing the housing link only registration confirmations, eliminating attrition, driving earlier registrations, reducing cancellations, and strengthening hotel pickup. As a result, IRI's housing block is now more predictable and easier to manage, **enhancing both financial and operational efficiency**.

The Impact: Record-Breaking Exhibitor Participation

With our assistance, IRI has achieved **leading results** at its annual conference:

📊 **41% increase in attendance** within the past three years

📊 **67% increase in sponsorship revenue** within the past three years

📊 **23% increase in sponsoring firms** within the past three years

📊 **A sold-out room block since 2022**, leading to the addition of multiple overflow hotels which has driven strong concessions in future year hotel contracts

Conclusion: A Partnership for Continued Growth

By partnering with SPARGO, IRI has **successfully transformed its annual conference into a premier event that delivers exceptional value to members, sponsors, and industry stakeholders**. Through **innovative solutions in event logistics, sponsorship management, housing optimization, and vendor quality**, SPARGO has helped IRI not only enhance the attendee experience but also **strengthen its financial performance and industry influence**.

As the insured retirement industry evolves, SPARGO remains a committed and trusted partner in ensuring that IRI's flagship event continues to set the gold standard. With a focus on continuous improvement and strategic innovation, SPARGO and IRI will build upon this success to drive even greater engagement, participation, and impact in the years to come.