

20 Top Tips To Win Over The CFO To Invest In An Event



Get ahead of the ask

Be proactive in bringing your proposal to the CFO - don't wait for them to ask, get them involved from the planning stages.

Lead with KPIs, not the vision

Open with why the event exists in business terms (revenue, pipeline, retention, brand equity), not what it will look like.

Tie timing to budget cycles and forecasting

Be proactive in bringing your proposal to the CFO - don't wait for them to ask, get them involved from the planning stages.

Use external validation

Reference competitors, industry norms or partner demand to reduce perceived risk.

Know what your 'tada' moment is

Present the key strategic imperative of running the event and what impact that will have on business from brand and/or revenue point of view.

Demonstrate audience quality, not just size

Who is attending is often more important than how many.

Compare event spend to other marketing channels

Frame the event as one option in the marketing strategy and show how it stacks up against other channels such as paid media, sponsorship or sales outreach.

Quantify the cost of not running the event

Missed pipeline, stagnant community growth or lost partner opportunities are real costs too.

Benchmark against past events

If you've run events before, show historical cost per lead, cost per attendee, or revenue impact.

Connect the event with long-term customer value

Show how the event contributes to retention, expansion or lifetime value, not just acquisition.

Speak in ranges, not certainties

CFOs don't expect certainty, they appreciate realism. Present conservative, likely and stretch scenarios.

Look past the event

Map how leads, partnerships, renewals or community momentum will be converted post-event.

Show how success will be measured (and reported)

Outline exactly what data will be captured and when results will be shared post-event.

Separate “must-haves” from “nice-to-haves”

Make it clear what delivers core value and what could be cut if the budget tightens. Be flexible.

Bring risk mitigation into the conversation early

Show you’re prepared by covering cancellation policies, insurance, minimum attendee thresholds and supplier contingencies up front.

Show what you’ve already negotiated

Even small wins like venue discounts or sponsor contributions show financial discipline.

Show where spend is scalable

Highlight which elements can grow or shrink based on ticket sales, sponsorship uptake or early indicators.

Be explicit about accountability

Make it clear who owns the budget, who signs off changes, and how overspend will be controlled. This builds trust fast with finance teams.

Make it easy to say yes

Present a clear recommendation and defined scope, not an open-ended discussion.

Involve the CFO in the event

We've worked with ex Adobe CMO Mark Phibbs a lot and he recommends you "get the CFO to present at the event talking on a topic targeting CFOs. There's nothing better than getting a CFO engaged and involved in an event for them to fully understand what the value is."