Measuring Meeting Value Guidebook

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MEETING PROFESSIONALS INTERNATIONAL

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Recently, less focus has been given on the halo-effect of meetings, and more focus is desired on the business values for companies and participants. This has led to the growth of SMM as the cost of meetings is subject to scrutiny. In 2013 and 2014, MPI identified that Strategic Meetings Management was growing. Strategic Meetings Management is a practice which helps companies to control their spending on meetings but also provides companies with more consistent relationships with suppliers and a more consistent quality experience. The value of meetings has had an increasingly important focus for many companies. Not only in relation to cost savings, but in relation to the value or return on investment of value-add components.

This guidebook contains tools and instruments that will help meeting professionals in measuring the value of meetings. Specifically, three components are focused on: Learning, Networking and Loyalty. The tools provided will help to gauge measurements that can then be translated into Return on Investment, or ROI for these three components of meetings. This data can assist the meeting planner in showing the value gained from the meeting and help with Strategic Meetings Management, as value has become an important aspect. The tools

and ideas provided include measurements and considerations for planning the meeting (pre-meeting), during the meeting and after the meeting (post-meeting).

The tools were put together by a team of researchers that first conducted a literature review of previous research in the three areas, and then tested the tools uncovered from that research at two large meetings. The team conducted thorough tests, over 50,000 data points were gathered. The tools were tested for both their practical application to meetings and their capacity to accurately measure the outcomes being tested. As a result, various tools are now at the disposal of professionals that go far beyond the post-event survey. The research showed that a multi-method approach can increase engagement, help enhance the robustness of any ROI claims and improve the chance of those returns being achieved.

THINK M-I-L-E

Measure - This means putting data as much as possible into numbers - quantifying, measuring, scoring consistently so that you can calculate using numbers to make your ROI.

Implicit- So much feedback we gain is free and never asked for such as the way people behave during a session, how people use our websites, apps and social media before, during and even after meetings. All of this gives us ways to measure the experience without asking all of our participants to fill in a survey.

Live - Once the meeting is over, if your participants did not like it, it is too late to make any changes. Measuring the live experience and recording it in some way can help planners make adjustments to the meeting in real time. Doing research at the event can also make participants more aware of what they should be expected to achieve. For example asking participants what they are learning and what they might use it for, would remind participants that they should be learning and thinking of how they can use the learning.

Explicit - The traditional methods of surveying and interviewing are not dead, so gaining explicit feedback to questions you ask is still a very critical part of evaluations.

DATA SAMPLING

There are many factors to consider when preparing for and thinking about data sampling. Often, planners rely of post-event surveys as one of the only means of gathering data. A common occurrence with these surveys are that not many people respond. Non- response is the worst form of bias as it cannot be accurately measured. We do not know how biased it is or in what way but we do know it's biased. Here, we will outline some best practices to ensure that the data collected is pertinent and representative of the entire meeting population.

The old adage 'less is more' is never more true than when sampling for meeting evaluation surveys. Forget about sending it out to as many as possible and annoying the majority. Instead focus in on a 'good' sample that represents the whole group you are interested in, without bias. The best way to achieve this is to have a random sample and to ensure that all of those chosen respond. A sample will be better if you choose 300 and get those 300 to respond rather than if you send to 2000 and get 500 responses. The key is to ensure that the chosen 300 are selected randomly from all the participants. Random selection works due to the laws of probability: the trick is to determine the right number to make the sample manageable and as representative as possible. We need to make sure that by randomly choosing people from all those attending we gain representative views of the whole group.

To determine the number we need to think about how different they potentially are (in their views, factors that we're interested in) and how accurate we need to be in the results. There is a statistical formula to determine this and it usually comes out at around 400. The key is to send to 400 and get 400 to respond, not to send to the entire group and get 400 to respond. If you have a small meeting of, say between 500 and 800, you can scale the sample down slightly – usually by 10% per 100 (360 for 700-800, 324 for 600-700, 292 for 500-600, 260 for 400-500, 234 for 300-400 and 211 for 200-300). Smaller than 200 then ask them all. To increase response rates incentivize the survey, send out pre-survey prompts and several reminders. If you still are not at 100% response rates after trying everything you can, you then need to randomly select another 100 (or whatever you are missing) and do the same again until you get to 400 (or whatever your max number needed is if less). They've still all been randomly selected but you will need to check the non–responders - if you can - just to see if they are different in some way (if they are you've got a biased sample). A useful way to do this is to see if later responders' views are different from early responders i.e. we assume that late responders are similar to non-responders. A bit of a cheat but it can help.

If you know you want to look at sub-groups separately (rather than get views from everyone) then you will need to scale up the sample to make sure you have at least 50 in each sub-group (25% extra for each subgroup). For example if you knew you wanted to look at first time participants separately from old-hands then you have two sub groups. The sample size would need to be increased to 500 (randomly selected). If you know the proportion of 1st timers to old hands you can sample in proportion and keep sample size at 400. For example, if you know 25% are new and 75% have been before then you would randomly choose 100 from the 1st timers list and 300 from the old hands. The sample therefore has the same proportions as the population

There are many other robust ways to gather deep and meaningful data. Smaller samples but studied in depth provide 'thick' data that can generate these insights and be the basis for real innovation. Live the participant's experience, get under their skin, into their shoes and their minds. There are many ways to achieve this. For example you can focus on two or three participants as case studies. Chat to them beforehand about their expectations and objectives, get them to record their experience in photos, notes, Tweets. Use these as the basis for a post event discussion. You'll be surprised at the insights gained from a few people that could never have been captured in a survey of 400. Combine the two and you'll really have data you can use effectively. To ensure that data is both wide spread and representative of the whole, as well as deep and meaningful, Think MILE.

LEARNING

A planned occurrence or experience that facilitates participants gaining knowledge, skills, attitudes and/or behaviors is considered to be a learning event. Many meetings advertise as learning events, or with learning as a focus of the meeting. Learning can be difficult to measure because it is a process and is dependent upon individuals and their environments. At meetings, learners are often diverse in terms of education level, seniority, age, tenure and thus, are at different stages for receiving, using or even interest in learning. Thus, different participants have different objectives for the meetings they attend. This toolkit is not a one size fits all concept that fits learning at every meeting or indeed learner types or styles, the Toolkit uses a best fit, pragmatic approach that can be adapted to a wide range of contexts and learner types.

The first job for a meeting professional is to determine what learning might take place, how much of the event will be designed for learning and how much participants will be motivated to attend because of the learning. The professional must then decide what type of learning will be taking place. The Toolkit breaks down the measurement of learning into three areas: Learning Environment – this includes factors relating to structure, design, setting as well as learner readiness and follow-up; Learning Process – this includes stages of the process to assess the depth of learning taking place; Learning into Action – this helps to identify the value of the 'what next?'. How much of the learning will be acted upon or adapted? Adult learning principles illustrate that the more relevant, meaningful and interactive a learning experience is, the better the odds are that the learning outcome will be achieved. These factors help us to break down what will be helpful to know in advance about our learners and what types of design and structure might support the outcome. The influencing factors are categorized as

DESIGN: measures factors that relate to level of challenge, nature of participants, the content, style and level of interaction

STRUCTURE: measures factors that relate to timing, breaks, structure to process learning Setting: measures factors that might optimize a learning setting such as varied room layouts, daylight and interaction

READINESS/RELEVANCE: measures factors on content, speaker and learner interest

FOLLOW-UP: measures factors relating to technology, hand-outs and continued communications.

Assessing these aspects before and after a meeting will help meeting professionals to prepare and adjust their designs to maximize the probability of learning outcomes. The Toolkit includes a scoring grid to help to reflect on all the components designed to maximize the probability of learning outcomes being achieved from best practices and adult learning theory.

Meeting professionals may choose to complete it a few times to see if scoring will improve in advance of the event. Learning environment is made up of a minimum of two instruments. If you can only use one due to resource constraints or other issues, use the scoring grid (choose as many questions as apply or all and use the same statements for your participants)

Learning Scoring Grid

Ask the following questions to people involved in organizing and designing the meeting (teams if necessary). Ignore the underlined headings which are there to inform you but not respondents on the specific areas these represent in your scoring grid.

DESIGN (SCORE OUT OF 10)

- Learning offers appropriate level of challenge to participants
- There are activities to suit a wide variety of learner styles
- Technology is used to aid interaction with experts
- There is a mix of new and repeat participants
- The meeting encourages mixing between more industry experienced and less experienced participants
- The content challenges the status quo
- Participants are likely to encounter different points of view
- There will be opportunities to benefit from collective as well as expert knowledge
- Participants will be able to put and test learning in their own context

SETTING – SCORE EACH OUT OF 10

- There are varied room layouts theatre style, cabaret style, boardroom style, informal etc.
- There is natural light
- Refreshments are available during sessions
- There will be spaces for participants to reflect on their own
- There will be spaces for pairs to discuss learning
- There are small group areas
- The meeting provides a safe environment for people to participate

STRUCTURE – SCORE EACH OUT OF 10

- There are frequent breaks
- There is time for reflection at the end of sessions
- Session timing is right for activities

FOLLOW-UP – SCORE EACH OUT OF 10

- The learning will provide new insights
- Social media will help to engage participants in the content
- Sessions will be recorded for participants to use at the event and after the event on any device
- Participants will be able to act upon their learning
- Participants will be encouraged to contact other participants after the event
- Participants are likely to access materials, hand-outs, slides after WEC
- This meeting is one event out of year round engagement

READINESS – SCORE EACH OUT OF 10

- Speakers will show interest in audience
- Participant needs have been significantly used to inform the selection of content
- The content will be very relevant to participants
- Participants will receive learning materials in advance of the meeting
- Participants will use an app for prescheduling and gaining information in advance of sessions
- Participants come ready to learn

Learning Scoring Grid Continued

For participants, ask the following questions after the meeting in a survey. You can use visuals to make a survey look more interesting, add star ratings and it is a good idea to randomize the items so that it will help avoids bias relating to ordering of questions.

DESIGN (SCORE OUT OF 10)

- Learning offered appropriate level of challenge
- There were activities to suit my learner style
- I used technology to interact with experts
- I met a mix of new and repeat participants
- The meeting encouraged mixing between more industry experienced and less experienced participants
- The content challenged the status quo
- I encountered different points of view
- I felt I benefited from collective as well as expert knowledge
- I could put and test learning in my own context

SETTING – (SCORE OUT OF 10)

- There were varied room layouts: theatre style, cabaret style, board-room style, informal etc.
- There was natural light
- Refreshments were available during sessions
- There were spaces for me to reflect on my own
- There were spaces for pairs to discuss learning
- There were small group areas
- WEC provided a safe environment for me to participate

STRUCTURE – (SCORE OUT OF 10)

- There were frequent breaks
- There was time for reflection at the end of sessions
- Session timing was right for activities

READINESS – (SCORE OUT OF 10)

- I feel participant needs have been significantly used to inform the selection of content
- Speakers showed interest in audience
- The content was very relevant to me
- I received materials in advance of WEC
- I used the WEC app for pre-scheduling and gaining information in advance of sessions
- I came ready to learn

See Observation Chart on page 8

The following tools are options to help you make a calculation on learning process. You can then make assumptions on the likely ROI of the meeting. Gathering information on the objectives of participants in advance of the meeting can be an effective way of identifying what the likely level of readiness and follow-up might be. Doing so can aid in categorizing participants into low – learning focused, medium- learning focused, and high – learning focused. You can gather this data in a pre-meeting survey or during meeting registration by survey or interviews. You can also monitor social media posts and additionally, you can conduct a post-meeting survey.

Add (and select which ones you would add/remove from the list) Please select your top three objectives for this meeting

_____ Meeting my peers
_____ Making new contacts
_____ Learning new things
_____ Promoting my business
_____ Meeting experts
_____ Learning how to do my job better
_____ Gaining professional education credits
_____ Having a break from work
_____ Seeing the destination
_____ Feeling part of the (insert organization name) Community
_____ Looking for new business
_____ Looking for a new job
_____ Strengthening my network
_____ No specific objectives
_____ Other - please specify

For learners with two or more objectives in their top three relating to learning – categorize as high-learning focused, for those with one objective to do with learning, categorize as medium learning focused and for those with none, categorize as low learning focused. This data will help you understand if your objectives are aligned to participants and if you can, you should be able to cluster the results.

You can also use the Scoring Grid Analysis in conjunction with the learner focus to design the learning to cater to the participants. This will help to increase your ROI for learning. In addition it will enable you to identify strategies to support your communications so that your participants are encouraged to prepare for the conference and that their expectations are met.

The value of participant learning is a critical part of measuring the overall value. To make it a dollar value, in advance of the meeting, organizations should establish how much their participants tend to spend on learning / education/ training on the areas the meeting will cover. For example an average training course in your region for media courses might be $1000 per participant for an eight hour day. That would mean that an estimated cost of training would be $125 per hour. Maintain this as a record of what the cost of learning is likely to be for your participants and you can test this later through asking participants either when they register for your event, at the event, or in a follow up survey or interview.

These costs will be used as the basis for calculating the 'R' (Return) in the formula so it is important that they are as realistic as possible for your participants to generate plausible ROI. You can also consider at this point what the average number of 'learning hours' might be at your meeting. This will work in particular if you have historic data relating to the number of sessions attended. However it is important to note that learning is likely to happen within and outside sessions – this was clearly happening at WEC and is identified in research (Hilliard, 2006). The 'I' (Investment) part is based on your knowledge of the likely average cost for participants for registration for your meeting. The Investment calculation does not account for lost time at work as this is likely to fluctuate far more greatly for most meetings given different seniority and tenure. If your conference is free you may wish to use travel and accommodation cost averages instead or if it an in-house meeting you can consider the total cost to the company of staging the meeting. A sensible starting point might be to use the information you have to provide a benchmark for how much the ROI might be so that you can make adjustments if you see that the ROI is low. The ROI is calculated at this stage as follows:

INVESTMENT: Your registration fee for attending a meeting ranges between $50 to $500. The average amount paid is $250

- (Average score for learning environment /10) x (average number of learning hours x average cost of training) /

Average registration cost of attending meeting)

- So if your overall score for learning environment is 7.5 which you calculated prior to the meeting then this means that your score is 75%
- If the average number of hours of learning is 6 and the average cost of training per hour for this sector is $100 then your total is $600
- $600 x 75% equals $450. This is the actual value of learning at your meeting based on your pre-event assessment of the learning environment.
- Divide the total value by the average registration investment ($250) and you would estimate that your ROI will be 1.8.

Learning environment is just one way to measure the value of learning and can be done before and after the meeting. However, to identify value it is important to consider not just how and where learning takes place but what learning has taken place and what will happen to the new knowledge, skills, attitudes and behaviors gained. The Toolkit focuses on learning process – i.e. how far a participant has processed the new information and what they intend to do as a result of the learning. Of course, learning takes time so, in most cases, it is highly unlikely that a short-life event will enable a participant to fully process their learning. Research has demonstrated that making participants aware and conscious of potential learning outcomes derived from event attendance can be effective for enhancing learning.

Some methods to gather this data are to ask the following question of participants during learning events, "Please tell us about any learning that you have experienced in this session or any questions that have occurred to you as a result of this session". You can also use observation during the meeting, and you can gather and analyze social media postings. These comments gathered provide a richer picture of the data. Use some form of learner log at your event to both gather research and reinforce the learning.

Research has demonstrated that making participants aware and conscious of potential learning outcomes derived from event attendance can be effective for enhancing learning.

We suggest a Carbon pad, or app question or post-it that asks:

- What learning has taken place?
- What questions arise as a result of attending this session / activity?

You can also at the meeting ask staff or volunteers to stop 1 in every 5 or 10 people at various points exiting sessions, or sitting or meeting in specific spaces and ask the interviewer to see if they could spare 5 minutes to answer a few questions. They should introduce themselves as a person acting on your behalf to find out about the experience.

The interviewer should note down answers to the questions and use only 5 minutes.

QUESTIONS:

- What did you want to achieve at this meeting?
- How would you describe your learning experience?
- What did you do in advance of the meeting to prepare?
- What do you think will happen to the learning after the conference?

You can then organize this data into the 5 phases of the learning process and 3 phases of learning to action. The 5 phases of the learning processes are Basic Feedback, Acknowledgement, Contemplation, Reaction and Leap to a New Idea. The 3 phases of learning to action are No Action, Application and Adaptation.

Score the data on the 5 phases of the learning process between 0 and 10 as follows:

- No response (sheet handed in blank, nothing to say about learning) 0
- Acknowledgement (repeating info, describing content) 2.5
- Contemplation (raising questions, using words like I think, I believe) 5
- Reaction (showing usually emotional responses to content) 7.5
- Leap to a new idea (showing connection, we can use this where I work, or what about this) 10

And learning to action as follows:

- No response (no mention of action) 0
- Application (I will use this, I am going to implement it) 10 Adaptation (I want to share this with colleagues, could use this) 5

It is also suggested to conduct a post-event survey. In addition to the questions above on learning objectives, also ask about the amount of time participants spent at events during the meeting and validate the average cost of training per hour that you gathered from research for your participants. Most importantly,

we want to discover what happens to the learning after the meeting. Using a 7-point Likert Scale from Strongly Disagree to Strongly Agree, as the following questions:

Scores for these statements are the extent to which someone intends to act on the learning

- I will implement all of my learning from WEC in my current job I think my learning will improve our business performance
- I think my learning will help increase profits for my business

Scores for these statements are the extent to which someone will adapt the learning

- I will share my learning with one colleague.
- I will present my learning from WEC to colleagues in my company. I think my learning will make me better at my job.
- I think my learning will improve my chances of promotion.

Meeting professionals need to think beyond the generic term of networking and think about the goals of participants and how the meeting's design meets the needs.

To calculate the final formula for Learning ROI you will want to do the following:

1. Calculate the Average score across all areas and instruments used for learner environment, learning process and leaning into action to get the Learning Percentage
2. Multiply the average number of learning hours for the meeting and the average cost of learning per hour for your participants to get an average cost.
3. Calculate the percentage calculated in Step 1 of the average cost calculated from Step 2 to get the average value.
4. Take the average value from Step 3 subtract the average cost of attendance at this meeting to get the Learning ROI for an average participant.

NETWORKING

Networking is a common reason that participants attend meetings. It occurs in many forms and can occur in many activities, ones that are planned for networking and even ones that are not. It can occur among participants in an education session, on trade show floors or even in the morning coffee areas of a conference. To this end, there are different types of networkers, depending upon what participants hope to gain from networking. To be able to measure the effect of networking at meetings, we need to consider the objectives of the participants and the desired outcomes that will result from these connections. The value of networking is in the outcomes that lead to better business performance. The range of motivations and outcomes is much more complex than current forms of evaluation can measure. To be able to capture information on the value of networking, meeting professionals need to consider the long-term impact and try to determine how the interactions between participants at meetings provide value.

Meeting professionals need to think beyond the generic term of networking and think about the goals of participants and how the meeting's design meets these needs. For example, if participants wish to share their experiences and learn from others there needs to be interactive sessions that allow for this. Additionally, if reconnecting with already known contacts is a key goal, then informal meeting spaces need to be available. When designing networking activities it is necessary to consider how the design meets participant need(s). Key factors to consider are:

- **Degree of structure** – unstructured event or detailed schedule of activities?
- **Degree of formality** – business-like or more informal?
- **Degree of mingling** – encouraging mingling or known-contact interactions?

Designing your networking opportunities with each of these factors in mind will enable you to tailor your events to your participants and be more inclusive of the different types of networkers. To be strategic in meeting planning, the meeting needs to align with business objectives. Therefore it is important that meeting professionals match their meeting design to the participant objectives.

Before the event you can generate a networking focus score and networker profile for your participants. If you can only use one of these tools due to resource constraints or other issues, use the networker profile. Observations and interviews with participants and meeting professionals indicated that certain networking activities are best for specific networking profiles and goals. The networking opportunities tool can be used to select the most appropriate opportunities for your participants.

NETWORKING FOCUS SCORE:

Questions:

On a scale of 1-5 (5 being the most important), how important is networking to you at this meeting? Rate the importance of the following on a scale of 1-5 (5 being the most important):

- Meet new contacts
- Reconnect with established contacts
- Sharing ideas/innovation generation
- Closer relationship with peers
- Collaboration/shared resources
- Sales
- Relationship development

Add together the value of each response and divide by 8 (number of questions) to give an average score. You can also set up an Excel spreadsheet to make the calculation of this score easier.

NETWORKER PROFILES:

Questions:

How long do you intend to spend at the meeting? (Adapt to required number of days)

1= Half a day (3 hours)
2= 1 full day (6 hours)
3 = 1 and a half days (9 hours)
4 = 2 days (12 hours)
5 = 3 days (18 hours)

How much preparation have you done/will you do for the meeting? (Adapt to meet your requirements)

1= little
2= review schedule
3= select sessions and review participant list
4= select sessions, review participant list and make some appointments
5= select sessions, review participant list, make appointments and sign up for social events

What do you intend to do at the meeting?

1 = look around the show floor
2 = look around the show floor and attend educational sessions
3 = look around the show floor, attend educational sessions and have informal appointments
4 = look around the show floor, attend educational sessions and attend appointments
5 = look around the show floor, attend educational sessions, attend appointments and go to social events

Add together the value of each response to the three questions above as well as the networking focus score and divide by 4 to give an average score. The total score can used to determine the networker profile using the table below. You can also set up an Excel spreadsheet to make the calculation of this score easier. If you are using the networker profile tool only you can simply use the average of the three questions above to determine the networker profile.

See Networkers Profile Chart on page 9

The value of the connections made/ reinforced is dependent on the post event follow up and the outcomes derived. To make it a dollar value, in advance of the meeting organizations should establish how much their participants tend to spend on generating new leads, promotion and creative/ innovative idea generation. This would differ depending on the industry; therefore it is important to do industry-specific research. Maintain this as a record of what the cost of networking is likely to be for your participants and you can test these later through asking participants either when they register for your event, at the event or in a survey. These costs will be used as the basis for calculating the return in the formula so it is important that they are as realistic as possible for your participants to generate ROI.

During the meeting, planners can determine if participants are engaging in the networking activities that best suit them by reviewing scanning data which records the sessions being attended. Observation of areas specially designed for the type of participants will also demonstrate whether these areas are being sufficiently used. Scanning data will also provide information on the time that participants spend at the meeting. Research conducted to date on multi-day meetings demonstrates that the number of contacts a participant makes increases significantly once they have spent at least 5 hours at the meeting. The likelihood of following up with contacts also increased with the length of time spent at the meeting. This suggests that participants need a little time to warm up when they are networking and having a networking event in the midst of the meeting could produce more connections. Participants should also be encouraged to log the contacts being made during the meeting. This will help them to follow up after the event, but will also remind them of their networking goals and how well they are achieving them during the event. It is the action taken after the event that often provides most value from the event. This can be done through devices that support networking and contact retrieval. You can also monitor social media to identify how much networking is happening.

To demonstrate the participants networking during the event you can also calculate an event networking score by asking the following:

Questions:
Time spent at meeting?

1 = Half a day (3 hours)
2 = 1 full day (6 hours)
3 = 1 and a half days (9 hours)
4 = 2 days (12 hours)
5 = 3 days (18 hours)

Number of contacts made:

1 = 0-4
2 = 5-10
3 = 11-15
4 = 16-20
5 = 20 or more

% of suggested networking activities and events attended
1 = 0-20%
2 = 21-40%
3 = 41-60%
4 = 61-80%
5 = 81-100%

Add together the value of each response and divide by 3 (number of questions) to give an average score. You can also set up an Excel spreadsheet to make the calculation of this score easier.

In order to calculate the participant networking ROI, participants will need to complete the contact log and indicate the number of contacts they have followed up with. Capturing this and the following data in a table is most efficient. Participants generally follow up with 2-3 out of 10 contacts. Participants should then assign values to each of the benefits that each of these contacts provide (Sharing Ideas, Relationship with Peers, Collaboration, Sales, Relationship Development, etc.). The participant indicates the value of each contact out of 10. The average for each benefit is derived then divided by 10 and multiplied by the percent of contacts that the participant followed up with to give a percentage of the value that can be attributed to those contacts. This percentage of value derived from the contacts is then calculated from the average cost of this benefit (as provided from earlier market research). The value of each benefit is added together and then the ROI calculation is done by using the average costs of attending .

See ROI Calculation Chart on page 9

LOYALTY

Loyalty has become an increasingly important aspect of meeting. Professional associations, employers and other organizations utilize meetings to reward and incentivize their members and employees with the objective of building loyalty, as the competition has increased for what meetings those members and employees could attend. This loyalty is assumed to lead to a number of positive outcomes including greater employee retention, positive word of mouth, advocacy and higher levels of motivation. These outcomes all have a potential dollar impact providing a return on the investment made in attending the meeting.

In order to better understand and measure loyalty, we need to break loyalty down into its component parts. These are made up of experiential, attitudinal and behavioral factors. Experience creates attitude which leads to behavior. If we can design the experience with these outcomes in mind we will achieve greater loyalty benefits and assessing each can get us closer to being able to put a 'loyalty value' on meeting attendance. The elements of experience that affect loyalty are enjoyment, learning and networking. The attitudinal or emotional aspect of loyalty is about how we are made to feel in relation to the association, conference, or employer. The key elements of this are identified as feeling proud and feeling valued. The behavioral elements of loyalty again can be identified by two key actions: recommendation and retention.

To measure the effect of meeting attendance on change in loyalty we need to focus on the attitudinal and the behavioral, the outcomes rather than the experiences. In doing this we overcome the problem of how different people react differently to experiences. We can start to understand and measure changes in loyalty to the

employer, the network, the funder or the meeting by assessing how the experience made them feel (more or less valued, more or less proud) and how that affects how they intend to behave (recommend, return, stay with). We must also ensure that we design the meeting in such a way as to provide the experiences that can create feelings of worth and pride.

With the right survey instrument we can assess and map changes in these four indicators of loyalty and create an overall loyalty score. These four indicators are Valued, Proud, Recommend and Stay. Using a simple survey we can assess the participant's feelings of pride and being valued and can ask them about their behavioral intentions. The simpler the survey the higher the response rate. From these simple questions we can map out the contribution of the meeting on four key indicators of loyalty using a radar diagram. Research has shown that loyalty can be accurately measured using just four simple statements and the response set yes definitely, yes maybe, not really, no way.

MEASURING THE LOYALTY EFFECT
– Survey Instrument

A. Loyalty to employer/association (using the four point response set: yes definitely, yes maybe, not really, no way)

1. Being able to attend this meeting makes me prouder to work for this company/be a member of this association.
2. Being able to attend this meeting makes me more likely to recommend my company/this association to my networks.
3. Being able to attend this meeting makes me more likely to stay with this company /association.
   - What do you think it is about the meeting, your employer, association that makes you feel that way?
4. Being able to attend this meeting makes me feel more valued as an employee/ member?
   - Could you have a go at explaining why that is?

B. If required – loyalty to the meeting can also be measured (using the three point response set: likely, unsure, unlikely)

1. What is the likelihood you will attend the meeting next year?
2. What is the likelihood you will recommend attending next year's meeting to others in your organization?
3. What is the likelihood you will recommend attending next year's meeting to others outside your organization?
   - Could you tell us a little about why that is?

See Radar Diagram Chart on page 10

Although these statistics provide an interesting overview and the basis for calculating ROI - it is the reasons behind the responses that give us real understanding of whether the loyalty demonstrated is spurious or real and therefore a better idea of its value. This is where the written responses, open-ended questions and rich data gathered from interviews can provide the all-important insights discussed earlier. Other methods can further enhance our understanding of the loyalty effect. A fairly cost effective tool is analysis of social media buzz. Tweets in particular can be equated to loyalty once filtered for positive and negative comments relating to feeling valued, being proud, telling others, and give further indications of which elements of the meeting created this response. For example - A content analysis of tweets can provide useful evidence of loyalty creation and can effectively be displayed using tag clouds.

The ROI can then be calculated for each individual, for all employees/members attending or for the meeting as a whole.

The next step is to put a dollar value on the loyalty created. The cost of recruiting an on-boarding a new employee is quite steep. An uplift in loyalty makes it more likely that the employee will be retained and therefore represents a potential saving on a proportion of these costs. The cost of recruiting a new member for an association may be easier to calculate based on a specific association and this in turn can be equated to a loyalty uplift value. In order to calculate this saving we can use the survey tool described earlier to calculate a loyalty uplift value (LUV) for each participant.

See Loyalty Uplift Value Chart on page 10

Charts

Observation Chart

Example observation sheet for learning

Date	Title of session
Type of session	No. of participants Describe participants
Room Layout	Name of reviewer

What would you overall score for this session be?

Is this session (circle along each continuum)

Structured — Unstructured

Well timed — Rushed

Interactive — Passive

Hands-on — Theory

Speaker interest in audience — No interest

Openness to questions — Scripted

Audience Focused — Distracted

General comments/observations

Scoring Grid Analysis Calculate mean averages for each aspect of learning environment and create a radar diagram (this can be done in Excel) taken from organizer scores and participant scores. Add all the scores from participants and create a mean average for learning environment. Observation during the meeting is another way to measure learning environment. Observe at least 10% of the events and randomly select the ones to observe.

Charts

Networker Profile

Networker Profiles Characteristics	Intensive User	Special Purpose User	Stroller	Pragmatist
Meeting use	Full and frequent use of all opportunities available during the event	Will not engage beyond purpose	No clear purpose	Obtains technical information
Preparation for the meeting	• Reviews schedule • Makes appointments • Schedules social activities and other associated events	• Reviews schedule • Reviews participant list • Contracts and arranges all appointments prior to the meeting	Little preparation undertaken	Reviews the schedule
Time spent at meeting	Attends every day for the full amount of time	Attends for 1-2 days	Attends for half a day	Attends for 1 day
Total Score	4 and above	3-4	0-2	2-3

ROI Calculation

Cost of benefit without meeting	US$	Value achieved
New idea generation	4000	700.00
Association membership	400	60.00
Shared resources	800	130.00
New Ideas and promotion	7000	1050.00
Relationship management	2500	375.00
		$2,315.00
Total cost of attend event		1000.00
ROI		131.50%

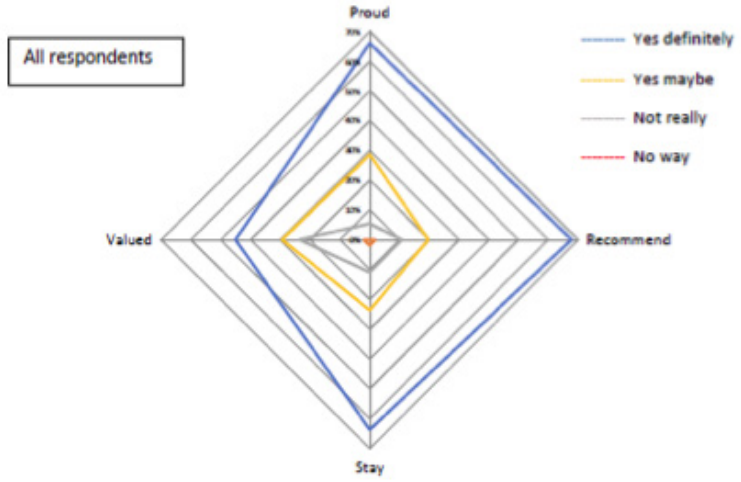
Loyalty Uplift Value

Loyalty Score	Loyalty weighting	LUV = weighting* recruitment cost (ex. $50,000)	Net Loyalty Value of Meeting: Deduct cost of meeting attendance (ex. $3,000)
8	20%	$10,000.00	$7,000.00
7	18%	$8,750.00	$5,750.00
6	15%	$7,500.00	$4,500.00
5	13%	$6,250.00	$3,250.00
4	10%	$5,000.00	$2,000.00
3	8%	$3,750.00	$750.00
2	5%	$2,500.00	-$500.00
1	3%	$1,250.00	-$1,750.00
0	0%	$0.00	-$3,000.00
-1	-3%	-$1,250.00	-$4,250.00
-2	-5%	-$2,500.00	-$5,500.00
-3	-8%	-$3,750.00	-$6,750.00
-4	-10%	-$5,000.00	-$8,000.00
-5	-13%	-$6,250.00	-$9,250.00
-6	-15%	-$7,500.00	-$10,500.00
-7	-18%	-$8,750.00	-$11,750.00
-8	-20%	-$10,000.00	-$13,000.00

This can be calculated for each participant and totaled for the meeting. It can also be used to calculate the ROI for each organization using the meeting to build loyalty. It does however require a realistic estimate of the cost of recruitment and realistic estimate of the maximum effect the meeting can have on loyalty (estimated here as 20%). This will vary by meeting and by organization. One way to overcome this issue is to calculate the value as a comparative measure only, i.e. a score to compare one meeting with another rather than a dollar saving.

1. Each of the four measures (questions) of loyalty is scored: 2 for yes definitely, 1 for yes maybe, 0 for unsure/no change, -1 for not really, and -2 for no way.
2. Adding these four scores together gives a total loyalty score for each respondent with a maximum score of 8 and a minimum score of -8.
3. Based on a maximum saving of 20% (i.e. 20% more likely they will not need to be replaced) we can calculate a weighting for each score. The weightings in between 20% and -20% are calculated exponentially as an eighth of the one before creating a LUV calculation table (see left). Don't worry – we've done that for you in the second column of the table.
4. We then multiply the loyalty weighting percentage appropriate to the respondent's total score by the estimated cost of recruiting a new employee (column 3)
5. The final step is to deduct the cost of meeting attendance to give the net value (column 4).

Radar Diagram



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The UK Centre for Events Management (UKCEM) has been leading events management research and education for over 20 years. The Centre is the largest dedicated events management educational centre in the World and provides Higher Education from degree to PhD level in events management with specialisms in conferences, sporting events, festivals and major events. The team have developed professional training including the CMP Boot Camp in the UK and have led global research on innovation in the events industry, event experience, economic impact of the meetings industry, strategic meetings management, Corporate Social Responsibility and future trends in the meetings industry. The UKCEM is part of the International Centre for Research in Events, Tourism and Hospitality at Leeds Beckett University in the UK. Website **http://www.leedsbeckett.ac.uk** Twitter @UKCEM

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