

Evaluation & Measurement—Completing the Circle

PMM5 Postscript™ Number 51

Background Information: Post-program analysis is critical because it completes the planning process. Chapter 46 in *Professional Meeting Management*®, fifth edition, provides a comprehensive discussion of evaluation. In that chapter, Monica Myhill and Jack Phillips includes information on:

- The purpose and benefit of evaluating a meeting or event
- The six levels of evaluation
- Types of data within each level, how to collect the data and a measurement plan
- Possible questions for the data collection
- Increasing response rates

The chapter outlines the steps and process for completing evaluation at any level (Statistics Scope and Volume [Level 0], Reaction [Level 1], Learning [Level 2], Application [Level 3], Business Impact [Level 4] and Return on Investment [Level 5]).

PMM5 Postscriptä Use: This PMM5 Postscript™ further discusses how measurement completes the planning cycle and importance of reporting. It also addresses the pitfalls of not measuring. The PMM5 Postscript™ also includes additional group discussion or research projects to supplement the PMM5 chapter.

Learner Outcomes: At the completion of this reading, you should be able to:

- Explain why ROI is not the only measurement level.
- List five ways to improve the evaluation process.
- Discuss at least three pitfalls of not evaluating meetings.

Related PMM5 Chapter: Chapter 2, Starting with the End in Mind
 Authors: Monica Myhill, CMP and Jack Phillips, Ph.D.
 Chapter 45, Determine the Success of your Meeting through Evaluation
 Authors: Monica Myhill, CMP and Jack Phillips, Ph.D.
 Chapter 46, Return on Investment for Meetings and Events
 Authors: Monica Myhill, CMP and Jack Phillips, Ph.D.



Measurement and Evaluation Complete the Planning Cycle

The measurement of objectives and outcomes is only realized through the evaluation step. The evaluation process is extremely valuable and feeds back into the front end of the process by serving as valuable needs assessment activity as well. In addition, evaluation is a key step to assure quality control over programs. Further, evaluation provides timely feedback to speakers.

Myhill and Phillips identify eight reasons to evaluate (Myhill & Phillips, 2006, pp. 692-693):

1. Determine success
2. Identify strengths and weaknesses
3. Compare meeting costs to the benefits
4. Decide who should participate in future meetings
5. Identify which participants were best suited for the meeting content
6. Reinforce major points of the presentation
7. Gather data for future meetings
8. Determine if the meeting was the appropriate solution for the need

A meeting or event is not complete without allowing the participants to evaluate and comment on the experience. Even routine meetings (staff meetings, weekly sales meetings) should go through a review once or twice annually to insure that they are meeting the organization's objectives.

The Pursuit of ROI

Evaluation is based upon six levels of measurement — ultimately leading to Return on Investment (ROI). However, ROI is not the only way to measure the success of a meeting. Meeting managers can evaluate meetings at the following levels:

- Level 0: Statistics
- Level 1: Reaction, Satisfaction and Planned Action
- Level 2: Learning
- Level 3: Application
- Level 4: Business Impact
- Level 5: ROI

When people ask about the ROI of a meeting, they are really asking “What was the value of the meeting?” Meeting professionals banter ROI about as a generic term for meeting value. However, ROI has a specific definition and meaning (Myhill & Phillips, 2005, page 721). When asked to demonstrate ROI, a meeting manager should clarify what stakeholders are looking for. Meeting value can be measured around outcomes that address reaction, learning, application or execution after a meeting, business impact on the organization or return on investment. Generically using the term ROI to define meeting value is like always referring to a photocopy as a Xerox.

Myhill and Phillips make the point that ROI is not a passing fad. In fact ROI has been used as evaluative tool since the 1920's — starting with the comparative evaluation of investments. It is only more recently that ROI has been applied to information technology projects, training, change initiatives and most recently — to meetings.

The pursuit of ROI is really a pursuit towards accountability and quantification of success. Meeting managers can quantify a meeting's success in many ways. Meeting value is created when meeting participants think differently, act differently or have new knowledge after a meeting. Confident and knowledgeable meeting managers should push for clarification when stakeholders demand to know what the ROI for a meeting is.

Upon clarifying what a stakeholder is looking for, meeting managers can work to show the Return on Investment. Or they can demonstrate:

- Changes in behavior
- Changes in learning
- Changes in attitudes
- Application of knowledge or information received in a meeting
- Business impact

Each of these corresponds to one of the six levels of measurement. Measuring changes, application or business impact significantly moves up the chain of impact (Myhill & Phillips, 2006, p. 22). Stakeholders who may say they are interested in ROI, may truly be interested in the amount of learning that occurred or the changes in behavior or improvements in processes back at the job. These types of measure clearly generate more valuable information than whether the room temperature of the meeting room was comfortable or whether participants like the food and beverage served which is Reaction or Level 1 information.

What ROI is Not

Myhill and Phillips argue that meeting managers should not confuse stakeholders by introducing terminology that isn't likely to hold any meaning for the stakeholders (Myhill & Phillips, 2005, p. 712). Don't use ROI where the meaning is *Return on Involvement* or *ROE* to represent *Return on Event* or *Return on Expectations* versus the more common Return on Equity meaning. Also don't create new terms like:

- RAO — Return on Anticipation
- ROC — Return on Communication
- ROM — Return on Meeting
- ROO — Return on Objectives

Where to Start

Evaluation is the process to generate valuable information and feedback. Evaluation starts with the learning outcomes that were established for the meeting. Learning outcomes are nothing more than the call to action underlying the meeting. Why was a meeting necessary? What were participants supposed to do, know or feel as a result of attending the meeting.

Creating good learner outcomes is the secret to easy evaluation. Chapter 20 in *Professional Meeting Management*®, fifth edition, and the PMM5 Postscript™ Number 31 addresses writing good learner outcomes. While there are other “tricks” to writing good learning outcomes as discussed in that chapter and postscript, learner outcomes must be stated in a way that makes them specific and measurable. With those characteristics, the evaluation questions become almost self-apparent. It is, as Myhill and Phillips wrote when they titled Chapter 2 in *Professional Meeting Management*®, “Starting with the End in Mind.”

In addition to starting with specific and measurable learner outcomes, meeting managers can further improve the evaluation process if they:

- **Tie the meeting to organizational objectives.** An organization is not in the business of producing meetings — it produces a good or service. The more a meeting manager can tie the meeting directly to the objectives, goals and direction of the organization, the more successful the meeting will be. And not surprisingly, it will be easier to justify the budget.
- **Move up the chain of impact when demonstrating value.** The ROI Institute defines the *chain of impact* as moving from the subordinate levels of reaction or satisfaction to learning, application or business impact. Meeting manager should move from measuring reaction (How did you like...the speaker, the food, the room temperature) to measuring intended actions (What do you intend to do differently) or learning (What did you learn?) or application (What are you doing differently?) or business impact (How have your new thoughts, attitudes or actions impacted the organization?).
- **Keep metrics customer focused.** Research by the Boston Consulting Group found that “more than 95% of in-house activities (including meetings, and the swapping of email and memos) add little value in terms of the deliverables that make a difference to a customer.”

Whether the customer is internal or external, make the customer the focus of meetings. Meeting managers should help set goals, objectives and outcomes in a way that is customer focused.

- **Make it a team effort.** Most planners understand the importance of setting SMART (specific, measurable, attainable, realistic and timely) outcomes. Ultimately determining meeting value is dependent upon the advance setting of outcomes. Most organizations lack a consistent discipline around setting measurable outcomes and creating plans to determine success (value) against those outcomes for meetings. Part of the meeting manager’s job is to compel stakeholders to define objectives. The lack of organizational discipline around defining what a meeting must accomplish diminishes a meeting manager’s success at demonstrating value.

Define what will be measured and evaluated and the process for doing so jointly with stakeholders. Meeting managers can use the need to measure as an opportunity to expand the team. Meeting managers should not view measurement as solely their responsibility. Meeting managers should call upon other resources within the organization including (potentially) sales, human resources, and information technology. Reach out to ensure that the information required is accessible and reliable.

- **Focus on outcomes.** A meeting’s success will depend upon the call to action — what participants are expected to do, think or know that is different before they came to the meeting. Meeting managers should differentiate between objectives and outcomes. Objectives provide guidance to a process. Outcomes define desired results. Outcomes are what meeting participants “leave” the meeting with. By focusing on desired results, a meeting manager can more easily set up SMART outcomes and ensure that the meeting agenda is driving towards those outcomes.

What to Measure

What are some effective elements that can be measured related to meetings for implementation, business impact, or even ROI? Consider this partial list:

- Sales
- Revenue
- Market share
- Customer referrals
- Sales leads
- Employee/member retention
- Training hours
- Brand development
- Morale
- Motivation
- Public awareness/Public Relations

Always create metrics that apply to the shareholders and develop the measurement plan jointly. In measuring quantifiable results, also document soft or intangible benefits (clear benefits in areas that were not measured).

Reporting Up

Once a meeting manager completes the evaluation process, it is in their best interest to share the results with key stakeholders. Reporting up and out is a strategic step in the entire process. Before sharing information, a smart meeting manager will analyze the information. A meeting manager will ensure that they understand the evaluation data. Check for understanding in the following areas:

- What does the data tell me?
- What were the successes, strengths and weaknesses?
- What will I do differently going forward?

Meeting managers will prepare recommendations and analysis:

- What are the options or choices?
- Which options are most attractive in terms of risk and reward?

Meeting managers should tailor (not subvert) information based upon who is reading the evaluation results. Senior management operates under the mindset “I have five minutes, what do you want me to know?” Use an executive summary to demonstrate meeting results to them.

Pitfalls

The largest single mistake meeting managers can make regarding evaluation is not doing anything. Without support or the request for ROI from meetings, many meeting managers can fall into the trap of passivity — not focusing on the need to analyze and report on meeting evaluation results. Evaluation represents an opportunity for meeting managers to operate more strategically, increase the perceived value of their positions and command the attention of management.

Meeting managers should keep in mind the following pitfalls about meeting evaluation:

- **You can't analyze what isn't captured** — Make evaluation a standard step in the meeting planning process.
- **Data does not equal information** — Interpret and analyze the results so it is meaningful to the stakeholders.
- **Know your internal customer** — Tailor information based upon the stakeholder group and their desired level of information.
- **Don't look backwards** — Create a measurement plan for all meetings to avoid being asked to demonstrate the meeting's worth after the meeting is completed.
- **There is no magic bullet** — While measurement and evaluation is a standard process, the answer of "what to measure" does not come through a checklist. Measurement represents an opportunity for meeting managers to dialogue with stakeholders and add value to the process of meeting planning.

Feedback is a Friend

Whether a meeting manager is minding and growing their own business or advancing their career, receiving feedback is the best way to learn how one is doing.

Gathering and reacting to feedback is an invaluable marketing tool. It can help turn clients into valued partners. It can help improve services and delivery. Feedback helps identify what is important to customers.

Meeting managers can benefit personally and professionally from evaluation. Good feedback allows meeting managers to:

- Use evaluation results to bolster your career and credibility within the organization.
- Evaluate meeting planning processes and results.
- Evaluate, reconsider, modify and stay on track to success.

Summary

In today's environment, management is looking at what provides strategic value to their organizations. Meetings and events are falling under additional scrutiny. Meeting managers should embrace measurement and evaluation as a cyclical process to their planning efforts. Relating objectives and outcomes to results allows for analysis, improvement and upward communication.

A push for a more disciplined approach to measuring meeting results that are tied to business issues will garner additional respect for the profession and the value of the meetings planned. Meeting managers can embrace all levels of measurement and work towards moving up the chain of impact to provide stakeholders with information that is meaningful to them and the organization.

Group Discussion or Projects

1. How does evaluation help a meeting manager perform his/her responsibilities?
2. Should all meetings be evaluated, including everyday meetings like staff meetings or weekly sales meetings? Why or why not?
3. What do you see as the major challenges facing meeting managers around evaluation and measurement?
4. A benchmark is defined as a standard used for comparison. How can evaluation help a meeting manager benchmark?
5. If a meeting evaluation results are disastrous, what are the advantages of sharing the information with management and other stakeholders?

References

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Copies of *Professional Meeting Management*®, fifth edition, may be purchased through the PCMA Bookstore at [PCMA Bookstore](#) or http://www.pcma.org/store/index.asp?DEPARTMENT_ID=3

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