



The Event Engagement Data Playbook

How to Drive, Capture and Act on Attendee Engagement Data for Your Virtual, Hybrid and In-Person Events



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I. Intro:

Connecting Events to Results

Engagement plays a central role in events for multiple reasons. On one level, it transforms a webinar, conference or tradeshow into an interactive experience – creating an opportunity for attendees, hosts and sponsors to create connections and build relationships. Often, **this is what determines the difference between a memorable event and a forgettable one** – and compels attendees to return for future events.

On another level, attendee engagement offers businesses the rich and unique insights necessary for building relationships with customers and prospects.

Capturing event-based buying signals is critical to determining prospect and customer intent, which can

improve subsequent communications and personalize event experiences. Mapping those insights to what you already know about your attendee's buying journey can create more meaningful interactions, plus greater efficiency and velocity of your revenue-generating efforts.

There's a reason why **49%** of marketers point to audience engagement as the biggest contributing factor for a successful event – because above all, event engagement is the key to unlocking your event ROI. The more engagement data that you are able to capture, the greater the insights you have to power your marketing efforts and nurture leads down the funnel.

This playbook will offer you a series of tips and best practices to help you drive, capture and act on the valuable attendee engagement data generated from your events – **and help you connect your events to measurable business results.**

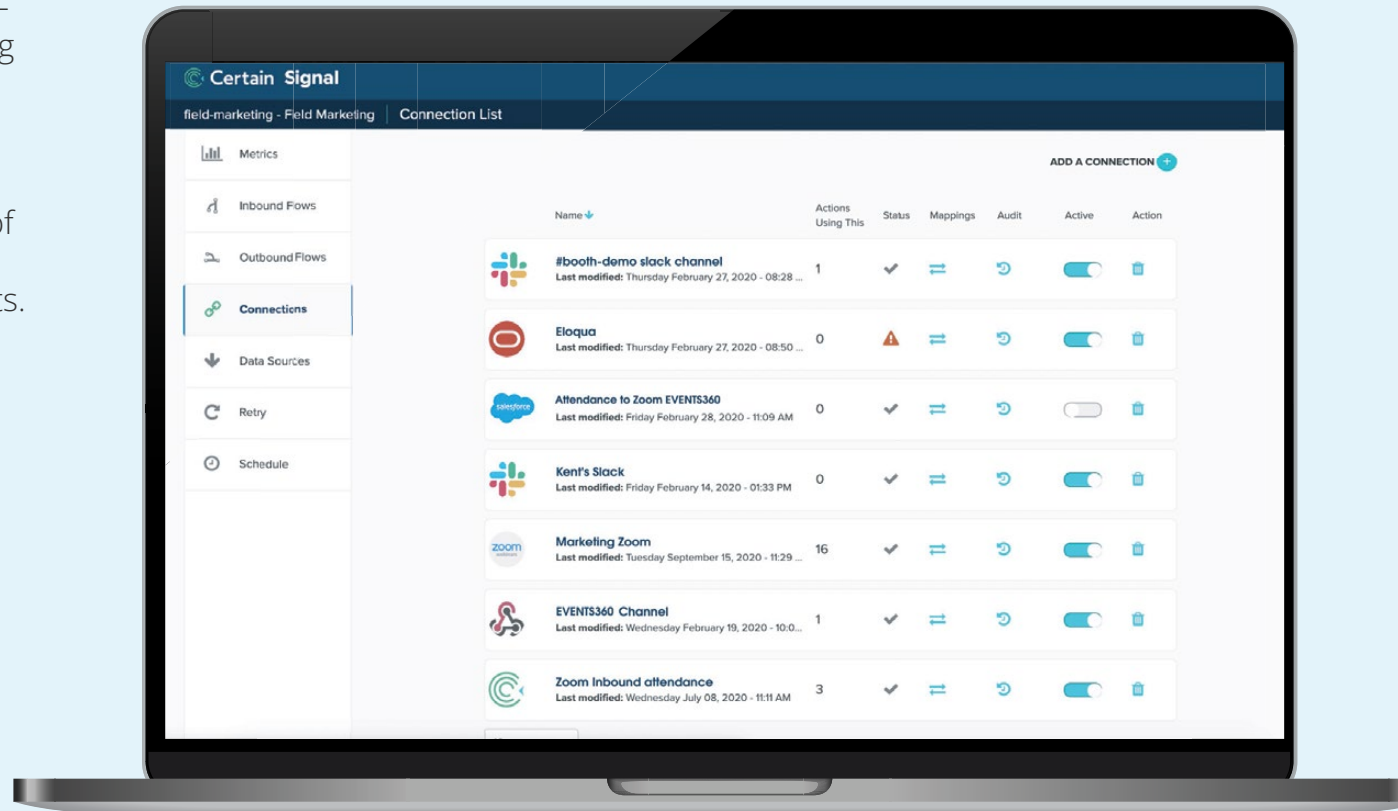
The Importance of Integrating Your Event Data

While events are expanding across the virtual, in-person and hybrid spectrum, marketers are tasked with efficiently collecting and managing a complex multitude of data across all event types.

To make the most of your prospect and customer insights, your attendee engagement data must be integrated and shared across all of your systems—CRM, marketing automation, webcasting and event platforms.

With a single view of your attendees' data, you can create an integrated, seamless, and more impactful stream of communication to your customers and buyers across channels and touchpoints.

Learn more about Signal, Certain's real-time event data platform and winner of the 2020 American Business Award for Best New Product - Event Management.



II. PRE-EVENT: Planning

Regardless of when, where or how your event is taking place, planning an engagement strategy that aligns with your event goals is a crucial step in the **pre-event phase**.

Whether your aim is to promote your brand, attract new prospects or educate your audience, without a plan for how to engage your attendees – you miss the opportunity to build relationships with your customers, prospects or partners that could ultimately drive pipeline for your business.

Here are a few key steps to consider during the pre-event planning phase to help maximize your engagement strategy:

Step 1: Identify your Target Attendees

Determine who your ideal attendees are in order to understand their needs and pain points – and what will drive their interest in attending your event.

Make sure you have a clear understanding of your target attendees' profile, and create a unique event brand that is compelling to those you want to attend. Ask:

- Which target accounts – and what roles within those accounts – do you want to attend your event?
- What specific content and session categories should be developed to inspire the accounts and/or roles that you've identified?



Step 2: Build an Online Community

Leverage custom hashtags and send direct messages on social networks to create a dialog with attendees leading up to the event. This is one way to measure engagement from your event—attendees posting about your event, event hashtag trending, or event content being shared and retweeted.

If you're hosting a digital or hybrid event, share a custom event background for speakers to use during their presentations (one that includes your event brand and hashtag). Ask them to take a screenshot with their background and share on social media to help build buzz.

For in-person and hybrid events, create Instagram-worthy opportunities (backdrops, installations, headshot services) for attendees to share on social. Create a **badge** in your engagement app for social media shares and posts to your activity feed for added participation.

This type of community-building will help to drive greater engagement and activity from your attendees before, during and after the event.



Remember: Interactivity is key when it comes to driving attendee engagement.

Plan for interaction between guests, speakers and sponsors throughout your event. This will elevate the experience from a passive (and possibly forgettable) event to a memorable and engaging opportunity for attendees to connect.

Step 3: Drive Attendee-to-Attendee Interaction

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Design Networking Opportunities:

Expanding professional networks is a major reason people will want to attend your event, so don't overlook this element when designing your event experiences. Whether your event is physical or digital, consider employing an event engagement app to facilitate a networking environment where both audiences can engage. On that note...

Connect In-Person and Online

Audiences: When events go hybrid or involve some blend of in-person and digital audiences, provide ways for those audiences to connect with one another. This will help unify the experience for both audiences and allow for greater community engagement.

Polls, discussion boards, activity feeds and badge games are a great way to connect your audiences, no matter where they're attending from.

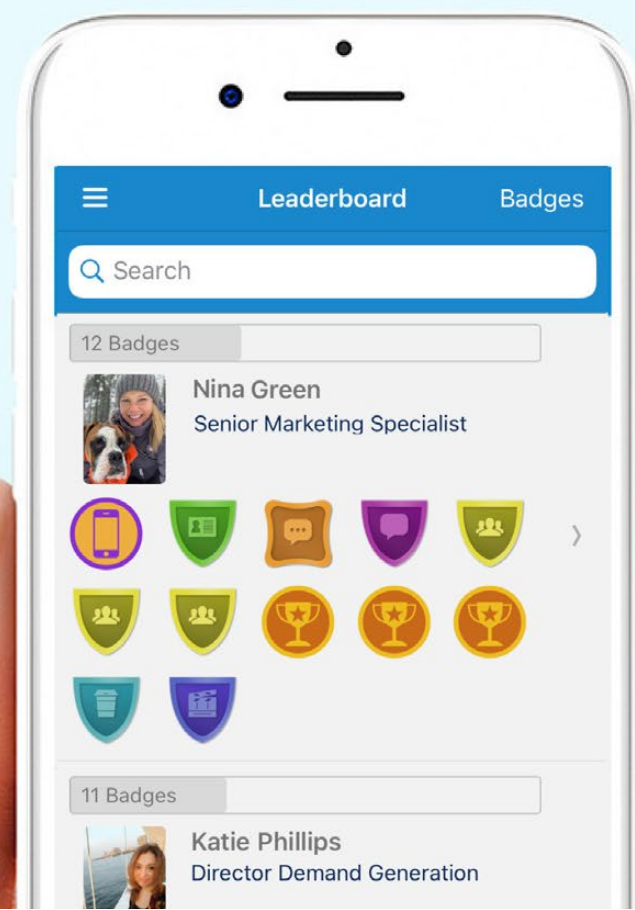
Step 4: Plan for Ways to Gamify Your Event

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By gamifying your event, you give audiences the opportunity to move from passive attendee to active participant. Using tactics such as badge games (where attendees are awarded "badges" or points for engaging in polls, surveys, Q&As, discussion boards, etc.) not only drives engagement but also gives you insight into your attendees interests, pain points and motivations.

Consider using a badge game to drive more engagement for your sponsors and exhibitors by awarding a badge for each sponsored session or booth visit. By incorporating a badge game into their program, Oticon saw **record-high** booth check-ins for their events.

Check out [this blog](#) for more ideas on how to gamify your next event through activities including trivia, scavenger hunts and more.



Investing in Event Engagement Technology

With more than **50%** of marketers pointing to attendee engagement as their biggest challenge when it comes to events, investing in the right technology to drive and capture engagement has become a must.

Event Engagement Tools:



Registration

Use the registration experience to capture more than just typical demographic information. Ask additional questions to find out key areas of interest and motivations for joining your event. Use a registration technology that can provide custom questions based on attendee type.

- What do you want to know about your attendees?
- How much of this can you learn from the start to help personalize the attendee experience?

Leverage a registration experience that includes logic-driven forms (i.e. different questions and/or information is revealed based on answers to prior questions) to inform tailored content and session recommendations that meet the unique interests of your attendees.



Engagement App

Remember, interactivity is the key to rich and memorable attendee engagement. With **78% of businesses** reporting that use of an event application contributes to a positive event ROI, consider investing in an **event engagement app** that can facilitate activities such as:

- Q&As
- Polling/Surveys
- Gamification
- Discussion Boards
- Activity Feeds
- In-App Messaging



Digital Content Hub

Whether attendees are joining online or in-person, it's important to offer a central digital location for them to access your event content and sessions.

Through a digital content hub, you can provide attendees with easy access to your live or on-demand session links, and content including presentation slides, handouts, videos and more.

Ideally, this is also where you will provide important details such as session and speaker information, with respective join links and content made available within each listed session. Syncing this information with your engagement app allows attendees access from anywhere, anytime.

By offering a central digital location to access event content and sessions, you not only provide a seamless experience for your guests – you also enable a wealth of insights as attendees engage with your digital content hub.



Lead Retrieval

For hybrid and in-person events, give your sponsors and exhibitors the option of using a scan and capture feature for gathering sales leads for post-event follow up. They can scan an attendee's badge within seconds, quickly add notes and a rating to qualify the lead right after they've met.



Data Capture & Integration

Chances are that you'll be using multiple technologies for your event, so make sure you have a solution to unify and aggregate the engagement data you collect from your events. You've invested so much of your time and resources into capturing valuable insights from your customers, partners and prospects – don't let that go to waste by failing to integrate your events, sales and marketing technologies!



To help sales in outreach prior to an event, leverage a **meeting scheduling technology** so your sales people can connect the right prospects with the right executives for 1:1 meetings.



Production Capabilities

One last tip to keep in mind as you evaluate your event engagement technologies: **treat your event like a production.**

How do you keep and maintain people's attention and be visually appealing (e.g., lighting, camera quality)? Small details go a long way, particularly when it comes to battling screen fatigue.

Consider the ways that you can improve the experience through your event production, no matter what your budget or venue.

For example:

- **Large Event & Budget:** Partner with a production studio or agency to help elevate your live, virtual or hybrid event experience.
- **Medium Event & Budget:** Invest in a production kit with a high quality camera and microphone for speakers and moderators. Design a branded virtual background for virtual presenters.
- **Small Event & Budget:** Send virtual speakers and moderators a ring light and microphone kit to improve sound and light quality (if needed). Design a branded virtual background for virtual presenters.

Sponsoring an Event?

For those events you are sponsoring, get a list of expected companies from the show's organizer, if possible. Build a list of prospective attendees from each of those companies and similar companies.

Target those you'd like to work with or learn more about and send them an invitation to visit you during the show. Include your booth number, or info on where they can find you on the virtual event website, but more importantly, give them a reason to visit. What can you offer them to make it worth their while, to pique their interest?

With more attendees now working remotely or from their own homes, sending physical direct mail or incentives has become more challenging. Consider:



Going Digital:

Send a gift card or digital incentive that can be delivered via email.



Opt-In/Out:

Send an email giving your attendees the option to provide you their mailing address in order to receive your physical incentive.



Go Hybrid:

Have a digital option for those who opt-out of sharing their mailing address, and physical option for those who opt-in.

Incentives

The right incentives can help increase attendance, one-on-one meetings, and drive traffic to your booth or any sessions you're presenting or sponsoring. Incentives can be effective for driving this type of engagement, but they take some thought.

When considering incentives, think about your target audience and their pain points. Should you be spending money on a fun game with your company logo? Or would more targeted visitors be drawn to your booth if you offered a 15-minute free consultation or a how-to guide related to your industry?

III. DURING THE EVENT:

Engagement in Action

Step 5: Put Your Plan Into Action

Once your event kicks off, you can now put your engagement plan into action. Start by reminding your attendees in advance of all the various ways that they can connect and interact throughout your event. Send a reminder email with clear information and instructions on how to access your engagement app, when and how to connect with speakers, sponsors and attendees, and how to get in touch throughout the event.

During the event, use the check-in process to find out more about your attendee's preferences and interests. For virtual or hybrid events, this will mean tracking when attendees join or drop from online sessions. The more data you can collect on your attendees pre and during the event, the better you can personalize your outreach to them.

For example, if you are able to identify what sessions a VIP prospect is attending, you can send him or her an email in real time with an offer or message relevant to the sessions they've recently attended. After all, personalized follow up is what will help you drive exponential results. Per research from the Corporate Executive Board cited in Harvard Business Review, "Individual customer stakeholders who perceived supplier content to be tailored to their specific needs were **40%** more willing to buy from that supplier than stakeholders who didn't."

Capturing a holistic view of your attendees ultimately allows you to tailor your outreach with relevant and timely offers to your most important guests.

IV. AFTER THE EVENT:

Keep the Conversation Going

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When planning your engagement strategy, a common pitfall is avoiding the post-event engagement strategy. Follow-up emails or direct messages with calls to action, or even recap posts from events are important steps in keeping the event—and your brand—alive in the minds of attendees, as well as accelerating sales cycles.

Put the insights you've collected to good use and arm your teams with email templates they can personalize to send to their most important customers and prospects after your event has ended.

Lastly, you can share insights gleaned with your shareholders or board as evidence of the value of your events.

Step 6: Measure Engagement

Metrics pulled from your event technology solution(s) after the event will not only allow you to measure the success of your event and engagement strategies, they'll also help optimize future events, increase customer/prospect intelligence, and give you a clear measure of your event ROI.

Defining your metrics for success will change depending on whether your event is fully digital, hybrid or in-person. **Consider these engagement metrics to help measure the outcomes of your event:**

Post-Event Survey

How easy was the overall accessibility of the event?

★★★★★

What were your favorite experiences or moments during the event?

The interactive speaker Q&As

Did the session meet your expectations and fulfill the reason you wanted to attend?

☒ Yes
☐ No

How satisfied were you with the networking opportunities available during the event?

★★★★★

What topics and experiences would you like to see covered in future #EVENTS360 sessions?

Engagement Metrics:



Metrics	Virtual	Hybrid	In-Person
Event Attendance:			
• Registered vs. Attended	✓	✓	✓
• Live vs. On-Demand	✓	✓	
• In-Person vs. Virtual		✓	
• # of Attendees from Target Account List	✓	✓	✓
• # of Customers who attended	✓	✓	✓
Session Attendance:			
• Join & Drop Times	✓	✓	
• Check-In data		✓	✓
Event App Downloads	✓	✓	✓
Event App Engagement			
• Games, Polling, Activity Feeds, Discussion Boards, Q&As	✓	✓	✓
Survey Feedback	✓	✓	✓
Sponsor Engagement			
• Lead Retrieval		✓	✓
• Booth Visits	✓	✓	✓
• Sponsor Ad Clicks	✓	✓	✓
Meetings Scheduled with Prospects and Customers	✓	✓	✓

Step 7: Use Engagement Insights to Inform Personalized Follow-Up

Now that your event has ended, compare the data you've collected from this event to your last event – what learnings can you take away? How do attendee engagement behaviors differ based on the event format, and how can this inform your future events?

Hone in on repeat attendees and evaluate how their intent or interests have changed – what does this tell you about not only their own motivations, but their company's potential pain points or interests as well?

Balance what users told you prior to the event with what they actually did—what they attended, downloaded and said in live polls or on discussion boards. This will allow you to develop more rounded profiles of your clients, and to target follow-up messaging and offers based on those profiles.



Package the attendee learnings that you've gathered throughout your event into a summary of insights for your sales team (sessions attended, questions asked, levels of engagement, etc). Next, develop personalized communication templates for sales based on these learnings so they are armed and ready to engage the moment your event has ended.

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Step 8: Follow Up with Sponsors and Exhibitors

After your event has ended, circle back with your sponsors and exhibitors. The success of your badge game, lead capture and in-app ads means that your exhibitors are more likely to return next year, having seen a healthy return on their investment. Share with them what you've learned and strategize for an even more productive future. Encourage their feedback throughout—they're pros too; take full advantage of their expertise.



If you're running an ABM strategy, create a high-level overview of account engagement to help inform and develop your strategy, and to identify warmer leads from your events.

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Step 9: Drive Pipeline and Measure Event ROI

In order to analyze and report on the success of your event, measure the metrics described in Step 6 against your pre-defined event KPIs – how do they compare? Have your goals for event engagement been met? Incorporate these learnings into your post-event evaluation, and future event planning.

Using the engagement data you have collected during your event cycle, you can begin to build out various nurture tracks based on your attendees' primary interests, then assign prospects to their respective track based on how they engaged.

A month after the event you should have, at minimum, qualified all the leads you captured and placed them in the appropriate stage in your pipeline. Be sure to distinguish between MQL and SQL. Many of the leads may go right into a nurture track. Some will require further qualification, and others may be actively engaged on a short path to purchase. But you should have an idea of pipeline expectations in the next few months.

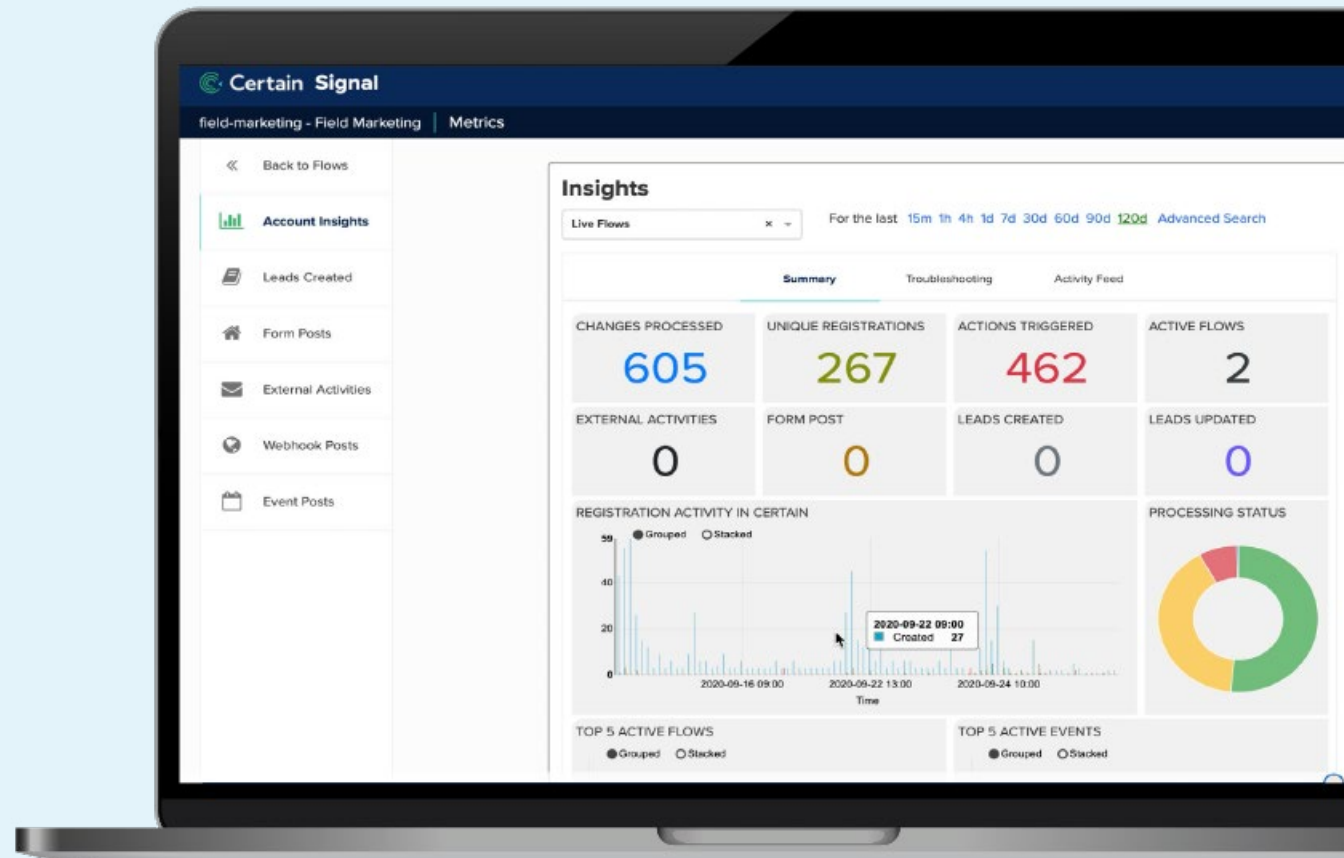
Engagement Data Drives Business Results



Whether your event is virtual, in-person, or a blend of both, a successful engagement strategy is the most powerful resource you can have for maximizing the high returns that events can deliver to your business' bottom line.

The valuable data collected before, during and after your event leads the way to meaningful engagement with prospects and customers. A deeper understanding of your attendees' goals and interests enables sales and marketing to better plan for the conversation.

It's this act of heightened engagement that ultimately drives pipeline.



Are you looking for ways to optimize your event engagement strategy?

Contact us today for a free consultation with one of our event experts:

LET'S TALK



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“Ultimately, building relationships with attendees is what drives business results – so to form an effective event strategy, focus on a foundation of **human engagement and connection.**”

– Peter Micciche, CEO of Certain

About Certain

Certain provides the leading end-to-end event experience platform for data-driven marketers and event professionals. Our software empowers marketers to deliver truly engaging digital and in-person attendee experiences, capturing rich insights and buying signals that lead to greater sales and marketing results.