



The Event Marketing Playbook: Metrics & Data

Events represent one of your biggest marketing expenditures and if executed well, they can also deliver some of the highest returns to the business. To help you maximize the ROI from your events, this playbook pulls together B2B event marketing best practices specific for your metrics and data strategies—complete with specific recommendations, tactics and more to streamline execution and improve results.

How to Use This Playbook

Look for these icons to get ideas to help you take your specific event type to the next level.



Conferences



Field Events



Partner Events



Summits & Tradeshows



This playbook is part of [The Event Marketing Playbook](#)—a full guide highlighting 8 key event strategies to get you where you want to be faster.

Metrics Strategy

Tracking key metrics around demand and pipeline creation is important to showcase how events deliver on overall business goals. Too often, planning for how to measure event results comes up after the fact. When all is said and done, someone asks if it was worth it. Well, was it? And by whose definition?



Measuring engagement and business revenue from your next event starts well before you get there. Here are a few tips to do it right the next time:



1

DEFINE CLEARLY WHAT SUCCESS LOOKS LIKE FIRST

There should be a sales or marketing objective independent of the event that is different from your pre-show expectations. The event, after all, is just a channel. So, why are you doing it in the first place? Is it about sales? Awareness? Satisfying a partner relationship? Know the objective upfront, then decide what success specifically looks like—and how you'll measure it.

2

ESTABLISH IMMEDIATE AND LONGER-TERM MEASURES OF SUCCESS

Whether it's brand awareness and generating leads, or business opportunities and closed sales, set both short and long-term expectations and establish post-show milestones for evaluating effectiveness. Define these measures upfront and drive your strategy and execution accordingly. Possibilities include net new leads, quality of leads, invitees vs. registrants (meaning how many people did you invite who registered), and how many actually showed up.

3

PLAN YOUR POST-EVENT ACTIVITIES BEFOREHAND

It's highly likely that event results are contingent on significant post-show activity: lead follow-up, the sales team following through on commitments they made to prospects at the booth, etc. Have a post-show plan to make sure this follow-up and lead nurturing happens quickly and efficiently.

4

KNOW HOW YOU'LL MEASURE 30 DAYS AFTER

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.

5

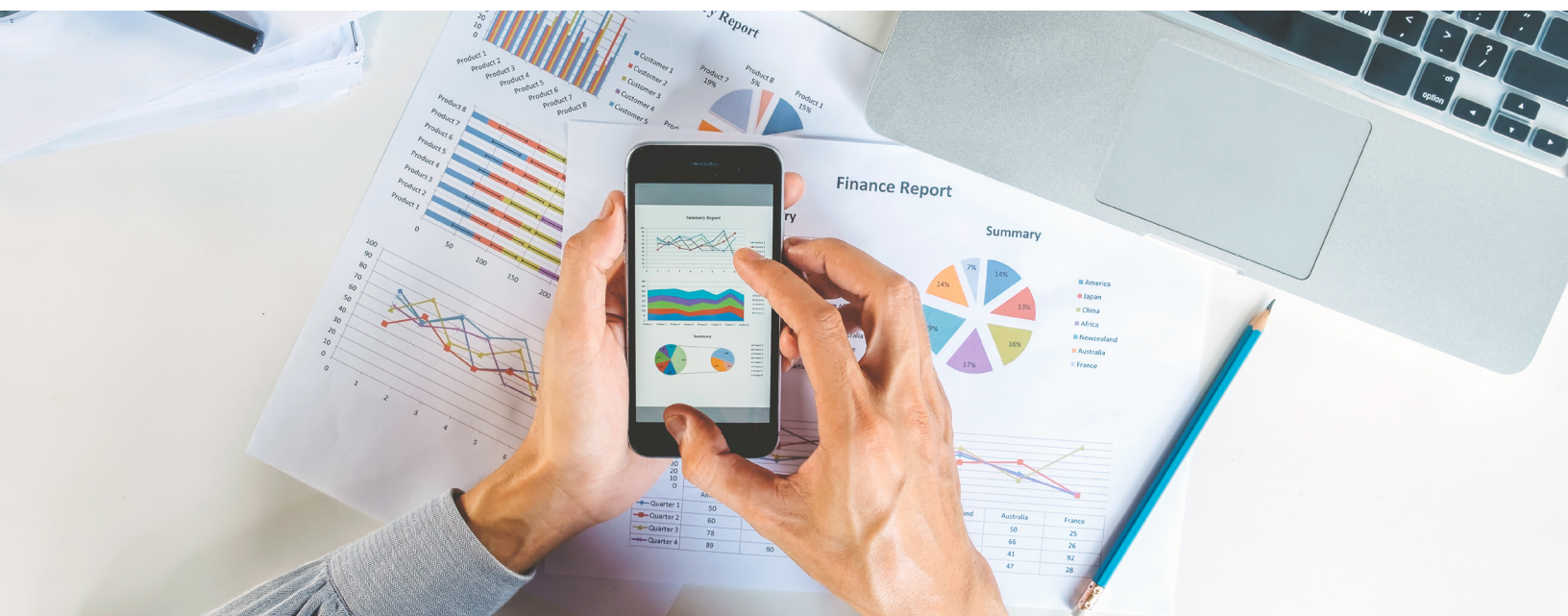
KNOW WHAT YOU'LL MEASURE SIX MONTHS AFTER THE SHOW

Depending on your average sales cycle length, this is the milestone at which you should start to expect closed business, booked sales and revenue recognition directly from the event. There will still be leads you're nurturing, but six months should be enough time to see closed business and a solid pipeline of expected new sales in the subsequent six-month period.

6

MEASURE AND TRACK PROGRESS TO GOALS REGULARLY, AND MAKE SURE YOU HAVE THE TECHNOLOGY

Set up weekly meetings to review the metrics with your team and identify areas to course correct if needed. With the investment you put into the event, you'll need to also be able to clearly update your executive team on how you are progressing as well as how you did post event. Make sure you have ample qualitative and quantitative data to provide a full view of success.



Metrics - Take it to the Next Level



Conference

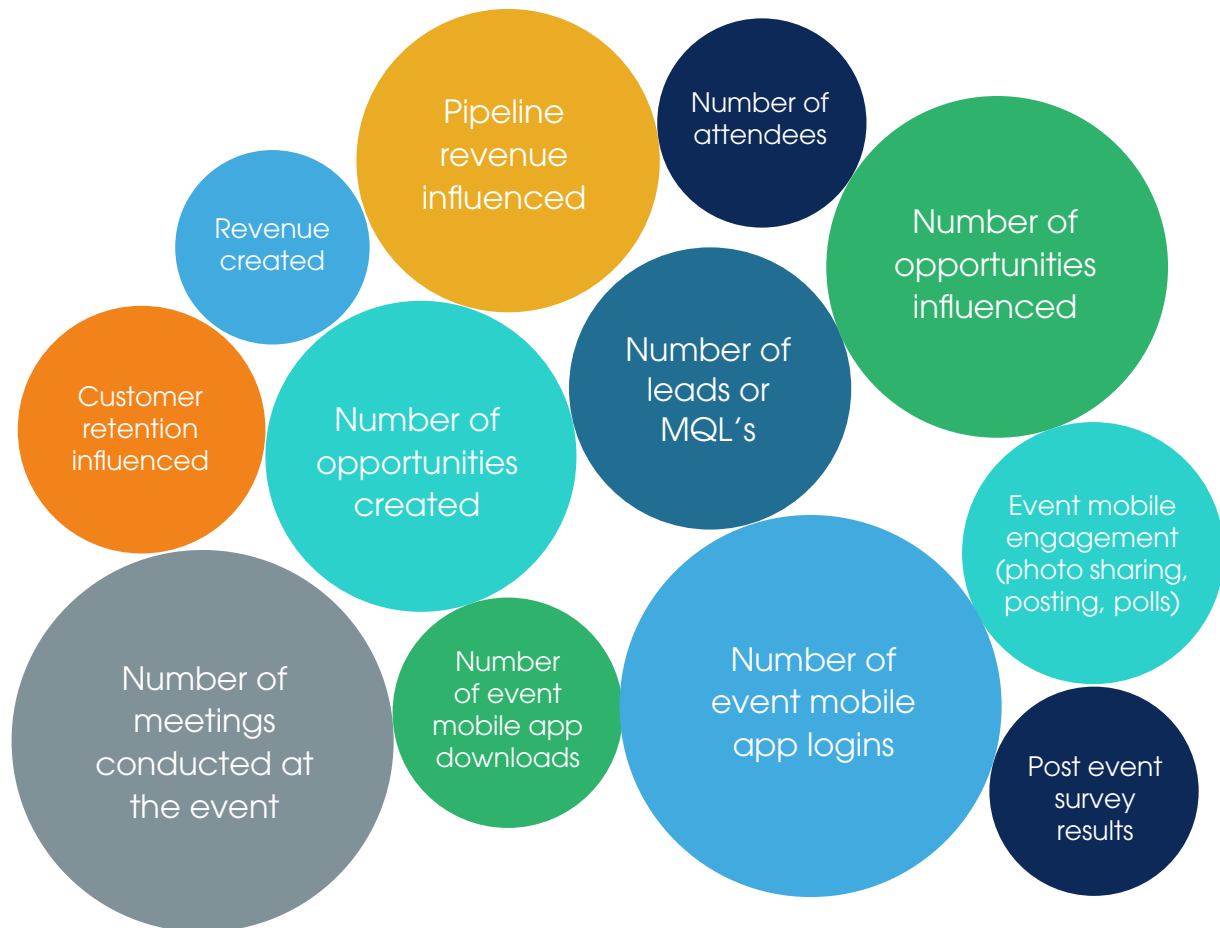


Summits & Tradeshows



Partner Events

Typical measures of event success include:



Establishing a comprehensive metrics strategy is the key to measuring ROI for your events. But without quality data to inform those metrics, marketers are missing an essential piece of the puzzle.

Valuable data collected before, during and after your event leads the way to meaningful engagement with prospects. 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.

Data Strategy

Data is the secret weapon behind some of the most successful B2B marketing campaigns, and it can also be the silent killer of great campaigns otherwise destined for success. But the amount of data you collect is only the beginning...

To ensure that you are tapping into quality data, it's important that you are:

- ▶ Gathering the right data and intelligence that is relevant to your customers' best interests
- ▶ Mobilizing that data as part of personalized but scalable campaigns that break through the clutter and make an impact



Capturing event-based buying signals is critical to determining prospect and customer intent, which can improve subsequent communications and also personalize event experiences. Mapping those insights to what you already know about the customer's buying journey can create more meaningful interactions plus greater efficiency and velocity of your revenue-generating efforts.





Data Integration

To make the most of your data and customer insights, that data must be integrated and shared across all of your systems—your CRM, marketing automation and event platforms. With a single view of your customer's data, not only can you improve critical compliance issues (GDPR anybody?), but also create an integrated, seamless and more impactful stream of communication to your customers and buyers across channels and touchpoints.

While events are an interpersonal activity, there is untapped opportunity to capture data on your attendees pre, during and post event:



Before the event, in the course of registration, look to capture more than just typical demographic information, such as key areas of interest.



During the event, use the check in process to find out more about your attendee's preferences and interests.



After the event, use the data collected during the event cycle to personalize your follow-up outreach to attendees.



Data in action:

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.

Data - Take it to the Next Level



Conferences



Summits & Tradeshows

Quality and Speed

Two things matter when managing data for events: quality and speed. No matter the type of event, you want to gather event attendee information to feed your demand generation engine. Beyond the basics (name, title, etc.), the more intelligence you can gather about the prospects or customers at the event, the more effective your sales team's follow-up efforts.

Use the list below to ensure you are gathering as much intelligence as possible to fuel your sales process.



Quality

Attendance

- ▶ Which parts of the event did the lead attend?

Engagement

- ▶ How long did the lead attend each talk/workshop?
- ▶ What questions did the lead ask?
- ▶ What pain points did the lead express?
- ▶ What initiatives are underway that your product could address?
- ▶ Did the lead respond to any polling or surveys?
- ▶ Did the lead show any additional engagement through your event mobile app?





Speed

The **2018 B2B Event Marketing Report** found that more than half of B2B professionals experience an ineffective hand-off of leads from the event to sales. When leads are either lost or inappropriately assigned to sales, it hinders marketing's pipeline accountability, prevents the sales team's ability to close deals, and affects the likelihood of future events.

To ensure a smooth and efficient handoff, be sure to:

- ▶ **Ensure data gathered at the event can be mapped to unique fields in the CRM and marketing automation.** Avoid using a description field which cannot be easily referenced by a rep.
- ▶ **Automate the lead to sales handoff process.** Sales should be able to follow up with leads within 24 hours if leads are automatically routed from your event management software to CRM and marketing automation.
- ▶ **Create lead assignment rules consistent with existing rules.**
- ▶ **In advance, build consensus with sales on qualifying criteria for “hot” leads.**
- ▶ **Personalize the follow up.** With the data you've collected before and during the event, you should have a good understanding of what content and message might be most relevant to that lead. Your attendee will appreciate the personal touch.



2018

B2B Event Marketing Report

DOWNLOAD





Use every opportunity you can to capture additional data on your attendees.

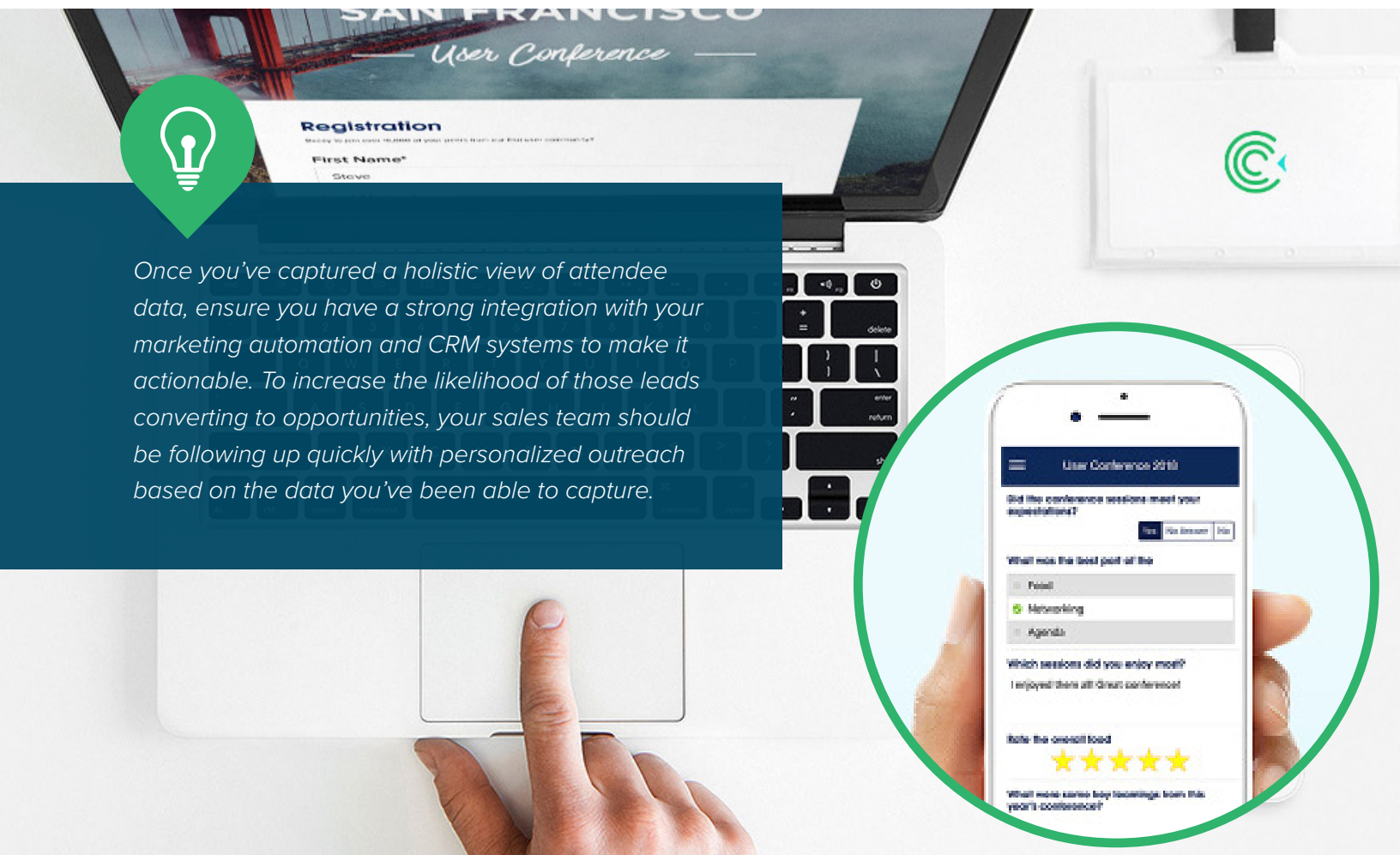
The registration process allows you to ask an additional question or two for better understanding of interests and reasons for attending the event:

- ▶ What are your favorite social media outlets?
- ▶ What do you hope to experience or learn at this event?

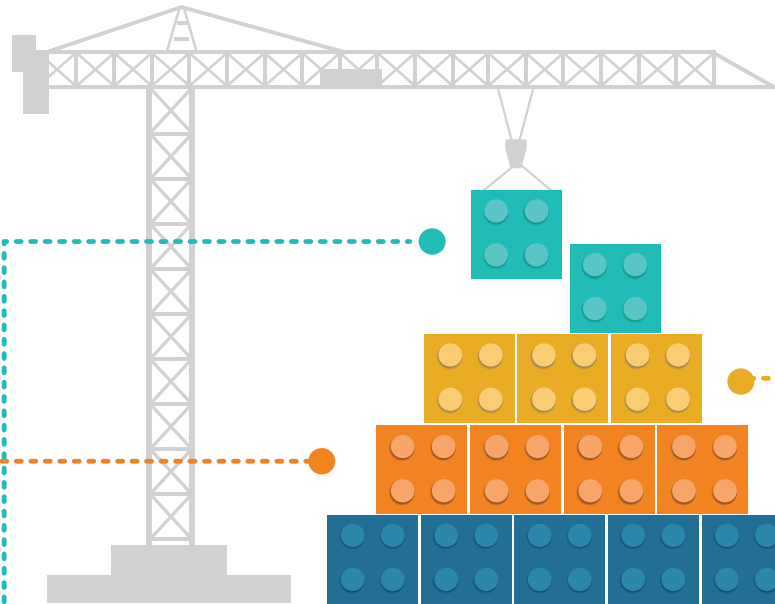
Upon check-in, gather additional intelligence on specific interests:

- ▶ What panel, speaker or session are you most interested in hearing or attending?

Encourage your attendees to engage through the event mobile app, and collect data from polling, surveys and discussion boards through the app. Behavioral insights, as well as direct feedback, gathered from your attendees can reveal interest, concerns and pain points.



DATA AS THE BUILDING BLOCKS FOR CUSTOMER LOYALTY

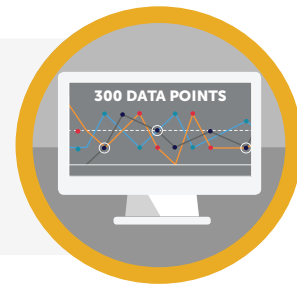


01 CAPTURE

Event attendees have the potential to be great sources of information before, during and after an event. With event automation technology, marketers have the power to collect those insights. Tracking attendees' journeys, from which sessions they visited to the real-time survey feedback they provided, gives marketers a closer look at specific preferences and provides a roadmap to deeper engagement with those individuals.

02 TRANSFORM

Attendee data gathered at events tells a business not only who to target, but how to target him or her. Once attendee data is captured, marketers must turn those insights into strategic action. After all, collecting data and effectively using that data to drive business results are two different things.



03 UNDERSTAND

Your customers know when they are being treated as one in a bunch. Post-event email blasts that are generic and include non-personalized calls to action won't show your attendees that you truly understand them – or want their business. Marketers can create highly personalized content by utilizing data captured at the event, including what booths an attendee visited or how he or she rated a keynote presentation. Gathering data and using it effectively ultimately creates a more genuine follow up.



Use of the power of events combined with metrics and data for building relationships with your key target audiences and driving business results.

About the Authors



Certain is the leading enterprise event automation platform that helps data-driven marketers and event professionals integrate rich buying signals and attendee insights into cross-channel marketing campaigns to improve sales and marketing results. Certain partners with hundreds of companies across tens of thousands of events with millions of attendees. Headquartered in San Francisco, with offices in Chapel Hill, NC, Europe and Asia Pacific, Certain serves enterprises across tens of thousands of events with millions of attendees to deliver flawless events.

Visit Certain on the web at www.certain.com and follow us on Twitter [@Certain](https://twitter.com/Certain)



Every day at Heinz Marketing brings a new adventure in the world of B2B sales and marketing. We are innovators at heart, and not afraid to challenge convention in order to deliver the results our customers need. We are passionate about what we do and strive to promote outcomes rather than just focus on activities.

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