

We Have To Stop Meeting Like This

by Patti Phillips, Ph.D.

A few months ago, I had the opportunity to attend a learning and development industry conference that included speakers on the usual topics of e-learning, performance consulting and various types of training. During the event, I found measurement is one subject that remains at the forefront for learning professionals.

In one of my sessions, a participant asked, “Shouldn’t the provider of this conference conduct an ROI on this conference to ensure that we (the participants) are getting value? We spent a lot of money to participate. Shouldn’t they want to know if we are getting a benefit?” How would someone in my position respond?

Well, yes, they should. But shouldn’t the organization that sent the participant be interested enough to require it?

Organizations are beginning to require evidence of results from all types of meetings and events, including large conferences. As with learning events, success requires not only that the conference provider pay attention to results but also that sponsors are engaged before, during and after the event.

Investment in Meetings and Events

Recently, there has been a movement in the meetings and events industry toward accountability, particularly toward calculating the ROI. This is not surprising, considering what is spent in the industry. It boasts \$150 billion in North America alone, said John Caparella, Gaylord Hotels executive vice president and chief operating officer. Compare this with Singapore’s annual gross domestic product (\$133 billion), annual spending on employee learning in the United States (\$109 billion), the motion picture industry’s annual worldwide box office revenues (\$23 billion) and 2005-2006 revenue generated for the United Way, including individual and corporate giving, as well as government grants (\$3.63 billion). [Figure 1](#) compares investments in meetings and events with other investments.

The investment in meetings, conferences and major events is enormous. The question is, “Why?” What do sales meetings, major conferences and team meetings contribute to the sponsoring organization and other stakeholders involved?

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The Value of Meetings and Events

The move to show the value of meetings and events is picking up speed. Meeting Professionals International (MPI) is leading the charge to help professionals develop capacity in measurement and evaluation through workshops and publications.

The Professional Convention Management Association (PCMA) is pushing the issue with associations. Case studies are being developed, demonstrating the variety of meetings undergoing the same level of scrutiny as learning processes. Meetings and events are considered learning opportunities, and meeting planners in particular perceive them this way. They think participants can acquire information, change their attitudes, meet people and, with any luck, develop ideas that can be applied on the job as a result of the meeting.

To ensure these outputs are occurring, measurement and evaluation are taking place. It is no longer enough to say, "That was a great conference."

Whose ROI?

The challenge for large meetings and conference providers is defining whose ROI to measure. For the typical large organization sales meeting, for example, the ROI targets what the organization expects. But for large conferences, the stakeholders vary. For example, consider the conference I just attended. Who made the investments? There were:

- Participants (or the organizations that sponsored them).
- Speakers (who tend to fund themselves).
- Exhibitors (who purchase floor space in the expo).
- Sponsors (which provide advertising).
- Bookstores (which purchase books for resale).
- The organization that holds the conference.

Determining the benefit and ROI to the conference provider is easy, and it isn't new. The conference provider simply compares the costs of the conference with the revenue (profit) generated from participant registrations, exhibitor fees, sponsor fees and any take on the bookstore.

Of course, throughout the conference, this individual also gathers data on sessions to ensure participants are gaining what they need for the conference and can adjust for the next year based on this feedback.

What is missing, however, is the ROI for those who make the conference successful, particularly the participants and the organizations that fund their trip.

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The Chain of Impact

As with the learning process, a chain of impact occurs as participants attend a meeting or large conference. They first react to it and then acquire knowledge and information, apply that in their job and, as a result, positively influence business measures. The approach used to measure the success of a learning program directly applies to meetings, events and conferences.

All evidence indicates value exists in investing in participation in meetings and events. The value is not always reported, however. A “great” conference is perceived much like a “great” learning program — virtually meaningless unless “great” is defined by results.

An Answer to the Call

A plethora of solutions to the meetings-and-events call for accountability is surfacing, ranging from workshops to publications to technology. Organizers are building capacity in measurement and evaluation — they are learning how to calculate ROI.

Conference providers are enlisting the help of technology leaders to incorporate data-gathering systems such as audience response devices, which gather immediate feedback on presenters’ content. Networking tools available through organizations automatically will gather contact information as fellow participants “meet and sync” during networking events, allowing participants to follow up easily with contacts.

New survey tools are being developed to gather follow-up data to understand the degree to which conference attendees actually are applying what they learned and, more importantly, the impact and economic return the investment is bringing to the organization.

So, what does this have to do with the chief learning officer?

The Role of the CLO in Showing Value for Meetings and Events

The learning conference season is upon us. How do you decide which conferences you want your staff to attend? Is location the biggest driver, or is it the benefits of the sessions and networking events?

Most organizations today are looking for some return for sending employees to major meetings and events, especially the large conferences. If you are one such organization, consider the following.

Prior to a conference or event, work with the employee(s) to:

- 1. Identify the business opportunity of your learning function.** What efficiencies could be gained within your function if job performance changed?
- 2. Identify the job performance need.** How does job performance need to take advantage of the business opportunity?
- 3. Identify the learning need.** What do employees need know to change their job performance? What skills/knowledge will help them?

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4. Identify the preferred sessions/conferences. These sessions should help them gain the knowledge needed to change their performance so they can take advantage of the business opportunity. Consider the sessions offered at the different conferences and select those that will best serve the employee, as well as the organization.

Then, work with your employee to develop a plan, including objectives. The learning function bends over backward to help other functions define needs and develop programs to meet those needs, but what about the needs of your staff?

While your employees are attending conferences, check in — not to give them a job task but to see how the sessions are going — to understand what they are learning and to find out how they can apply it.

When your employees return, spend a few minutes reviewing objectives and get some feedback. Then, support them as they try to apply newly acquired knowledge and skills.

As the participant in my session suggested, conference providers should be interested in showing the ROI for participant investment in their conference. But as CLOs try to convince managers unsupportive of training that success in learning transfer begins with them, doesn't the same hold for you as you send your employees to major meetings and events?

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SIDEBARS

Sites to Technology Support Meetings Measurement

- iDNA (http://www.idnausa.com/capabilities/meetings_and_events.php)
- KnowledgeAdvisors (<http://www.knowledgeadvisors.com>)
- Meetings Professionals International (<http://www.mpiweb.org>)
- nTag Interactive (<http://ntag.com>)

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Should the Meetings and Events Function Report to the CLO?

Most medium to large organizations have a formal events function that plans corporate meetings. Historically, this function has reported to sales and marketing because so many meetings involve sales.

According to meetings and events research, however, there is a trend to have the meetings and events function report to procurement. Procurement is concerned with vendors and suppliers.

Sometimes, the function is moved to that location because executives cannot clearly see the value. When value is unclear, there is a temptation to place it in an area that will control the costs.

Meeting planners suggest meetings and events represent learning opportunities. Given this, a more logical place for the function might be under the guise of the chief learning officer. Some organizations are moving in this direction. Is yours?

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