Meeting Planner ROI: Determining Non-Financial Metrics of Success of Planners

Lesley Gail Scamacca, PhD, CMP
The Pennsylvania State University
The Graduate School
College of Education
Department of Learning and Performance Systems
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INTRODUCTION
This study comes at a critical time. As the industry continues to grow and mature, and
meetings and events become strategic solutions for clients, meeting professionals are required to
show business value in the meetings and events that they plan. Clients need constant reassurance
that their event will have a positive or a successful outcome. In some cases, this measure of
success can be a financial one: where the meeting or event benefits outweigh the costs.
However, with a wide variety of meeting and event types, it is not always possible to quantify
benefits with a dollar value. Meetings and events can have intangible benefits, but with current
evaluation models, these intangible benefits are not measured well and are somewhat ignored.
Another gap in current meeting and event evaluation models is the focus. Models such as the
Phillips’ Return on Investment (ROI) Methodology measure return on investment for the client,
but much of the data is not relevant or collectible for the meeting professional.
The need to demonstrate business value and limited success metrics are the basis for this
study. The primary study purpose was to determine if experiences offered by the meetings and
events industry are, as alleged by Pine and Gilmore (1998, 1999, 2001, 2011), multidimensional
and focused on entertainment, education, escape, and esthetics, with a secondary purpose of
defining meeting professional success based on documented experiences.

Statement of the Problem
From an evaluation standpoint, industry professionals are faced with two primary issues.
First, is the definition of a successful meeting or event, followed by how to appropriately
measure intangible, non-financial success. What constitutes success may vary by industry
segments or meeting type, but these nuances aren’t addressed in current evaluation models, such
as ROI. According to its creators, ROI is only an appropriate measure in five percent of
meetings and events (Myhill & Phillips, 2006), which suggests that additional success metrics
can be developed and tested.

Research Questions
This study answered three research questions:
R1. How do meeting and event professionals define success of the meetings and
events they plan?
R2. Do the key traits in the planning process that contribute to success vary per event
type, as defined by Pine and Gilmore’s Experience Economy?
R2a. What are the key tangible, intangible, and/or non-financial traits in the
planning process that contribute to success for educational events?
R2b. What are the key tangible, intangible, and/or non-financial traits in the
planning process that contribute to success for entertainment events?
R2c. What are the key tangible, intangible, and/or non-financial traits in the
planning process that contribute to success for escapist events?
R2d. What are the key tangible, intangible, and/or non-financial traits in the planning process that contribute to success for esthetic events?

R3. How are these key traits tracked and measured?

**Conceptual Framework**

This research study is informed by extant theory. The current evaluation model used to measure meeting and event success is the Phillips’ ROI Methodology. Developed by Jack Phillips, this methodology is based on five levels of evaluation data, to ultimately determine the return on investment. These five levels of data necessary to calculate ROI are (1) statistics, scope, and volume, (2) reaction and satisfaction, (3) learning, (4) application, and (5) impact.

This model does not exactly match the needs and objectives of meeting professionals for a number of reasons. First, it is more appropriate for the clients of the planned meeting and events, rather than the planners. Second, this methodology does not account for intangible and non-financial metrics.

Pine and Gilmore (1998, 2011) suggest that products mean more to clients than just the tangible goods, and that enjoyment comes from the “experience” that coincides with the consumption of a tangible good or intangible service. Pine and Gilmore (1998, 2011) further suggest that experiences can be sorted into four categories or “realms” of entertainment, education, escapist, and esthetic. Rather than using the current classifications of the meetings and events industry such as Corporations, Associations, and Government, or by the acronym MICE, defined as Meetings, Incentives, Conferences, and Exhibition (The Free Dictionary, 2011), this study used Pine and Gilmore’s (1998, 2011) four categories or “realms” of entertainment, education, escapist, and esthetic. Pine and Gilmore (1998) state, “an experience occurs when a company intentionally uses services as the stage, and goods as props, to engage individual customers in a way that creates a memorable event,” which can be applied to the meetings and events industry. See Figure 1.
Review of Related Literature

While the Phillips’ Return on Investment (ROI) model is currently used to measure meeting and event success, Jack Phillips, creator of the methodology, has stated that, “not all meetings are candidates for ROI measurement” (Myhill & Phillips, 2006). ROI may only apply in five percent of meetings and events (Myhill & Phillips, 2006), which leaves some room open to determine other possible success metrics, specifically non-financial ones.

Drawing on the literature in the human resources/ training and organization development fields, it may be possible to find ways to calculate success based on intangible experiences. Pine and Gilmore (1998, 1999, 2001, 2011) suggest that the economy has progressed from an agrarian, or commodities based one, to an industrial (goods) economy, to a service economy, and finally to an experience economy. Pine and Gilmore (1998, 2011) further suggest that experiences can be sorted into four categories or “realms” of entertainment, education, escapist, and esthetic. Pine and Gilmore (1998, p 98) state, “an experience occurs when a company intentionally uses services as the stage, and goods as props, to engage individual customers in a way that creates a memorable event.” This definition can be applied to the meetings and events industry.

One way to think about experiences, Pine and Gilmore comment, is to consider two dimensions. The first continuum is customer participation, which ranges from passive to active. The other dimension of experience describes the connection, or “environmental relationship that unites the customers with the event or performance” (Pine & Gilmore, 1998, 2011). The connection spectrum runs from absorption to immersion as in Figure 1.
METHODOLOGY
Research Design

Based on my research questions, a qualitative methodology was most appropriate to answer them. According to Edmondson & McManus (2007), “qualitative data are appropriate for studying phenomena that are not well understood.” In this two-tiered study, I began with telephone interviews to address both the primary and secondary study purposes. Using the data from the interviews, I created a Likert-scale survey to aid with data triangulation.

Recruitment

The interview respondents were drawn from the population of executive leadership from 25 out of the 31 member organizations of the Convention Industry Council (CIC). Executive leadership was for their breath of experience in planning a variety of events. I recruited six subject matter experts to discuss the definition of success in the meetings and events that they plan (research question #1), elements that contribute to the success of those meetings and events (research question #2), and metrics for the measurement of the elements identified in research question #2 (research question #3).

For the second tier of this study, I randomly sampled the membership of the Middle Pennsylvania Chapter of Meeting Professionals International (MPMPI). MPMPI has 108 members, so 80 study participants were drawn from the chapter membership, as suggested by Paul E. Krueger (Farmer & Rojewski (Eds), 2001, p. 250).

Data Collection

The interview respondents were asked to answer my questions in as much detail as they could. After taking notes on the answers of questions one and two, I summarized the responses to the respondent, to ensure that I had accurately captured the content of the answer.

As suggested by McGrath (1982), “Multiple approaches are required. Multiple methods not only serve the purposes of replication and convergence; they serve the further, crucial purpose of compensating for inherent limitations that any one method, strategy, or design would have if used alone.” To address the issues of reliability, validity, and triangulation I used the interview data to inform the survey questions. The meeting professional respondents were asked to read each statement, and circle their level of agreement.

Ethics in Data Collection.

I promised confidentiality and anonymity for the respondents of both the interviews and the survey. I also remained unbiased in my collection of information.

Data Analysis

- Phase 1: Open coding. After conducting the interviews, I began to analyze the data with transcription, and as suggested by Lincoln and Guba (1985), followed with member checking to validate my interpretations of the interviews. After member checking was
complete, I began analyzing the data by using the open-coding approach. Strauss and Corbin (1990) advise asking questions “in which one asks who, when, where, what, how, and why questions of the data and begin to identify constructs that arise from the data, documents their properties, and notes recurrent themes” (cited in Purdy & Gray, 2009, p. 359). To conduct this first-order analysis, I did not use a priori codes, but rather let the data determine common codes.

- **Phase 2: Axial coding.** After open coding, I completed axial coding. As recommended by Strauss and Corbin (1990), the axial coding involves documenting patterns and themes in the data. I grouped codes together into common themes and looked for relationships within the data.

- **Phase 3: Triangulation.** Jick (1979) discusses the importance of triangulation, as it helps counter-balance weaknesses in a single method with strengths of another. The survey showed support for the success themes that emerged during the interview rounds.

**STUDY RESULTS**

**Summary of Findings**

My findings suggest that the main definition of success includes the satisfaction of predetermined stakeholder objections (research question #1). The stakeholders are planners, suppliers, attendees, and the meeting/event host. The stakeholder objectives do vary based on event type (research question #2). Interestingly, no one could address the “esthetic” experience quadrant as a stand-alone event type. The consensus among the respondents was that each event type contains esthetically pleasing elements. For research question #3, each experience event type shared similar measures of pre/post meeting assessment, feedback, surveys, and attendee reaction. Figure 2 shows a visual of the themes that emerged during data analysis, and that were corroborated during triangulation.
CONCLUSIONS AND RECOMMENDATIONS

This study has just begun to explore the connection between the experience economy and the meetings and events industry. This study, too, has just begun to explore alternate evaluation techniques for meeting professionals. For future research, it is necessary to continue to define the experience realms, particularly the “escapist” and the “esthetick” realms. Additional exploration in the measurement of the success metrics is also a viable future research path.

Figure 2: Emergent Themes for Success Definition and Measurement.
This study investigated success from the views of a meeting professional. Interviewing industry experts opened the conversation about alternative approaches to meeting professional success and evaluation. I hope to continue this conversation to help professionals define their worth in all event types and all economies - not just when desperate financial times call for proof of success.

REFERENCES


