ELEVATE YOUR *Analytics*

SUCCESS BY THE BOOK:

How to Develop KPIs with Metrics that Matter

Jonathan Wolff, Global Events Manager, Lenovo Solutions and Services Group (SSG)
Joe Federbush, President, EVOLIO Marketing

PRESENTED BY

Jonathan Wolff, Global Events Manager
Lenovo Solutions and Services Group (SSG)
Jwolff1@lenovo.com

Joe Federbush, President & Chief Strategist
EVOLIO Marketing
joe.federbush@evoliomarketing.com

AGENDA

- Why KPI Playbooks are So Important
- KPI Playbook Development Process
- Case Study: Lenovo SSG's KPI Playbook
- Q&A

CEMA
SUMMIT 2023

METRICS VS KPIS VS OKRS

Metrics

- Not every metric is a KPI
- Metrics are based on specific, individual activities
- Metrics do not provide a lot of insight on their own
- Examples: # Visitors, # Leads, Cost per Lead, Buying Role, Interest

KPIs

Key Performance Indicators

- All KPIs are metrics
- holistic view of performance
- KPIs inform where exactly your program and teams stand with respect to overall business goals
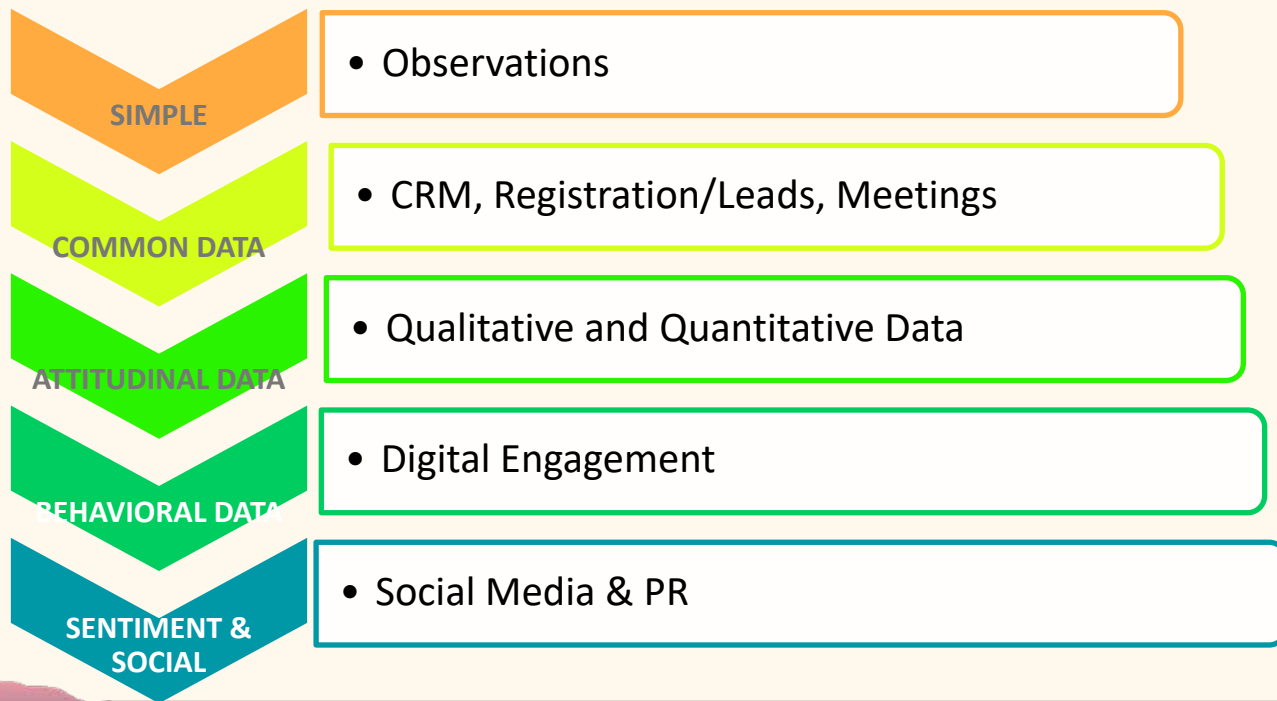- Examples: Brand Impact; Demand Gen; Sentiment; Experiential Success

OKRs

Objectives & Key Results

- Goal-setting framework to set & achieve ambitious goals
- Objectives are specific, measurable, and for a defined period
- Are based on metrics and KPIs to measure progress towards objectives

SO MANY WAYS TO CAPTURE KPIS

SIMPLE
- Observations

COMMON DATA
- CRM, Registration/Leads, Meetings

ATTITUDINAL DATA
- Qualitative and Quantitative Data

BEHAVIORAL DATA
- Digital Engagement

SENTIMENT & SOCIAL
- Social Media & PR

WHY A KPI PLAYBOOK IS SO IMPORTANT

01
Consistency

- Develop BKMs & standardization
- Identify the *right* KPIs to be tracked and reported
- Helps with budgeting and cost savings, portfolio optimization & and identifying trends

02
Focus

- Relevant metrics that matter and are actionable
- Better, informed decisions
- Setting targets; Meeting or exceeding them
- Have data-backed decisions to make changes necessary to improve success

03
Alignment

- Scale KPIs across levels
- Align with corporate objectives
- Ensure that everyone involved is working towards the same goals & outcomes
- Connect business to outcomes

04
Continuous Improvement

- Identify areas to improve based on data (not feelings)
- Remain relevant and valuable
- Make changes to increase success & establish & maintain benchmarks

CREATING YOUR KPI PLAYBOOK

01
Define objectives to guide KPI selection

- Stakeholder insights: What matters most to whom?

- Align with event objectives, tier-levels, regions/geos, and budget

- Actions taken with each KPI

02
Data Collection

- Who will be responsible for capturing data?

- Feasibility based on sources, resources, and budget

03
Analysis & Reporting

- Who will be responsible for analyzing, reporting, and reviewing KPIs?

- Use templates and publish KPI results

EVENT KPI FRAMEWORK

KEY OBJECTIVES AND DATAPOINTS (EXAMPLE)

Demand Gen	Brand Impact	Engagement	Thought Leadership
• Attributable revenue • Meetings impact • Advancing sales stages • MQLs/SQLs/CRM • Nurturing campaigns • Key Account connections	• Agreement with messages about brand & competitors • Net Promoter Score® • Product/Brand - perception/affinity - preference - awareness - association	• Quality of visitors and experience (exhibit, demos, sessions/ keynotes, etc.) • Behavioral Analysis • Social media engagement	• Reach • Sentiment • Key Message & Story Delivery • Relevancy & Believability

EVENT KPI FRAMEWORK

KPIS BY OBJECTIVES AND EVENT TIERS (EXAMPLE)

	Tier 1	Tier 2	Tier 3
OBJECTIVE - DEMAND CREATION			
Potential revenue opportunity amount	Required	Recommended	Recommended
CRM: Revenue/closed deals tracking	Required	Recommended	Recommended
Pipeline advancement	Required	Recommended	Recommended
Number registrants/check-in/visitors	Required	Recommended	Recommended
Number meetings during event	Required	Recommended	Recommended
MQLs/SQLs	Required	Optional	Optional

	Tier 1	Tier 2	Tier 3
OBJECTIVE - ENGAGEMENT (IN-PERSON/ONLINE)			
Attendance, Visitors, Visits Check-ins, inclusion of partners	Required	Required	Required
Satisfaction with Brand	Required	Recommended	Optional
Intel Exhibit/Event NPS (*not* Intel *brand* NPS)	Required	Recommended	Optional
Content Rating(s)	Required	Recommended	Optional
Internal Stakeholder/Staff Survey	Recommended	Recommended	Recommended

EVOLIO
marketing

Case Study

Lenovo

KPI Playbook
Development
Work in Progress

CASE STUDY: LENOVO SSG

SITUATION	SOLUTION
Lack of consistent metrics and tracking outcomes	Standardized and weighted objectives; Centralized event selection process
Disconnect between how geos execute events	Standardized dashboards to present results
Selecting the right events and the right investment-levels	KPIs tracked and reported consistently
Lack of accountability (meetings, MQLs & SQLs)	Sales and Executive buy-in
How competitors are showcasing services and solutions	What works best; Ways to improve

CEMA
SUMMIT 2023

CASE STUDY: LENOVO SSG

CASE STUDY: LENOVO SSG

DATA MODIFIED FOR ILLUSTRATIVE PURPOSES

CASE STUDY: LENOVO SSG

Always on Demand Gen (Lead Prospecting & Nurture)

SSG Activity Summary (1Q to 7/11)

Leads in Progress w/LDT	MQLs	SQOs	MQL to SQO Conversion Rate	Oppy Revenue
75	88	12	12%	$523K

Please note: *Leads in Progress with LDT Team* = leads being reviewed and prequalified.

Active Demand Generation Plays (LDT & Vendor-led)	Contacts Targeted (Cold/Warm Leads)
TSIA & the Lenovo Lounge, May 8-10th	231
DWS Webinar, May 18	371
Nutanix .NEXT, May 9-10	17
RedHat Summit, May 21-23	30
Gartner Digital Workplace Summit, June 12 - 13	293
InfoComm, June 10 - 16	24
APOS Warranty (May – August expirations)	1270

Demand Plays Program Activity Summary

- 2.2K Contacts Engaged
- 7.7K Outbound Activities
- 26 Nurture Accounts

Nurture accounts = Customer requested additional information or requested a callback greater than 3 mos

**DATA MODIFIED FOR ILLUSTRATIVE PURPOSES**

Pulling it all together

START YOUR KPI PLAYBOOK CONVERSATION

1. Who and what are these KPIs for?
2. What are the highest priority objectives?
3. How do the KPIs align with your company's mission?
4. How are the KPIs going to be actionable?
5. How are the KPIs going to be tracked?
6. Who will determine the data source(s) required to capture data and track each KPI
7. Who will be responsible and accountable for tracking and reporting KPIs?
8. Will there be "responsibility with authority"?
9. How frequently will KPI data be reported and shared?
10. How will KPIs be presented and by whom?
11. How will be results be iterated and evaluated to remain relevant?
12. What budget and resources are necessary?

Event KPI Playbook Template
to help you get started
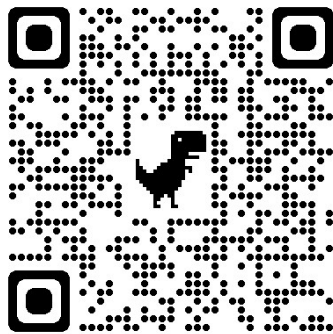
CEMA SUMMIT 2023

Q&A

Thank you!

CEMA SUMMIT 2023

ELEVATE YOUR *Analytics*