

SUCCESS BY THE BOOK:

How to Develop KPIs with Metrics that Matter

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AGENDA

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

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

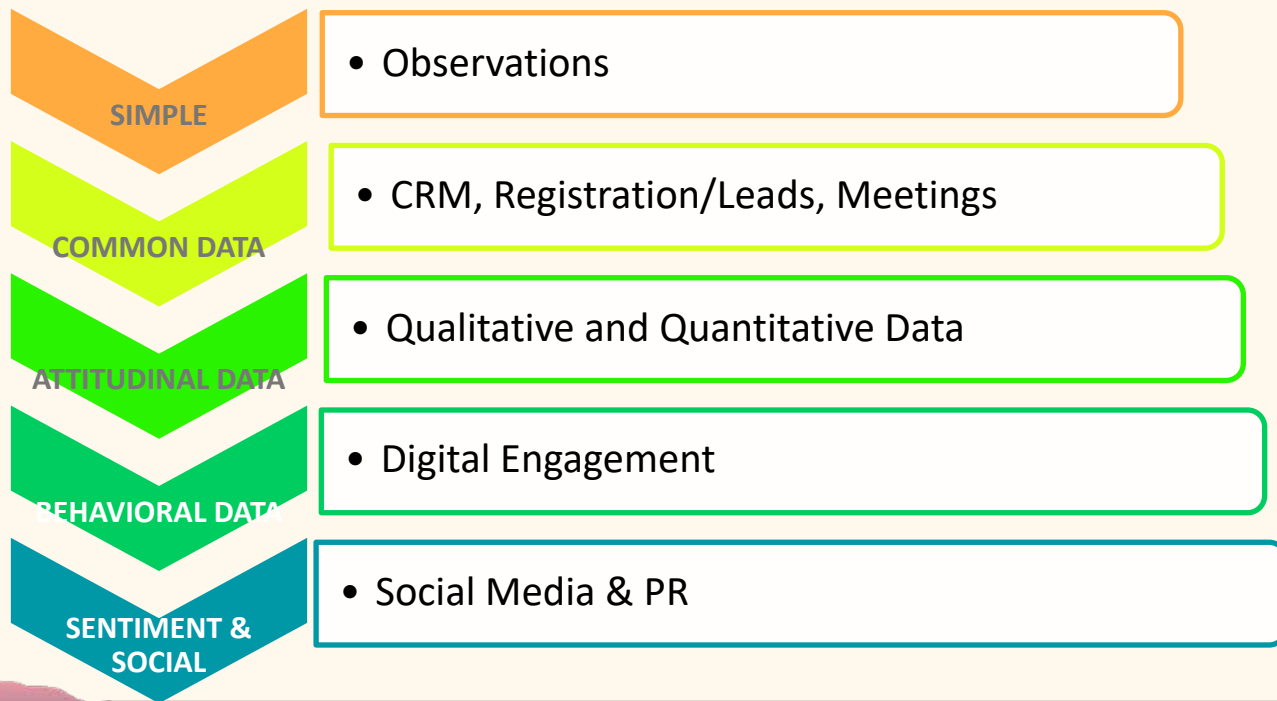


OKRs

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



WHY A KPI PLAYBOOK IS SO IMPORTANT

01

Consistency

- Develop BKM's & 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
<ul style="list-style-type: none">• Attributable revenue• Meetings impact• Advancing sales stages• MQLs/SQLs/CRM• Nurturing campaigns• Key Account connections	<ul style="list-style-type: none">• Agreement with messages about brand & competitors• Net Promoter Score®• Product/Brand<ul style="list-style-type: none">- perception/affinity- preference- awareness- association	<ul style="list-style-type: none">• Quality of visitors and experience (exhibit, demos, sessions/ keynotes, etc.)• Behavioral Analysis• Social media engagement	<ul style="list-style-type: none">• 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
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 (<i>not Intel brand NPS</i>)	Required	Recommended	Optional
Content Rating(s)	Required	Recommended	Optional
Internal Stakeholder/Staff Survey	Recommended	Recommended	Recommended

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

CASE STUDY: LENOVO SSG

Methodology, Objectives & Summary

The objectives of this research are to:

- Understand the profile of booth visitors to determine if target audiences are attracted.
- Recognize visitor experience including value received and staff performance.
- Measure brand perception and actions visitors plan to take as a result of their visit.
- Determine if new revenue opportunities have been established in addition to success of meeting with existing customers.
- Help future event planning.

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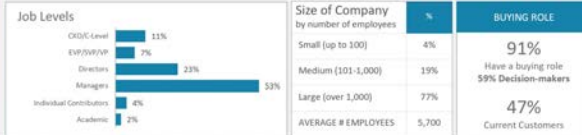
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METHODOLOGIES

SOME DATA HAS BEEN MODIFIED FOR ILLUSTRATIVE PURPOSES

ON-SITE	1 Interviewer	158 Responses	2 # of Interviewing days	±7 Margin of error	\$10 Incentive: Starbucks gift card
POST-EVENT	584 # Emailed	131 # Responses	22% Response Rate	±8 Margin of error	None Incentive

VISITOR PROFILE AND QUALITY (ONSITE SURVEY)



RETURN ON EXPERIENCE (ROX)



RETURN ON EXPERIENCE (ROX)

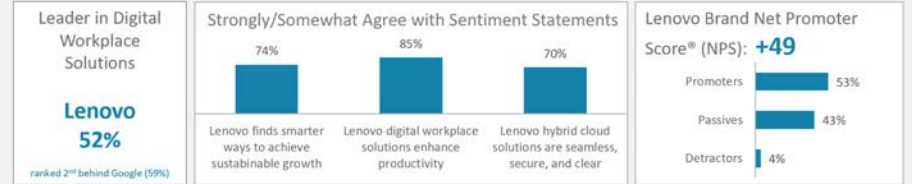


SOME DATA HAS BEEN MODIFIED FOR ILLUSTRATIVE PURPOSES

Booth Areas Visited

	Discussed	Value of info (excellent/good)
Digital Workplace Solutions	66%	91%
Support Services	19%	90%
Sustainability Solutions	9%	100%
Hybrid Cloud Solutions	9%	100%

BRAND PERCEPTION



CASE STUDY: LENOVO SSG

MYSTERY SHOPPING

Gartner Digital Workplace Summit 2023 Lenovo and Competitor Observations Summary

	aws	kyndryl	Infosys [®] Navigate your next	riverbed EMPOWER THE EXPERIENCE	Lenovo	Lakeside [®]
Overall Score	4.0	4.0	3.6	3.5	3.2	3.2
Booth Activity Score	3.3	3.3	2.7	4.0	3.3	3.7
Staff Score	5.0	5.0	5.0	3.0	3.0	2.5
What worked well	<ul style="list-style-type: none"> Excellent staff qualifying Staff engagement and knowledge 	<ul style="list-style-type: none"> Staff engagement and knowledge 	<ul style="list-style-type: none"> Excellent staff qualifying 	<ul style="list-style-type: none"> Personalized demo Staff engagement 	<ul style="list-style-type: none"> Technical level of information Friendly and engaging staff 	<ul style="list-style-type: none"> Personal demo
What could be improved	<ul style="list-style-type: none"> More imagery in larger booth Personalized or interactive demo 	<ul style="list-style-type: none"> Qualify visitors More personalized demo 	<ul style="list-style-type: none"> More personalized demo 	<ul style="list-style-type: none"> Better qualify visitors 	<ul style="list-style-type: none"> Better qualify visitors Personalized demo Shorten message 	<ul style="list-style-type: none"> Better qualify visitors Personalized demo

Rating scale: 5=Excellent ... 1=Poor

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DATA MODIFIED FOR ILLUSTRATIVE PURPOSES

CEMA
SUMMIT 2023

MYSTERY SHOPPING

kyndryl

Observations

Lakeside Software | Silver Sponsor | <https://www.lakesidesoftware.com>

Lakeside Software is a leader in cloud-based digital experience management. Lakeside's Digital Experience Cloud, powered by TevTrack, gathers and analyzes data on everything that may impact end-user experience and business performance and provides the operational visibility it takes to design and support rapidly changing digital workplaces. Customers use Lakeside's technology to perform end-user experience management, digital workplace planning, IT asset optimization, remote work management, and proactive service desk operations.

BOOTH DESIGN AND ACTIVITIES

3	Key message or theme	"Elevate your employee and customers experiences."
3	Interactive demo and activity	Conversation only, no personalized demo
4	Giveaway	Phone charger

Booth Design & Activity Rating

BOOTH STAFF

5	Asked qualification questions	Asked company, industry, job role and challenges
5	Product knowledge	Friendly staff making learning about their solution more interesting. Good balance of technical and strategic

Booth Staff Rating

4.0 OVERALL RATING

Rating scale: 5=Excellent ... 1=Poor

Key takeaways:

- Spinoff from IBM, now an independent company focused on large infrastructure services.
- Six practices, including digital workplace services and mainframes.
- End-to-end management of the end-user experience, including devices, ecosystems (Microsoft), applications, and analytics.
- Agent-based monitoring on endpoints to collect data for analysis, including using AI.
- Focus on improving the end-user experience, solving issues, creating automations, and enhancing processes resulting in cost savings.
- Customers include larger companies, especially those open to outsourcing IT management, project-based services, and consulting.



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MYSTERY SHOPPING

Lenovo

Observations

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BOOTH DESIGN AND ACTIVITIES

2	Key message or theme	Long message: "Experience the ultimate work habitat with any device any place any time, with robust security and personalized support"
4	Interactive demo and activity	Limited time: Gamification tied in with messaging was a great attractor
4	Giveaway	Logos and stickers

Booth Design & Activity Rating

BOOTH STAFF

2	Asked qualification questions	Qualification questions could be asked more by some staff
4	Product knowledge	Conversation was very technical and heavily focused on features/solutions

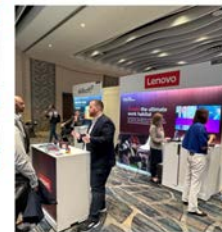
Booth Staff Rating

3.2 OVERALL RATING

Rating scale: 5=Excellent ... 1=Poor

Key takeaways:

- API integration for predicting failures and providing support to end users before system downtime affects efficiency.
- Emphasis on service desk advantage, compliance, and security in bridging the gap between tools and partnering for monitoring and response.
- Highlight hardware-agnostic platform with predictive analytics as a critical component, scaling to support a minimum of five users and considering utilization.
- Consistent infrastructure monitoring for application utilization, failure detection, and bandwidth constraints to anticipate and address issues.
- Position Lakeside or LDI as a valuable standalone offering, providing insights and leveraging data for customers who may not know how to utilize it effectively.



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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 8-10 th	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

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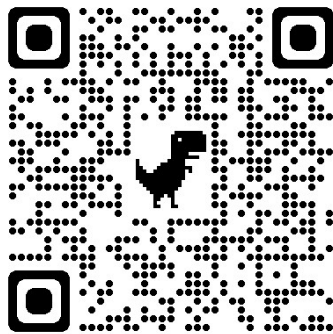
Pulling
it all
together



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



Q&A

Thank you!

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ELEVATE YOUR

Analytics