How Analysis Informs Planning: Collecting Data to Improve Programs

By:

Lynn A. Adams
Georgetown Law Center CLE
Washington, D.C.

Presented at:
ACLEA 49th Annual Meeting
August 3-6, 2013
Baltimore, Maryland
Lynn A. Adams  
Georgetown Law Center CLE  
Washington, DC

Lynn Adams is a Program Manager for the Department of Academic Conferences and Continuing Legal Education at Georgetown Law. In this role, she manages the Advisory Boards, planning processes, and on-site logistics for several annual CLE conferences. Lynn is the chair of the Online Communities strategic planning committee, former chair of ACLEA's Exhibitors and Sponsors committee, and a past contributor to ACLEA's *In The Loop*.

Lynn is currently a student in Georgetown University's Leadership Coaching certification program. She's also a graduate of Georgetown University with a Masters in Professional Studies in Public Relations and Corporate Communications and of the University of Pittsburgh with a Bachelor of Arts in Communications.
How Analysis Informs Planning: Collecting Data to Improve Programs

We all collect immense amounts of information about programs we have conducted. Collecting data, however, is only part of our jobs. We must also analyze our data to evaluate what we’ve done and guide us in our planning for the next year’s program. What can we learn from evaluations? What financial data is important to analyze? What marketing efforts should we continue? In this interactive session, we’ll find out what information is regularly collected during and after a program, and then ask the important question: what do we do with this data?

“Because we’ve always done it that way!”

Although it’s very likely that you’ve heard this saying many times before, it is certainly not a reason for making decisions regarding your annual programs. Making data-driven decisions is crucial because it allows your organization to take information that it has proactively collected about a past conference and turn it into a well-informed decision to implement or change something about your next conference.

But what information should an organization collect for a program analysis? There are many areas of data, each having specific topics within. Some of the main areas are: history, financials, marketing, registration and customer information, and evaluation data.

History.
Why is history important in terms of analyzing a program? History provides the context for a program analysis document. Especially in organizations of high turnover, a historical overview of a particular program can be invaluable for informing new team members. It is also helpful for annual programs that have been in existence for a long time – a decade, or two, or even more – as it tells the story of how the program has evolved.

Some historical information to document: how long has this program been in existence? What’s the typical size and scope of the event? What political issues have arisen in the past? What relationships are most important to this program? What competition does this program have? Were there ever any remarkable iterations of the program, and why?

How do we use this data?
History is the only area that you might not “compare,” so to speak. Rather, it will become documentation that your organization can build on after each new iteration. The following areas, however, should be compared year-over-year to track a program and predict its success.

Financials.
Perhaps the most important area for some organizations is the bottom line. Methods of analyzing financial data vary greatly, depending on the type of program, size of the organization, or even just the level of detail that is preferred. But even the smallest of CLE organizations must balance the books in some way! What’s important about the financial piece is the analysis of the expenses and revenue.

Some specific pieces of data that are important to collect are:

- Gross revenue
- Expenses
- Operating margin
• Net revenue
• Notable savings as compared to the last event
• Notable unplanned expenses
• Average fee paid per attendee
• Operating cost per attendee

How do we use this data?
Financial analysis informs all forms of budget planning for next year’s conference. Recommendations for the preparation of next year often come directly from the program analysis document. For example, if the average fee paid per attendee was lower one year as compared to the prior year, a recommendation may be to decrease the number of discounted or complimentary guests in an effort to increase the average fee paid per attendee in the future.

Marketing.
There is always extensive research that takes place when an organization is deciding how to market a particular program. That said, the first part of a marketing section in a program analysis document should be an explanation of the various marketing efforts and relationships necessary for each. This section may also include challenges that an organization faces in marketing a program, so that in the future, these challenges can be avoided, or – best yet – overcome.

Of course, most important within the marketing section is the actual return of each marketing effort. A simple chart can be effective provided it includes all relevant information, such as:

• Marketing effort
• Date of effort
• Number of registrations yielded

Some additional data to collect regarding email marketing campaigns would be:

• Number of bouncebacks
• Number of opt-outs
• Number of opens
• Number of click-throughs
• Number of forwards

How do we use this data?
Even for annual programs, new marketing plans are created each year based on changes in the legal industry or practice area. That said, analysis of the prior year’s marketing data is helpful in deciding which efforts to continue – due to high return or low cost, perhaps – and which to discontinue – because of minimal yield or high cost.

Registration and Customer Information.
These two areas truly inform the marketing function of conference operations, but may be used many different ways. Some information that is common to collect (on a registration form, in a post-program evaluation, or within your company’s database) is:

• Company
• Company type or size
• Companies that send multiple guests
• Location
• CLE state
• When a person registered
• How a person registered
• What price a person paid
• How many times a person has attended the conference

How do we use it?
Customer and registration information is invaluable, and possibilities surrounding how to use this data are endless. To name a few:
• If multiple attendees come from the same company, consider offering them a group discount for the next program if they agree to send more people.
• If a majority of your program comes from a specific state, work with that state’s bar association to obtain their marketing lists.
• If a large number of attendees register for the program at the last minute, consider implementing an “early bird” price to encourage registration earlier.
• If many people register online and very few via brochure, consider eliminating or reducing the number of printed brochures to save on production expenses.
• If a particular guest returns every year, consider a small gift or personal touch of some kind to reward their loyalty and create a lifelong customer.

Evaluations.
Everyone likes to be heard, so the principle behind conference evaluation surveys is a simple one: give your attendees a voice with which they can share their thoughts about your event.

While there are many options for executing these surveys – perhaps it’s by show-of-hands while they’re in the seminar, by a written form that they drop off before they leave, or by electronic survey platform once they’ve returned to their office – the important thing to know is that an organization should meet their guests “where they are.” If guests for a particular program tend to take many handwritten notes, be sure to provide paper evaluations. If the conference attendees come with their iPads or laptops, consider using an electronic survey tool. Organizers should make it easy for guests to provide feedback, as this will both engender support from their guests and increase the number of responses that they receive.

One particular question on an evaluation survey that can be very helpful to us as planners is: “What topics would you like to see covered at our next conference?” This type of crowdsourcing gives your guests the opportunity to play a role in next year’s event and can be a great starting place for your planning committee or Advisory Board.

Other survey questions to consider are:
• “How would you rate this program?”
  o Excellent, good, fair, poor
  o Include specific prompts regarding overall quality, materials, facilities, speakers, etc
• “Why did you choose to attend this program?”
  o CLE credit, topics, speakers, networking, location, other
• “How did you hear about this program?”
  o Brochure, email, Board member, website, word of mouth, other
  o Scale of 1-10
  o 1-5 stars
• Questions regarding specific topics and individual speakers
**How do we use this data?**

Evaluations are vital for understanding changing customer needs. Similar to registration and customer data, this information provides a window into a particular customer’s experience and – if used correctly – can be a critical tool for ensuring a positive experience.

- If a guest expresses a concern about a particular issue on the evaluation form, an organization’s leader can reach out to the customer to discuss it.
- Topics that are suggested on the evaluation form can be shared with the planning committee or Advisory Board to inform their planning of the next event.
- Evaluation comments often denote specific comments made by speakers. As program planners aren’t always in the seminar rooms at all times, these comments are helpful to determine how speakers were received by the audience.

**To summarize…**

It’s important that organizations do not fall into the trap of collecting information just for the sake of collecting information. If your organization is going to take the time to gather information and survey customer, it must also analyze this data in a way that serves the organization in the future.

“Insight is the universe’s consolation prize. Make knowledge actionable.”

**Editor’s Note**

About two years ago, a Program Analysis Committee was formed to review our process at Georgetown Law CLE. Many meetings, flowcharts, and revisions later, we have what we believe to be a good process and documentation in place. However, what I know for sure is that both the process for and documentation of our program analyses will always evolve. As the conference industry – as well as any organization’s mission, goals, and teams – changes over time, so must the process it uses for analyzing the success of its conferences.

From my time serving on this committee, I share just a few logistical tips about the program analysis document…

**Creating**

- The program analysis document should be a collaborative effort, assembled by multiple team members who work in each area.
- If your organization is one that values face-to-face meeting time, consider having scheduling a meeting among those who contribute to the program analysis document at which each contributor can explain their piece. The purpose of this meeting would be to put everyone on the same page and to assemble the document.
- If meetings aren’t the preference in your organization, it can be helpful to have one person serve as the overall editor of the program analysis to ensure that the various contributions are combined smoothly and that the data and recommendations found within remain consistent and accurate.
Sharing and Discussing

- Sharing the program analysis with the organization is an important step in a collaborative environment. The document should be given (in hard copy or electronically) to all organization or team members with a reasonable deadline by which each should review it thoroughly.
- After this deadline, set aside time to discuss the analysis as a group. Those who created the document can choose to present their data or just give a brief overview of their findings.
- The team should discuss any overall themes and address any questions or concerns going forward. It is important to designate a note taker during this meeting to document any action items that come out of the discussion.

Archiving

- The program analysis document in its final form can be saved in a common location such that any member of the team can access it for future planning purposes.
- Another suggestion could be that one team member – perhaps the person in the overall editor role – be the sole person in charge of updating the document with any edits or additions. This will ensure that the document remains accurate and consistent.