

# CTSM PORTFOLIO

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Global Events Planner  
Minitab

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# TABLE OF CONTENTS

## VITAL STATISTICS

About Me .....	Page 1
About Minitab .....	Page 3

## OVERVIEW OF SHOW SCHEDULE

Program Introduction .....	Page 9
2024 Minitab Event Schedule .....	Page 11

## INTRODUCTION TO SHOW OF FOCUS & MEASURABLE OBJECTIVES

Event of Focus .....	Page 14
Event Strategies .....	Page 15
2024 Minitab Exchange Overall Strategies & Measurable Goals .....	Page 16

## MANAGEMENT OF EXHIBIT DESIGN & PRODUCTION

Event Management and Planning .....	Page 19
Event Design & Experience .....	Page 21
Budget .....	Page 28

## MANAGEMENT OF INTEGRATED MARKETING COMMUNICATIONS

Planning & Goals .....	Page 31
Pre-Event Tactics .....	Page 32
At-Event Tactics .....	Page 37
Post-Event Tactics .....	Page 40

## MANAGEMENT OF RESULTS REPORTING

Measuring the Results .....	Page 43
Results of 2024 Minitab Exchange Overall Strategies and Measurable Goals .....	Page 44
Post-Show Analysis Report .....	Page 48
Final Budget Results .....	Page 48

## CONCLUSION

Final Assessment .....	Page 51
Recommendations for Improvement .....	Page 51
CTSM Experience .....	Page 52

## REFERENCES

CTSM Sessions .....	Page 54
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APPENDIX .....	Page 55
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# CRITERIA #1

## VITAL STATISTICS



## ABOUT ME

Marketing and Event Planning were never in my original career plans. A love and appreciation for music led to training in classical flute from an early age and so for most of my life, flute and classical music were my focus. I made it my goal to spend more hours than anyone in school practicing so that I would make it to first chair in all my bands and orchestras.

## EDUCATIONAL BACKGROUND

My introduction to higher education began as I pursued a major in music performance at Penn State University. However, after two years and considerable reflection, I realized that a career in music was no longer the direction I wanted to take as I found interest in other areas such as business and marketing.



My interest in business and management was piqued during my college years. As a result, I decided to pivot my education journey by earning a specialized Associate Degree in Business Administration - Management and Marketing from South Hills School of Business and Technology. To meet my graduation requirements, I completed an internship in Marketing at Minitab LLC. I am currently enrolled at Seton Hill University, working towards completing a Bachelor of Arts Degree in Marketing with my graduation date planned for spring of 2025.



## INDUSTRY CAREER BACKGROUND

As an intern at Minitab, I assisted marketing managers with campaign development and communication plans. Through this role, I gained foundational skills in a global context. I later transitioned my internship to focus on event marketing, where I supported various aspects of trade show and event planning, including budget management, trade show coordination, and project management for our regional sales events.

In 2022, I was hired full time in the role of Trade Show and Event Specialist at Minitab. In this role, I oversaw all aspects of American regional meetings and trade shows, our annual Global Sales Conference, and our annual Global Customer Conference, although we did not execute this event in 2024. In June of 2024, I was promoted to Global Events Planner, where I took on additional responsibilities for managing event initiatives in the European (EMEA) region, as well as our annual Consultant Day and Global Partner Conferences.

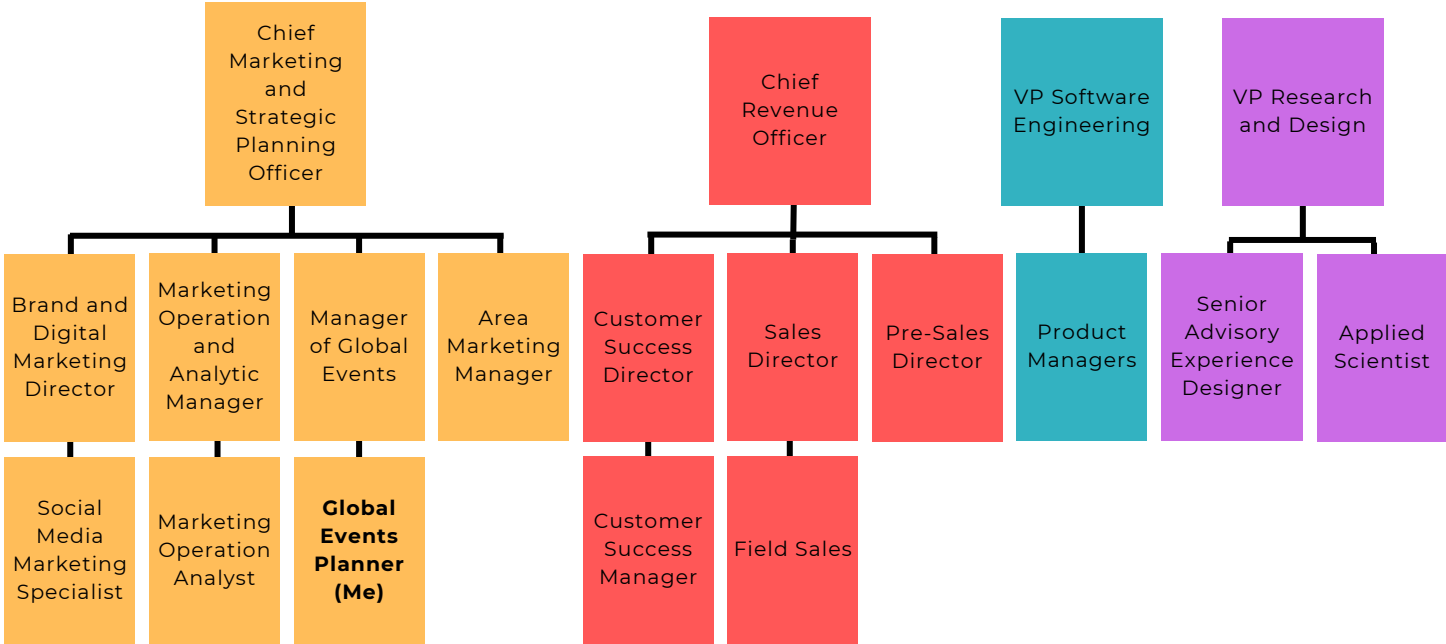


## CURRENT JOB RESPONSIBILITIES

As part of the Marketing Events team at Minitab, my role is to help position Minitab as the leading data analytics software solution provider to help businesses make better data-driven decisions and improve processes. My responsibilities encompass the full event lifecycle, including vendor selection, contracting, booth design, seating arrangements, promotional efforts, marketing, project management, lead collection, budgeting, and reporting. When not engaged in event planning and execution, I work with our team to develop and implement new processes to enhance our event operations.

## KEY STAFF I INTERACT WITH

I work closely with the Global Manager of Events to oversee our entire event and trade show schedule for the Americas and European regions. Within the marketing department, we work closely with our Area Marketing Managers to strategize and execute event promotions to ensure successful event visibility and engagement. We collaborate with the Marketing Operations team to capture and analyze event attendee data and metrics, and track opportunities generated from our events. Within the sales department, we work closely with our Sales Directors who assess and select trade shows to attend. We align with the field sales teams to ensure they are actively promoting our customer events and following up with attendees' post-event. My event of focus for this portfolio had a strong emphasis on customer support. Therefore, we collaborated closely with our Customer Success team within the sales department to shape the program's direction. We also collaborated with individuals from the Research and Design department, Software Engineering department, and Pre-Sales Solution team to develop the agenda. Please refer to the organizational chart below for a view of these relationships.



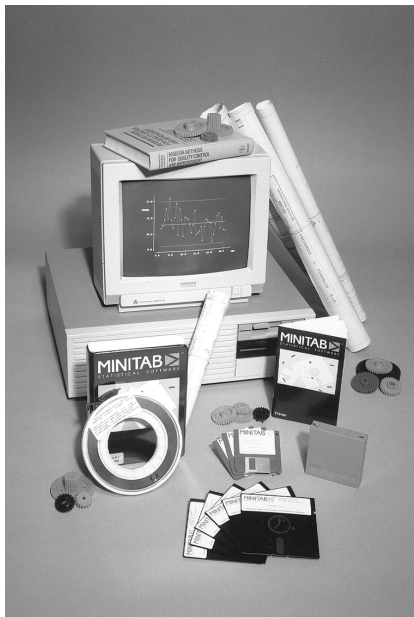
## ABOUT MINITAB

Minitab is a leading data analytics software provider that helps companies by delivering a comprehensive and best-in-class suite of data analysis and process improvement tools.

## SIZE & LOCATION

We are a medium-sized, private, global company headquartered in State College, Pennsylvania. We have regional offices in the United States, United Kingdom, France, Germany, The Netherlands, Hong Kong, Australia, and Japan.

## HISTORY



Minitab software was developed in 1972 at the Pennsylvania State University by Dr. Thomas A. Ryan, Jr., Dr. Barbara F. Ryan, and Dr. Brian L. Joiner to integrate computers into statistics education. Originally a streamlined version of the National Institute of Standards and Technology (NIST) Omnitab, Minitab enabled students to focus on statistical concepts by handling complex calculations previously done by hand.

In 1976, the Minitab Student Handbook was published, guiding professors in using the software for teaching. Minitab's success in academia led to its establishment as a private company, Minitab Inc., in 1983, as demand grew in both academia and industry. During the 1980's, the software gained traction in business due to the rise of quality improvement initiatives, like Motorola's Six Sigma, aimed at reducing defects. Minitab responded by focusing on statistical quality improvement, aligning its capabilities with Six Sigma and other methodologies. Today, Minitab plays a key

role in the Lean Six Sigma and Operational Excellence ecosystems, supporting continuous improvement through participation in industry events, trade shows, and conferences, reinforcing its commitment to advancing these principles globally.

## MARKETS

Today, Minitab supports companies worldwide by providing a software suite of problem-solving solutions dedicated to helping businesses make better, data-driven decisions. Minitab has a very loyal customer base, with our customer list featuring over 90% of the Fortune 100 and most of the Fortune 500. Companies use our products and services across multiple industries, like manufacturing, automotive, pharmaceutical, medical device, oil, gas, and more.

Minitab is the leader in the statistical data analytics space. As Minitab is not a publicly traded company, information about the financials and market share is not shared.



### PRODUCTS

Minitab combines our ecosystem of problem-solving solutions to help businesses make better decisions. Our products include:



This is our flagship product, developed over 50 years ago. Minitab Statistical Software can look at current and past data to discover trends, find and predict patterns, uncover hidden relationships between variables, and create visualizations to tackle challenges and opportunities.



Minitab Connect allows our customers to access their data from a variety of sources, utilize self-service data preparation tools to quickly manipulate their data, and visualize their data using dynamic, real-time visualizations to explore deeper insights from their data.



Minitab Engage allows customers to start, track, manage and share their innovation and improvement initiatives from idea generation through execution. It is a process improvement tool that enables teams to streamline improvement projects.



Minitab Workspace provides our customers with a toolkit to move work forward with powerful visual tools, process maps, brainstorming diagrams, and forms in one interface. These tools help form processes and identify opportunities, making problems easier to solve.



### Minitab Model Ops<sup>®</sup>

Minitab Model Ops allows our customers to deploy and operationalize models, helping business analysts and engineers implement their own Machine Learning and Predictive models. This tool integrates with Minitab Statistical Software, where you can build predictive models and then seamlessly deploy them through Model Ops for on-the-floor use. This empowers our customers to identify key drivers, optimize processes, and make data-driven decisions that improve outcomes.

### Real-Time SPC<sup>™</sup>

Real-Time SPC allows our customers to make easy quality analysis and improvement initiatives as real-time monitoring and alerts allow for immediate action and quality variations. This product centralizes data for easy, at-a-glance monitoring with real-time control charts and dashboards. It can automatically send customized and useful alerts right to individuals and teams via email or text to respond to problems on the manufacturing floor.

### Salford Predictive Modeler<sup>®</sup>

Salford Predictive Modeler is a Machine Learning and Predictive Analytics Software which includes automation and modeling capabilities not found elsewhere in the market. It is a highly accurate and ultra-fast platform for developing predictive, descriptive, and analytical models. This suite of machine learning software includes CART<sup>®</sup>, MARS<sup>®</sup>, TreeNet<sup>®</sup>, and Random Forests<sup>®</sup> engines and features capabilities such as classification, regression, survival analysis, missing value analytics, data binning and clustering/segmentation.

### Education Hub<sup>™</sup>

Minitab Education Hub provides our customers with learning paths, resources, and access to training all in one place.



## COMPETITORS

Minitab's differentiates itself from competitors with our first-class support team and historic expertise in the statistical software field. We support our customers with training, deployment, and consultancy services. Minitab competitors include the following:

### JMP

JMP is a suite of computer programs for statistical analysis and machine learning. They are our biggest competitor in both the commercial and academic industry. They have competitive products such as:



- Interactive, visual data analysis tools. These compete with our flagship product Minitab Statistical Software.
- Predictive modeling and machine learning tools. These compete with Minitab Model Ops and Salford Predictive Modeler.
- Monitoring and data integrity validation tools. These compete with Real-Time SPC.

### R OPEN SOURCE

R is a free software environment for statistical computing and graphics, which compiles and runs on a wide variety of platforms including Windows and MacOS. It supports a range of analytic tasks including:



- Data manipulation and statistical analysis. This competes with Minitab Statistical Software.
- Machine learning and predictive analytics. This competes with Salford Predictive Modeler and our Predictive Analytics Module found in Minitab Statistical Software.

### QI MACROS

QI Macros is a Microsoft Excel add-on that offers competitive features at a low cost. While these features are not as robust as those of our products, they do present competition, particularly with new those who may not have an established or comprehensive quality program within their organization. They have competitive features such as:



- Control charts. These compete with Minitab Connect.
- Fishbone diagrams, value stream maps. These compete with Minitab Engage and Workspace.
- Histograms, box plots, and Pareto charts. These compete with Minitab Statistical Software.



## SAS VIYA

SAS Viya offers AI and analytics solutions to access data, cleanse and transform data, craft data pipelines, and deploy models in one solution. These competitive features include:



- Managing and preparing data: These features compete with Minitab Statistical Software.
- Visualization tools. These features compete with Minitab Workspace.
- Managing and deploying models. These features compete with Minitab Model Ops.

## XLSTAT

XLSTAT is a data analysis and statistical solution add-on for Microsoft Excel. They have competitive features that compete with functionality found in Minitab Statistical Software such as:



- ANOVA
- Regression
- Parametric and Nonparametric tests
- Generalized Linear Models and Nonlinear Models

## SIGMAXL

SigmaXL is a software company that provides graphical and statistical tools and templates. They are a leading provider of Microsoft Excel add-ons for Lean Six Sigma graphical and statistical tools. They have competitive features which include:



- Statistical Process Control capabilities. This competes with Real-Time SPC.
- Monte Carlo, Design of Experiment, Hypothesis Tests. These features compete with features found in Minitab Statistical Software.

## IBM SPSS STATISTICS

IBM SPSS is a statistical software suite developed by IBM for data management and analysis. It competes with Minitab in the academic market, where we have traditionally held a strong market share. Its popularity in educational institutions makes it a significant competitor in this space. They have competitive products such as:



- Data preparation, regression, and advanced statistics. These compete with Minitab Statistical Software.
- Forecasting and Decision Trees. These compete with Salford Predictive Modeler.



# CRITERIA #2

## OVERVIEW OF SHOW SCHEDULE



# OVERVIEW OF SHOW SCHEDULE

## PROGRAM INTRODUCTION

In 2024, Minitab participated in 34 events. Our events program encompasses a wide range of activities, including tabletop participation, sponsorships, industry trade shows, regional customer events called Minitab Exchange, and our annual events such as our Global Sales Conference, annual Consultant Day and Global Partner Conferences, and our annual Global Customer Conference, called Minitab Insights. With a strong global presence, Minitab actively participates in and hosts events around the world. Events and trade shows in the U.S. and European (EMEA) regions are managed by me and our global events team, while those in the Asia Pacific (APAC) region are overseen by the regional marketing team and are not included in this portfolio's reporting.

## MAJOR CHANGES SINCE TAKING OVER

Since I joined the team, a significant shift in the events industry has been the ongoing impact of the COVID-19 pandemic. Our industry has been slow to recover, with lower attendance at trade shows and conferences where we traditionally engage with our target audience. In 2024, we made the decision to pause our Global Customer Conference, Minitab Insights, and reduce our overall trade show schedule to prioritize the expansion of our Minitab Exchange events. This strategy aimed to strengthen our attendee pipeline, ensuring a more successful customer conference in the future. As we plan for 2025 and 2026, we remain focused on growing our regional event program, continuing to adapt our strategy to better connect with customers in the post-pandemic environment.

## INDUSTRY TRADE SHOWS

Trade Shows in the U.S. are thoroughly researched and recommended by the Marketing Events team to our Senior Sales Director who determines our participation. For trade shows in the EMEA region, the regional marketing team gets approval, with the Marketing Events team providing execution and logistic support.

Minitab has been a longstanding exhibitor at industry trade shows. In 2024, Minitab's trade show program included 16 trade shows, four of which were international. Our exhibit sizes vary, ranging from tabletop displays to 10'x10' inline and corner booths. Our largest international presence has been in Germany, where we had a 4m x 8m inline booth, or 32 square meters of exhibit space.

Minitab participates in a variety of industry events, including those focused on Operational Excellence, Lean Six Sigma, Manufacturing, Automotive, and Healthcare. Minitab's strategic trade show initiative is to maintain a strong presence at traditional industry shows while expanding our participation in the Energy, Finance, and Automotive sectors in 2025.



# OVERVIEW OF SHOW SCHEDULE

## CUSTOMER EVENTS

Customer Events refer to Minitab hosted meetings, which offer valuable interactions with our customer base. These events include Minitab Exchange, Partner Conferences, Consultant Days, and our annual Global Customer Conference, Minitab Insights.

Minitab Exchange events are single-day gatherings held across the U.S. and internationally. In 2023, Minitab hosted two Minitab Exchange events in the U.S. and four in the European (EMEA) region. In 2024, that number grew to six in the U.S. and seven in the EMEA region, representing a 217% increase. For 2025, Minitab plans to host at least 18 events throughout the world.

Minitab hosts annual Partner Conferences and Consultant Day events. These events bring together our third-party resellers to discuss business strategies, and provide the support needed to effectively market and sell our solutions in regions where we are trying to build a bigger presence. These events are held regionally, with conferences in EMEA and Asia Pacific (APAC) regions. In 2024, we held the Partner Conference exclusively in the APAC region and the Consultant Day exclusively in the EMEA region.

Minitab organizes the Minitab Insights Conference, a three-day event where we bring our customers together for pre-conference workshops, learning sessions with subject matter experts, networking opportunities, and feedback discussions on new product features and enhancements. In 2024, we paused this conference to focus on expanding our Minitab Exchange events, with the goal of building a stronger pipeline of attendees for a more successful conference in 2026.

## INTERNAL EVENTS

Internal Events include our annual global sales kickoff meeting. This meeting, executed by the Marketing Events team, occurs every January. It unites our field operations team to align goals, objectives, and training for success in the upcoming year. This event has traditionally been conducted regionally, with the event in Europe for our EMEA and APAC teams and in the U.S. for our North American team. In 2025, we will be hosting our first global sales kickoff meeting, bringing together all regions.



# OVERVIEW OF SHOW SCHEDULE

2024 Minitab Event Schedule					
EVENT	DATE	LOCATION	SIZE	INDUSTRY	CATEGORY
European/Asia Pacific Field Operations Conference	1/16 - 1/18	London, UK	Crescent Round Seating for 90	Internal Sales	Internal Event
Americas Field Operations Conference	1/21 - 1/23	Leesburg, VA	Crescent Round Seating for 120	Internal Sales	Internal Event
Operational Excellence Week	1/29 - 1/31	Miami, FL	10' x 10'	Operational Excellence (OPEX)	Trade Show
Design and Manufacturing West	2/6 - 3/8	Anaheim, CA	10' x 10'	Manufacturing	Trade Show
American Society for Quality – Lean Six Sigma Conference	2/18 - 2/20	Phoenix, AZ	Table	Operational Excellence (OPEX)/Lean Six Sigma (LSS)	Trade Show
Gartner Data and Analytics Summit	3/11 - 3/13	Orlando, FL	6.5' X 10'	Operational Excellence (OPEX)	Trade Show
Minitab Exchange	3/12	Coventry, UK	Crescent Round Seating for 80	Various Industries	Customer Event
Collaboration on Quality in the Space and Defense Industries Forum	3/12 - 3/13	Cape Canaveral, FL	Table	Government	Trade Show
Global Industrie	4/3	Paris, France	8m x 4m	Various Industries	Trade Show (EMEA)
Minitab Exchange	4/11	Atlanta, GA	Crescent Round Seating for 50	Various Industries	Customer Event
North American Manufacturing Excellence Summit	4/14 - 4/16	Fort Worth, TX	10' x 10'	Manufacturing	Trade Show
Hannover Messe	4/22 - 4/24	Hannover, Germany	3m x 3m	Various Industries	Trade Show (EMEA)
Control International Trade Fair for Quality Assurance	4/23 - 4/26	Stuttgart, Germany	8m x 4m	Various Industries	Trade Show (EMEA)
Asia Pacific Partner Conference	5/7 - 5/9	Macau, China	Crescent Round Seating for 65	3rd Party Resellers	Customer Event
American Society for Quality - World Conference on Quality Improvement	5/12 - 5/15	San Diego, CA	10' x 10'	Operational Excellence (OPEX)/Lean Six Sigma (LSS)	Trade Show
Minitab Exchange	5/16	Philadelphia, PA	Crescent Round Seating for 50	Various Industries	Customer Event
Minitab Exchange	6/4	Eindhoven, Netherlands	Classroom Seating for 40	Various Industries	Customer Event



# OVERVIEW OF SHOW SCHEDULE

2024 Minitab Event Schedule					
EVENT	DATE	LOCATION	SIZE	INDUSTRY	CATEGORY
Smart Manufacturing Experience	6/4 - 6/5	Pittsburgh, PA	10' x 10'	Manufacturing	Trade Show
Minitab Exchange	6/18	Rosemont, IL	Full Round Seating for 100	Various Industries	Customer Event
Minitab Exchange	7/11	Lyon, France	Classroom Seating for 60	Various Industries	Customer Event
Joint Statistical Meeting	8/3 - 8/8	Portland, OR	10' x 10'	Education	Trade Show
Minitab Exchange	8/15	Columbus, OH	Crescent Round Seating for 50	Various Industries	Customer Event
Minitab Exchange	9/10	Dallas, TX	Crescent Round Seating for 70	Various Industries	Customer Event
Minitab Consultant Day	9/12	Amsterdam, Netherlands	Crescent rounds of 40	3rd Party Resellers	Customer Event
Six Sigma Brazil	9/17 - 9/18	Sao Paulo, Brazil	Table	Lean Six Sigma (LSS)	Trade Show
Minitab Exchange	9/18	Eindhoven, Netherlands	Classroom Seating for 65	Various Industries	Customer Event
Minitab Exchange	9/19	Dusseldorf, Germany	Classroom Round Seating for 50	Various Industries	Customer Event
Minitab Exchange	10/3	Coventry, UK	Crescent Round Seating for 80	Various Industries	Customer Event
Automotive Industry Action Group Quality Summit	10/3 - 10/4	Novi, MI	10' x 10'	Automotive Manufacturing	Trade Show
Americas Partner Conference	10/8 - 10/9	State College, PA	Classroom Seating for 40	3rd Party Resellers	Customer Event
Minitab Exchange	10/10	Anaheim, CA	Crescent Round Seating for 50	Various Industries	Customer Event
Association for Manufacturing Excellence International Conference	10/29 - 10/31	Atlanta, GA	10' x 10'	Manufacturing	Trade Show
Northeast Lean Conference	11/7 - 11/8	Providence, RI	Table	Operational Excellence (OPEX)/Lean Six Sigma (LSS)	Trade Show
Institute for Healthcare Improvement Forum	12/10 - 12/13	Orlando, FL	10' x 10'	Healthcare	Trade Show



# CRITERIA #3

INTRODUCTION TO  
EVENT OF FOCUS  
MEASURABLE OBJECTIVES



# INTRODUCTION TO EVENT OF FOCUS

## EVENT OF FOCUS

Since we had a reduction in our overall trade show schedule and decided to focus more on our internal events this year, my event of focus is the Minitab Exchange program that was hosted in the U.S. in 2024. I was able to incorporate much of the lessons taught through CTSM sessions into this program, as it involved a multitude of planning and execution elements necessary for successful event marketing. This event also encompasses a “mini” exhibit space. Although not a traditional trade show, I was able to incorporate knowledge I gained from the CTSM sessions into this element of the event as well.

## DEMOGRAPHICS & TARGET AUDIENCE

This year these events were targeted at existing customers. Our customer base includes an array of seniority levels and spans across multiple industries. Because of this, we chose not to narrow the target audience to one specific industry as it could hinder our registration and attendance rates.

## SPECIFICS ABOUT MINITAB EXCHANGE

As highlighted in **3011R How to Grow Your Brand ELC#3: Recognize Key Characteristics of Brand**, it is important to understand how your business actions define the key characteristics of your brand. Our Minitab Exchange events are their own brand. The goal is to bring customers together to discuss industry best practices, positioning our company as a thought and industry leader.



The event brand named "Exchange" was deliberately chosen to reflect our goal of bringing customers together to share insights, not only with our subject matter experts but also with fellow attendees, fostering networking and knowledge expansion within the industry, and the “exchange” of ideas.

As our event operates under its own brand, distinct from our corporate branding, it helps it stand out and increase awareness. The graphics for our Minitab Exchange events revolve around the image of an "X," which incorporates the colors of all our product logos, subtly nodding to our entire product lineup. We utilize the event branding from the beginning of the attendee experience, starting with our event website, emails, social media posts, and e-Signatures. The event branding also helps provide a visual so when our attendees arrive at the event they already recognize our signage. We have a branded PowerPoint template for all speakers to use during their presentations, ensuring a consistent visual identity. Additionally, we have developed signage for venues to guide attendees to meeting spaces and roll-up banners that enhance the visual appeal and branding of the event.



# INTRODUCTION TO EVENT OF FOCUS

## EVENT STRATEGIES

**3022R No Exhibit Is An Island ELC#1: Improve Process, Quality and Timeliness of our Internal Communications** underscores that the first step in planning a successful event is collaboration. **3048R Sales and Marketing Alignment ELC#4: Practical Techniques to Get Aligned**, describes the need to align with sales and marketing on common definitions and language. Therefore, we began by meeting with key stakeholders from sales and marketing who have a stake in the success of these shows:

- Chief Revenue Officer (Head of Sales)
- Chief Marketing and Strategic Planning Officer
- Senior Director of Global Customer Success
- Manager of Global Events
- Global Events Planner

Through our collaboration, we determined that the main strategies for the 2024 Minitab Exchange event program were to:

**Increase Event Attendance** - In 2023, we held two events in the USA, with an average attendance rate of 21.6 across both. We recognized the need to increase attendance for our 2024 events.

**Increase Customer Engagement** - The 2023 events were primarily focused on promoting our solutions to customers with the goal of upselling and cross-selling products. However, in 2024, our customer success department took on a more prominent role in shaping the event program, aiming to shift the focus from driving sales to supporting customers. Instead of emphasizing sales, we prioritized offering customers tools, support, and opportunities to exchange insights with our experts, making customer engagement a core strategy.

**Increase Sales Pipeline** - Despite this shift in focus, generating ROI remained crucial. We still needed to expand our sales pipeline to gain buy-in from sales managers and their teams.

**Increase Event Brand Awareness** - To build on our 2023 efforts, we implemented a strategy to strengthen our event brand awareness, ensuring the brand would become better known, ultimately leading to greater success for future events.

Following the guidance from **3029 Build a Successful Event Marketing Plan ELC#1: Define Successful Marketing Plan**, we transformed these goals into specific, measurable, realistic, time-sensitive, and challenging objectives.



# INTRODUCTION TO EVENT OF FOCUS

## 2024 Minitab Exchange Overall Strategies and Measurable Goals

STRATEGY	TACTIC	ASSESSMENT METHOD	MEASURABLE GOAL
Increase Event Attendance	Select 6 locations with strongest customer populations	Compare attendance from 2023 to 2024	Goal is to increase average attendance 150%
	Increase Sales Outreach	Post Event Survey	Goal is to have average of 75% of attendees hear about event from their account manager
	Develop and Promote Compelling Agenda	Post Event Survey	Goal is to have average of 90% say they would attend again
Increase Customer Engagement	Incorporate SLIDO Polling Software	SLIDO Utilization Rate	Goal is to have an average 85% audience utilization rate
	Incorporate Interactive Workshop in Agenda	Collect Attendee Data	Goal is to have average of 90% audience interaction in session
	Collect Feedback from Post Event Survey	Post Event Survey	Goal is to get a 75% survey response rate
	Collect Onsite Customer Testimonials	Report on How Many	Goal is to get 10 onsite testimonials
	Invite a Customer Speaker for All 6 Events	Report on How Many	Goal is to have 6 customer speakers
	Provide Free Training to Event Attendees at Each Event	Report on How Many	Goal is to give out 5 free training courses per event, 30 total
Increase Sales Pipeline	Add Solution Center	Report on How Many	Goal is to have 15 conversations at Solution Center at each event
	Incorporate Session in Agenda on New Product Highlights	Post Event Survey	Goal is to have average of 20% of attendees indicate new product interest
	Capture Customer Follow Up Inquiries	Post Event Survey	Goal is to have average of 20% of attendees to ask to follow up with rep
	Upsell and Cross Sell Products	Sales Opportunities Dashboard	Goal is to earn \$500K in Sales Opportunities
Increase Exchange Event Brand Awareness	Garner a good impression of event on attendees	Post Event Survey	Goal is to have average of 90% of attendees say that they would recommend event to a friend
	Improve Targeted LinkedIn Promotions	Engagement Rate	Goal is to have an average 3.5% engagement rate on LinkedIn or higher
	Develop and Promote Event Website	Landing Page Metrics	Goal is to have over 5,000 website views



# INTRODUCTION TO EVENT OF FOCUS

## PROCESS FOR PREPARING FOR EVENT

After we established the overall event strategy and objectives, we formed an Event Planning Committee. This committee includes representatives from key departments, Product Management, Research & Design, Software Engineering, Marketing, Sales, and Customer Success, all of whom play a critical role in shaping the event's content.

The importance of cross-functional collaboration is emphasized in **3048R Sales and Marketing Alignment ELC#4: Practical Techniques to Get Aligned**, which highlights the value of Joint Planning Sessions to integrate sales into marketing decisions. By involving not only sales but also individuals from various departments, we aimed to create a more comprehensive and impactful agenda. Each team member brings unique insights and customer interactions, enriching the overall event experience.

We also ensured to schedule Pre-Event and Post-Event briefs for all our events. **3011R How to Grow Your Brand ELC#6: Team** describes the importance of clearly defining the event team's role and how this impacts the attendee experience. Our Pre-Event brief acted as training for our staff, to align the onsite team with their defined roles, the attendee experience, and how the attendee experience ties back to our event brand. As underscored in **2072R How To Train Booth Staff ELC#1: Our Framework**, it is important to make the team care about the event, make them aware of their responsibility in ensuring the event is a success, and agreeing to hold one another accountable. Clearly defining who will handle guest directions, manage the registration table, oversee the Solution Center, and deliver presentations helped minimize confusion on the event day. We also discussed arrival times, room setup, hotel check-out times, luggage storage, airport shuttle information, and dress code.

We devised a comprehensive project management process with the following meeting schedule:

INITIAL PLANNING MEETING	STATUS MEETINGS	PRE-EVENT BRIEFS	POST EVENT DEBRIEFS	STAKEHOLDER DEBRIEF
<ul style="list-style-type: none"><li>-At the beginning of the year, includes Event Stakeholders</li><li>-Discuss event strategy.</li><li>-Determine event objectives.</li></ul>	<ul style="list-style-type: none"><li>-Every other week after program kickoff, includes Event Planning Committee</li><li>-Report on event logistics.</li><li>-Go over marketing and sales outreach.</li></ul>	<ul style="list-style-type: none"><li>-One week before every event, including all onsite team members.</li><li>-Go over specific event logistics for onsite team.</li></ul>	<ul style="list-style-type: none"><li>-After the conclusion of the event, including all onsite team members.</li><li>-Discuss what went well and did not go well.</li><li>-Review survey results.</li></ul>	<ul style="list-style-type: none"><li>-After the final event concludes, including Event Stakeholders.</li><li>-Review event metrics and reporting.</li><li>-Discuss next year's program.</li></ul>



# CRITERIA #4

## MANAGEMENT OF EXHIBIT DESIGN & PRODUCTION

MANAGEMENT OF EVENT DESIGN



## EVENT MANAGEMENT AND PLANNING

### VENUE SELECTION PROCESS

**6008R 10 Steps to a Great Corporate Event ELC#6: Selecting the Right Audience**, explains the importance of choosing the right venues as it is a highly influential factor in attendance. To determine locations that would ensure the best potential attendance rate, we analyzed customer data from our CRM to identify the largest hubs of our customer population in the U.S. The following areas emerged with the highest concentrations of our customers:

- Southern California - Anaheim
- South Central Texas - Dallas
- Southeast - Atlanta
- Great Lakes - Rosemont
- Northeast - Philadelphia
- Northeast - Columbus

Selecting our venues required careful consideration of several event elements to ensure the best experience for our attendees. Since this is a one-day event, we prioritized venues that were easily accessible to a broader region, not just the host city. To achieve this, we strategically chose locations near major airports, following guidance from our executive team. We looked for venues that could accommodate our capacity of 50 guests and 10 Minitab staff members. **6008R Basics of Event Planning and Management ELC#6: Selecting the Right Venue** also underscores the importance of conducting site visits to help ensure you are considering the correct venues. While I could not conduct on-site inspections beforehand, I relied on venue photographs and virtual tours from both the hotels and the Cvent Supplier Network to make informed decisions.

When selecting dates, we avoided Mondays and Fridays, as many people work from home on these days. We also avoided holiday weeks like Memorial Day and Labor Day. Starting from April, it allowed us to secure contracts at the beginning of the new year. We avoided July due to summer holidays, recognizing that many people might not be available. Additionally, we skipped the last week of each month due to increased business activity and limited availability of our sales staff. As a result, all our events are scheduled on Tuesdays or Thursdays in the second or third week of the month, from April through October, except for July. To minimize weather disruptions, we scheduled events in colder regions during warmer months.

After identifying the cities for our events, we used the Cvent Supplier Network to submit Requests for Proposals (RFPs) to multiple venues in each city. This allowed us to compare offers and make an informed decision.



# MANAGEMENT OF EVENT DESIGN

As directed in **6010R The Basics of Event Planning and Management ELC#5: Developing an RFP** and Selecting Vendors, we considered several criteria:

- Hotel Rating: We focused on four- or five-star hotels.
- Location: We focused on the cities determined in our CRM analyzation.
- Venue: We focused on hotels that are equipped to handle corporate meetings.
- Proximity to the Airport: Convenience for attendees traveling from various locations.
- Capacity: The venue needed to accommodate 50 guests and 10 employees, with additional room for growth.
- Sleeping Room Block: We required a block rate for 10 rooms for our staff.
- Budget: We focused on hotels that stayed within our \$25,000 budget.

After receiving multiple proposals, our key decision factors included the venue's proximity to the airport, the suitability of the meeting space, and the overall cost of hosting the event. Please see Appendix A for a view of the full RFP template that was used.

## CONTRACTING

**4007R Exhibit Law Primer ELC#3: Contract Clauses and Your Liability** lists important contract clauses that event planners need to be aware of. We made sure to analyze all hotel contracts within our own procurement and legal departments on items such as indemnity, force majeure, and confidentiality clauses. To approve all contracts, we made it a requirement for a force majeure clause to be included. This requirement is due to the aftermath of the 2020 pandemic and its impact on the event industry. If a contract from a hotel did not include verbiage directly related to a pandemic or epidemic, we requested this language be incorporated into the contract for approval. Please see Appendix B for a view of the full Force Majeure clause.

## 2024 EXCHANGE EVENT PROGRAM

After finalizing all contracts, our Minitab Exchange event program for 2024 was as follows:

**EXCHANGE ATLANTA** - APRIL 11 AT EMBASSY SUITES BY HILTON ATLANTA AIRPORT

**EXCHANGE PHILADELPHIA** - MAY 16 AT DELTA HOTEL PHILADELPHIA AIRPORT

**EXCHANGE ROSEMONT** - JUNE 18 AT HILTON ROSEMONT/CHICAGO O'HARE

**EXCHANGE COLUMBUS** - AUGUST 15 AT EMBASSY SUITES COLUMBUS AIRPORT

**EXCHANGE DALLAS** - SEPTEMBER 10 AT SHERATON DFW AIRPORT HOTEL

**EXCHANGE ANAHEIM** - OCTOBER 10 AT HILTON ANAHEIM



# MANAGEMENT OF EVENT DESIGN

## EVENT DESIGN AND EXPERIENCE

Our goal for the customers' experience at our events is to create a seamless and welcoming atmosphere from the moment they arrive. **3011R How to Grow Your Brand ELC#4: How to Integrate Brand Goals with Traditional Measurement Activities** explains the importance of understanding and mapping the event experience to ensure that the audience interaction path is well designed for increased engagement. Upon entering the hotel, attendees will be welcomed by our staff stationed in the lobby with branded signage, providing an immediate touchpoint and first impression. Our team will offer directions to the meeting space and assist with any parking issues. Directional signage throughout the hotel will guide them to the meeting area. Because attendees have been exposed to our marketing promotions, they are already familiar with our event brand, which helps them easily navigate the venue and find our meeting area.



*Directional Signage*



*Welcome Desk*

At the meeting space, attendees will be greeted at our branded welcome desk, where staff will express gratitude and provide name badges, journals, pens, agendas, and giveaways. After registering, guests can find their seats and visit our Solutions Center to connect with subject matter experts. The half-round crescent seating allows space for laptops and ensures a clear view of the screen. Two repeater monitors will be set up to enhance visibility for all attendees.



*Example of Event Set Up*



*Example of Event Set Up*



# MANAGEMENT OF EVENT DESIGN

## SOLUTION CENTER

To enhance our software demos and give customers the opportunity to explore our full range of solutions beyond the day's presentations, we set up a Solution Center at the event. The Solution Center acts as a "mini" exhibit area within our larger meeting space. The Solution Center consists of three stations that guests can visit during the morning session, breaks, lunch, and a designated time at the end of the day. Each station is equipped with a table, branded product banners, a monitor, and a staff member ready to assist attendees with any questions. We assign a Minitab employee to each station, ensuring that the person is a subject matter expert for the solutions being demonstrated. This ensures that guests receive knowledgeable support and can have their questions answered effectively throughout the event. These stations will be organized to cover all eight of our products, with specific stations dedicated to product categories.

### STATION 1

Minitab Engage  
Minitab Workspace

### STATION 2

Minitab Statistical Software  
Education Hub  
Salford Predictive Modeler

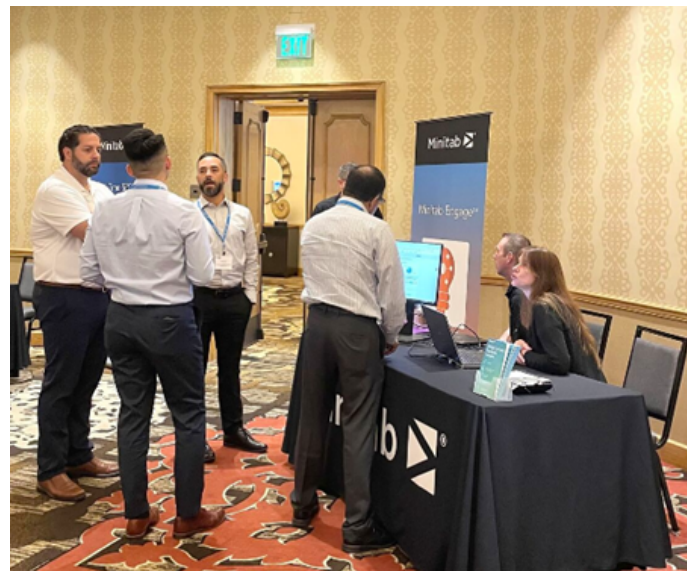
### STATION 3

Minitab Connect  
Real-Time SPC  
Minitab Model Ops

We have made sure that the product logos are placed at eye level, as **6020R The @Show Experience ELC#6: Human Factors** explains that the ideal messaging zone is where important information is most easily viewed. This allowed guests to quickly locate the stations they are interested in with minimal effort.



Example of Solution Center Station



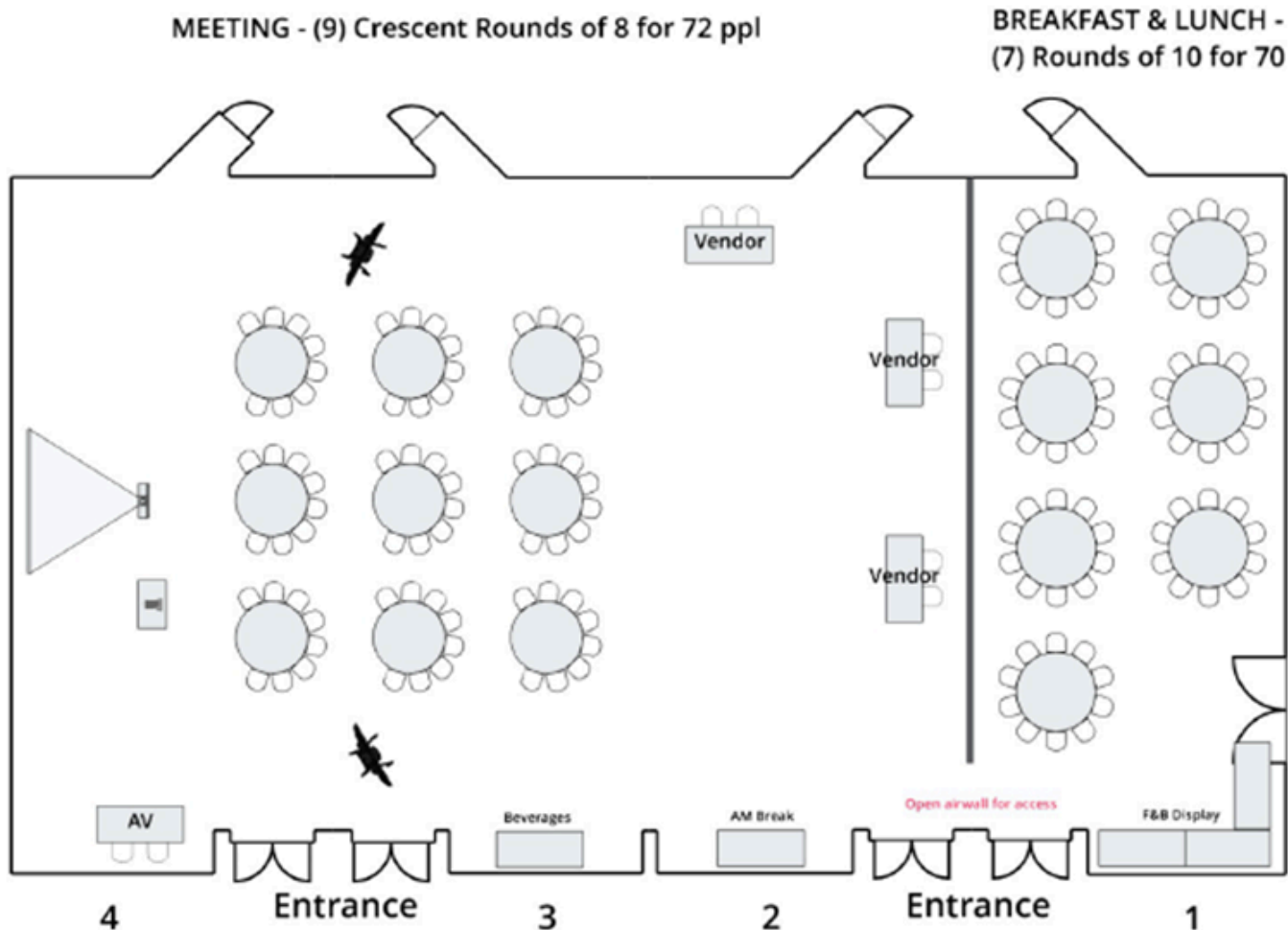
Example of Solution Center Station



# MANAGEMENT OF EVENT DESIGN

## FLOORPLAN

Here is a floor plan of our event from the Minitab Exchange Dallas event, which encapsulates all the above information.



## SESSION DEVELOPMENT

Our event agenda was designed to provide a comprehensive and engaging experience for our attendees. I learned from **6008R 10 Steps to a Great Corporate Event ELC#5: Content Is King**, the importance of developing content that provides true value for attendees. While marketing and promotions can get an attendee to the event, the content will keep them coming back.

We maintained the same agenda at each event to ensure consistency in delivering our message. The only variation was the Speaker Spotlight session, where a customer speaker was invited to present on a topic that was most relevant to their own experiences. Please see specific information on our sessions on the following page.



# MANAGEMENT OF EVENT DESIGN

**New Product and Solution Features:** We start with a session led by our product managers, who present updates and upcoming features of our products. This gives customers a sneak peek at future releases, stimulates interest in new developments, and allows our product managers to gather valuable feedback directly from users.

**Speaker Spotlight:** Next, we feature a guest speaker who is an expert in statistical analysis. This session allows our attendees to hear from an industry professional, positioning us as thought leaders and offering our customers fresh insights from outside our company. Well-known guest speakers help boost event awareness and registrations.

**Best Practices with Minitab Statistical Software:** The third session focuses on best practices for using our flagship product, Minitab Statistical Software. Delivered by one of our top trainers or consultants, this session provides in-depth tips and tricks, ensuring attendees gain the most value from their use of our product.

**Interactive Workshop:** We host an interactive workshop where customers can give direct feedback to our research and design team. This session is designed as a roundtable focus group, with each table moderated by a company employee. Attendees discuss potential product enhancements and features, contributing to future development.

**Solution Spotlight:** Our final session features our solution architects from the sales team, who present information about our other software solutions. This helps customers broaden their awareness of our full product suite and creates opportunities for cross-selling and upselling.

Following the sessions, we conduct a giveaway based on survey responses and invite guests to connect with us at the Solution Center. This final interaction provides additional opportunities for engagement and information exchange. The event agenda is posted on our event website to give potential attendees a preview of what to expect. This transparency helps to entice them to register and attend by highlighting the engaging sessions and valuable opportunities available at the event.

## REGISTRATION

**1008R How to Measure the Value of Trade Show Participation Part 1 ELC#1: You Can Do It, Measurement is Doable** underscores that to successfully measure and report on our event metrics you must have proper coordination and planning from the beginning of our event process. We started with an effective registration collection tool. To manage event registrations, we use Cvent, which allows us to efficiently gather contact information, ask questions related to specific guest needs, and send confirmation, modification, and cancellation emails for the event. This platform helps us monitor registration numbers and ensure we are on track for successful attendance.



## MANAGEMENT OF EVENT DESIGN

Our Cvent registration is integrated with HubSpot and Power BI dashboards, enabling real-time sharing of registration data with our sales team. This integration allows our sales team to access a live dashboard, showing who has registered for each event and the companies they represent.

On-site, we utilize Cvent's OnArrival software to track attendance. This provides us with real-time data on how many guests attended versus those who registered and allows us to send follow-up communications post-event based on this accurate attendance data.

An important aspect of our event planning is gathering information from our guests regarding dietary restrictions, allergies, and any specific requirements for their audiovisual or mobile experience. This information is collected during the registration process to ensure we can meet their needs on-site.

### LOGISTICAL AND OPERATIONAL EVENT ELEMENTS

As explained in step 3 of **6010R Basics of Event Planning ELC#3: Setting Up Trade Show For Success with Project Management**, it is important to determine your event milestones and work backwards. To effectively track progress on our planning execution for these events, I created a task template through the ASANA platform which automatically determines and sets deadlines based on the event date. I utilized this task list for all the Minitab Exchange event project management planning elements. Please see Appendix C for a full ASANA to do list in the addendum.

We developed specific criteria to identify our on-site team, focusing on who should attend and the role they would play at the event. Sales and customer success team members were selected based on having key accounts registered, with their primary role being to network and support those customers. Additionally, members of our training, consulting, and pre-sales solutions teams were sent to deliver presentations and provide technical support to customers at the Solution Center. This structure ensured that each attendee had a clear purpose aligned with customer engagement and event goals.

### DETERMINING OUR ONSITE TEAM

Understanding from **1009R How to Measure the Value of Trade Show Participation Part 2 ELC#3: Estimate Appropriate Event Budgets, Staff and Exhibit Sizes** that too many staff members is a major impact on the cost of an event, we took measures to ensure an appropriate number of staff were sent to each show. To maintain an appropriate staff-to-attendee ratio, we follow a 6:1 rule—meaning for every six registrations, we send one Minitab employee.

Since these events are held in different cities across the country, the attending employees vary based on their location and, for the sales team, which of their accounts have registered for the event. While the presenters typically remained consistent, the sales team members rotate depending on the region.



# MANAGEMENT OF EVENT DESIGN

## REHEARSAL

To ensure everything in the event space is set up according to plan and that our audio visual equipment functions correctly, we schedule a rehearsal the day before the event. **6011R The Basics of Event Logistics and Implementation Part 2 ELC#1: The Pre-Production and Vendor Meeting** explains the importance of a pre-production and vendor meeting to introduce everyone, set the tone, and establish rules of communication. I scheduled meetings with the catering banquet manager, audio visual team, and event manager the day before every event to establish rules of communication and review the implementation of our event for the following day. We also require all on-site staff to assist with room setup and have presenters test their laptops and connections to confirm everything is working properly. This rehearsal helps us address any potential issues in advance and ensures a smooth experience on the day of the event.

## LEAD RETRIEVAL

As noted in **1014 You Know What to Measure – But How Do You Actually Measure It ELC#4: Leads**, to help our on-site sales team gather essential information from attendees, we provided paper lead retrieval sheets that can be used to capture details for follow-up for the last two events. These lead retrieval sheets included fields for guests' interest in specific products, follow-up steps, and their contact information to focus on MQL and SQL's. The sales team was informed about the availability of these forms during our pre-event briefing.

## AUDIO VISUAL

The format of this event consists of a full day of presentations. To ensure the presentations run smoothly, we identified the following audio visual requirements:

- **Projector and Screen:** We request the largest possible projector screen, ideally 10x10 feet, to ensure clear visibility. Since our presentations focus on demonstrating our software solutions through on-site demos, it is crucial that our guests have a clear view of the screen to fully engage with the software demonstrations.
- **Repeater Monitors:** To enhance visibility for those seated further from the front, we will provide repeater monitors on both sides of the room. These monitors will be positioned towards the back to ensure that guests who do not have a direct view of the main screen can still follow along with the presentation.
- **Lavalier Microphones:** We require lavalier microphones for our presenters so they can remain hands-free and move freely around the room, facilitating better interaction with attendees.
- **Power for Solution Center Stations:** At the back of the room, we will set up three Solution Center stations, each equipped with monitors for software demos. These stations will need access to electricity to power the equipment.



# MANAGEMENT OF EVENT DESIGN

- Internet Access: I request the internet details ahead of time so that we can include them in our presentation slides and printed materials, ensuring guests have access to the information as soon as they arrive.
- Audio Setup: We require speakers and microphones throughout the room, as well as an on-site audio technician for the entire day of the event and the day prior for rehearsal. This will allow us to test all equipment and make sure everything is functioning correctly.

These measures help us create a seamless and professional experience for our attendees, ensuring that all technical aspects are covered. **6011R The Basics of Event Logistics and Implementation Part 2 ELC#2: The Pre-Production Schedule and Run of Show** explains the necessity of sharing documents with your vendors to help ensure everyone is aligned with the live event actions. I provided a Run of Show at the last two events for the audio-visual team to understand who needs a lavalier microphone and when. Please see Appendix D for an example of a Run of Show.

## SURVEY

**1008R How to Measure the Value of Trade Show Participation Part 1 ELC#11: Other Measures – Efficiency Measures**, emphasized that capturing guest feedback on their attitudes and perceptions of the event is crucial for effectively evaluating its success. Therefore, we provided paper surveys during the lunch break and encouraged attendees to complete them by the end of the event. We found that offering paper surveys yields a higher response rate compared to sending out electronic versions via email, as the open rates for post-event emails tend to be low.

To make the surveys more enticing, we offer them as an exchange for raffle tickets, allowing participants to enter a giveaway for fun items such as t-shirts or other branded event materials. This serves as a wonderful way to conclude the event, distribute branded items that extend our event's visibility, and provide additional training opportunities to strengthen our customer relationships.

The survey questions are carefully designed to gather feedback on key event aspects that are related to our measurable goals, such as how attendees heard about the event, their opinions on the sessions, the suitability of the event's date and location, which products they're interested in learning more about, and whether they found the event valuable and would recommend it to a colleague.

After the event, we collected and analyzed the survey responses, sharing the insights with the team. If a guest indicated on the survey that they would like to be followed up with by a sales representative, I shared their contact information with the respective sales team members. Please see Appendix E for a view of our survey.



## BUDGET

### BUDGET PLAN VS. ACTUAL

Our budget was \$25,000 for each event, totaling \$150,000 for the year with 6 events. **2003R The Nuts and Bolts of Budgeting for Results ELC#2: The Absolute Basics** explained how ballparking is the best way to accurately estimate the cost to exhibit or host an event. Our average cost for our Minitab Exchange events in 2023 was \$16,000. We felt confident that we could work with a \$25,000 budget per event knowing our previous historical data. The information on our budget for 2024 will also be extremely useful when estimating for our 2025 budget using the ballparking method.

Our budget comes out of the event marketing budget. To estimate the cost of proposed venues, I calculated expenses for 10 sleeping rooms, meeting space, lunch, and breakfast for 50 people, all-day beverages for 50 attendees, and any applicable parking or shipping fees. I made sure to include taxes and service charges in these estimates. Additionally, if the food and beverage minimum exceeded the estimated cost, I used that number in my calculations. I was also provided with a budget of \$3,500 per event for social media promotions upfront. For freight shipping, based on the average cost of \$500 per shipment, I allocated \$1,000 per event for shipping expenses. Travel falls into a different budget than the marketing events budget, so it is not included in this analysis.

The tables on the following page reflect the budgeted and actual costs for all six of our events.



# MANAGEMENT OF EVENT DESIGN

## BUDGET PLAN VS. ACTUAL

BUDGET ITEM	ATLANTA BUDGET	ATLANTA ACTUALS
Food + Beverage	\$ 4,671.86	\$ 7,214.94
Audio Visual	\$ 1,100.00	\$ 1,783.69
Meeting Space	\$ 1,581.00	\$ 1,002.08
Sleeping Rooms	\$ 1,948.30	\$ 2,532.79
Parking	\$ 375.00	\$ 248.00
Miscellaneous	\$ -	\$ 64.80
Shipping	\$ 1,000.00	\$ 816.90
LinkedIn	\$ 3,500.00	\$ 3,500.00
Promotional Items	\$ 1,000.00	\$ 1,565.00
<b>GRAND TOTAL</b>	<b>\$ 15,176.16</b>	<b>\$ 18,728.20</b>

BUDGET ITEM	PHILADELPHIA BUDGET	PHILADELPHIA ACTUALS
Food + Beverage	\$ 3,575.00	\$ 7,761.07
Audio Visual	\$ 3,000.00	\$ 2,925.57
Meeting Space	\$ 3,900.00	\$ 2,925.00
Sleeping Rooms	\$ 2,044.20	\$ 2,210.52
Parking	\$ 625.00	\$ 435.14
Miscellaneous	\$ -	\$ 68.60
Shipping	\$ 1,000.00	\$ -
LinkedIn	\$ 3,500.00	\$ 3,493.66
Promotional Items	\$ 1,000.00	\$ 130.00
<b>GRAND TOTAL</b>	<b>\$ 18,644.20</b>	<b>\$ 19,949.56</b>

BUDGET ITEM	ROSEMONT BUDGET	ROSEMONT ACTUALS
Food + Beverage	\$ 6,385.00	\$ 14,374.86
Audio Visual	\$ 5,469.39	\$ 4,761.63
Meeting Space	\$ -	\$ -
Sleeping Rooms	\$ 2,546.60	\$ 2,889.90
Parking	\$ 725.00	\$ 840.00
Miscellaneous	\$ -	\$ -
Shipping	\$ 1,000.00	\$ 1,923.90
LinkedIn	\$ 3,500.00	\$ 3,486.09
Promotional Items	\$ 1,000.00	\$ 2,445.25
<b>GRAND TOTAL</b>	<b>\$ 20,625.99</b>	<b>\$ 30,721.63</b>

BUDGET ITEM	COLUMBUS BUDGET	COLUMBUS ACTUALS
Food + Beverage	\$ 4,532.50	\$ 7,173.91
Audio Visual	\$ 3,383.67	\$ 898.38
Meeting Space	\$ 838.00	\$ 618.25
Sleeping Rooms	\$ 1,601.00	\$ 2,812.95
Parking	\$ -	\$ -
Miscellaneous	\$ -	\$ -
Shipping	\$ 1,000.00	\$ -
LinkedIn	\$ 3,500.00	\$ 3,499.43
Promotional Items	\$ 1,000.00	\$ 1,093.10
<b>GRAND TOTAL</b>	<b>\$ 15,855.17</b>	<b>\$ 16,096.02</b>

BUDGET ITEM	DALLAS BUDGET	DALLAS ACTUALS
Food + Beverage	\$ 6,707.81	\$ 10,475.89
Audio Visual	\$ 8,945.89	\$ 8,945.89
Meeting Space	\$ 1,190.75	\$ 2,129.00
Sleeping Rooms	\$ 1,993.50	\$ 5,247.45
Parking	\$ -	\$ -
Miscellaneous	\$ -	\$ 671.15
Shipping	\$ 1,000.00	\$ 1,195.00
LinkedIn	\$ 3,500.00	\$ 3,480.24
Promotional Items	\$ 1,000.00	\$ 1,781.70
<b>GRAND TOTAL</b>	<b>\$ 24,337.95</b>	<b>\$ 33,926.32</b>

BUDGET ITEM	ANAHEIM BUDGET	ANAHEIM ACTUALS
Food + Beverage	\$ 10,540.00	\$ 13,499.66
Audio Visual	\$ 5,000.00	\$ 17,024.19
Meeting Space	\$ -	\$ 500.00
Sleeping Rooms	\$ 2,027.30	\$ 2,039.93
Parking	\$ 646.50	\$ 764.00
Miscellaneous	\$ -	\$ 1,160.00
Shipping	\$ 2,000.00	\$ 2,000.00
LinkedIn	\$ 3,500.00	\$ 2,950.00
Promotional Items	\$ 1,000.00	\$ 942.25
<b>GRAND TOTAL</b>	<b>\$ 24,713.80</b>	<b>\$ 40,880.03</b>



# CRITERIA #5

## MANAGEMENT OF INTEGRATED MARKETING COMMUNICATION



# INTEGRATED MARKETING COMMUNICATION

## PLANNING & GOALS

To align with our event objectives, I began by addressing the two key planning questions from **1008R How to Measure the Value of Trade Show Participation ELC#7: Two Key Planning Questions**. The first question asks, “Who can perform our desired action?” For these events, our target audience was our existing customers. This required us to select marketing tactics that effectively reach our established customer base and shift our messaging to deepen customer engagement and support. With ongoing marketing campaigns directed at our existing customers, we leveraged the same communication channels to promote the event program, ensuring consistent reach.

Our customer base consists of individuals dedicated to improving processes and reducing costs or waste through data-driven analysis. We knew that those most interested in attending this event are not senior-level executives but practitioners actively applying their expertise daily. Consequently, our messaging underscored the event’s focus on this audience with high-quality presentations that would bring immediate value to take back with them to their jobs. Phrases such as “unlock the value of your data” and “walk away with new skills for immediate impact” were used to resonate with this audience

Join us for a Complimentary Minitab Exchange  
as we come together to help you unlock the value of  
your data to achieve your desired outcomes.

*Messaging used on Event Website*

The second question asks, “What action do we want them to take?” Our objective was for attendees to engage in the event, collaborate with peers, and connect with our subject matter experts. We designed our messaging to align closely with the event’s branding as an “Exchange.” Drawing on insights from **2008 Ten Strategies to Generate More Top-Quality Booth Traffic ELC#2: Foundational Elements** which described the importance of making your pre-show marketing feel personal by shifting your phrasing away from “I” and “Us,” we personalized our pre-event marketing with phrases like “We want to hear from you.” This centered our customers in the communication and made it feel more personal. We also highlighted opportunities for this audience to interact directly with our Research and Design Team and gain an inside look at upcoming features, reinforcing their value and importance to our organization.



*Messaging used on Event Website*



*Messaging used on Event Website*



# INTEGRATED MARKETING COMMUNICATION

## PRE-EVENT TACTICS

I learned from **3015R Integrated Marketing Communications ELC#7: Pre-Event Channels – Reaching Attendees in Their Space** the steps to define pre-event marketing tactics include: reviewing our objectives, considering possible tactics, evaluating their potential to meet our objectives, and estimating costs and prioritizing. Utilizing these steps, we were able to recognize where our customers are most active and strategically utilize these spaces to promote our event program to maximize engagement.

### LINKEDIN

Our content development team leveraged targeted and sponsored posts on LinkedIn to promote the event program. Our customers actively engage with us on LinkedIn, making it an important platform to promote our Minitab Exchange program. **1008R How to Measure the Value of Trade Show Participation ELC#6: Event Marketing Critical Success Factors to Deliver ROI** explains how to effectively market your event, you must reach the right people, with the right message to deliver the right action or CTA. To reach the right people, we utilized LinkedIn's targeting capabilities to target our posts to the following groups:

The screenshot shows a LinkedIn post from the Minitab company page. The post header includes the Minitab logo, 98,687 followers, and a post from 5 months ago. The main text of the post reads: "Join us on June 18th for our complimentary Minitab Exchange event. By attending this customer community event, you'll have the opportunity to network and engage with industry experts, improving your data analysis skills." Below the text is a registration link: "Register now: <http://4wrd2.com/8c72wtM>". The post also includes the hashtags "#Minitab #MinitabExchange #Rosemont #Chicago". The main image of the post features a cityscape with the text "Minitab EXCHANGE" overlaid. Below the image, the event details are listed: "ROSEMONT | JUNE 2024". At the bottom, there are two sections: "DATE & TIME: Tuesday, June 18th 7:30 AM to 4:00 PM" and "VENUE & LOCATION: Hilton Rosemont/Chicago O'Hare 5550 North River Road, Rosemont, IL 60018". A red "REGISTER NOW" button is also present.

Pre-Event LinkedIn Post Example

#### MEMBER SKILLS

- Manufacturing Engineering
- Continuous Improvement
- Industrial Engineering
- Lean Management
- Quality Management

#### JOB FUNCTIONS

- Manufacturing
- Engineering
- Operations
- Program and Project Management
- Quality Assurance

#### INDUSTRIES

- Manufacturing
- Technology
- Supply Chain and Storage
- Hospitals and Health Care
- Oil and Gas

Please refer Appendix F to see the LinkedIn pre-event marketing communication schedule.

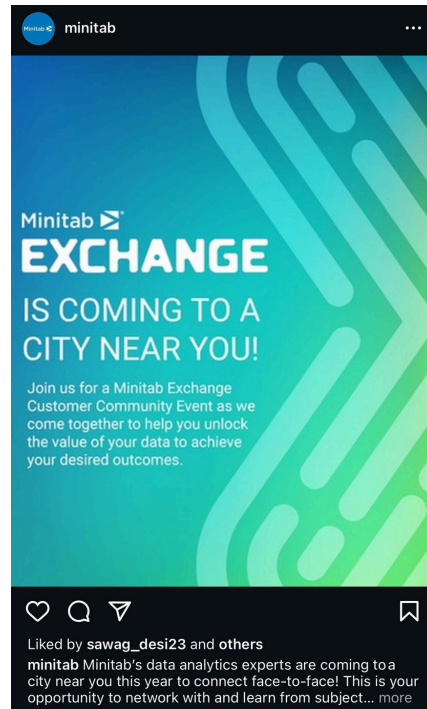


# INTEGRATED MARKETING COMMUNICATION

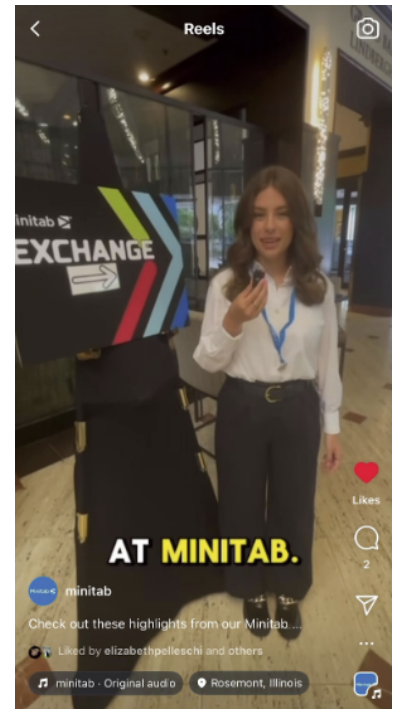
## PRE-EVENT TACTICS

### INSTAGRAM

**3015R Integrated Marketing Communications ELC#2: Know Your Target Audience and Sources of Information** emphasized the importance of understanding where your customers "live." Minitab began a corporate Instagram account last year, and so we recognize that our customers are not as active on this platform yet. Therefore, we incorporated this marketing tactic into our pre-event marketing strategy to increase event brand awareness but did not prioritize it as much as other tactics. Please refer Appendix G to see the Instagram pre-event marketing communication schedule.



Pre-Event Instagram Post Examples



### EMAILS

The USA marketing team created location-specific email campaigns for each region. Location-specific emails were sent to customers within a 4-state radius of the event city. They also sent promotional emails on behalf of account managers who have customers in those regions. Targeted email campaigns allowed us to reach relevant audiences without overloading our entire customer base. Please refer to Appendix H to see the email pre-event marketing communication schedule.

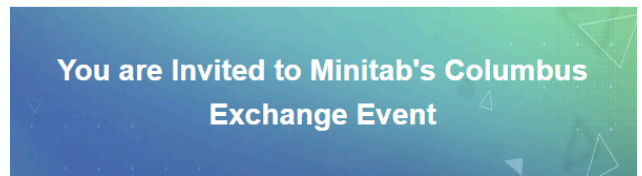
We also created an email signature graphic for sales and customer success teams to use in their communications with customers, aiming to broaden our reach, increase awareness, and spark interest in the event.



Email Signature



Statistical and Data Analysis Tools Anyone Can Use



Hello there,

Please join us on August 15th for Minitab Exchange in Columbus, Ohio! During this complimentary, one-day, in-person event you will meet with Minitab subject matter experts who will guide you through getting the most out of your data through interactive workshops and best practices.

You will have the opportunity to network with your peers, exchange ideas, and learn how others use data-driven insights to solve problems.

We are excited to announce that Scott C. Sterbenz, P.E., Six Sigma Black Belt at Ford Motor Company is our Spotlight Speaker for this event! Hear how Scott leverages data to solve problems and identify areas for improvement.

**When:** Thursday, August 15th, from 7:30 AM to 4:00 PM

**Where:** Columbus, OH [see event page for details](#)

**Cost:** Complimentary ([accept your invite](#))

[Accept Invite!](#)

This event is not recorded so don't miss out on the opportunity! [Register today!](#)

Please visit our [Minitab Exchange home page](#) for the full lineup of talks.

We look forward to seeing you in August!

The Minitab Team

Pre-Event Email Example

# INTEGRATED MARKETING COMMUNICATION

## PRE-EVENT TACTICS

### WEBINARS

Throughout the year, we highlighted our event program at the end of 10 webinars. These webinars were attended by a total of 11,674 people. By promoting the entire event program at the end of each session, we aimed to raise awareness and generate interest among attendees from existing customers in various regions.

### INDUSTRY TRADE SHOWS

We created postcards featuring our entire event program to distribute at the American Society for Quality World Conference. The objective was to raise awareness and promote the event among trade show attendees who visited our booth.

### INDUSTRY MAGAZINE ADS

We collaborated with industry magazine publishers to place ads in their publications, aiming to raise awareness within our target audience, including professionals in operational excellence and Lean Six Sigma.

Are you ready to harness the full potential of your data and maximize the power of Minitab solutions? Join us at Minitab Exchange, a premier customer event hitting multiple cities across the United States.

### UNLOCK THE POWER OF MINITAB

This exclusive, complimentary, opportunity is available for Minitab customers seeking best practices and deeper skill sets that lead to immediate business value and expanded knowledge.

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### YOUR DATA EXCHANGE

**PHILADELPHIA**  
May 16, 2024

**ROSEMONT**  
June 18, 2024

**COLUMBUS**  
August 15, 2024

**DALLAS**  
September 10, 2024

**ANAHEIM**  
October, 2024

Minitab

Postcard for Trade Show

Minitab **EXCHANGE**  
**IS COMING TO A CITY NEAR YOU!** [LEARN MORE!](#)

Ad Placed in Industry Magazine Publication

### WEBSITE

To centralize all event details, we developed a dedicated event website that listed all cities, dates, and venues, allowing customers to easily locate the nearest event. This also enabled customers to share the program with colleagues at other locations, further promoting the event. The website featured the event agenda highlighting key benefits. Since our customers frequently visit our main site, we also created a prominent section for the program on the events page to maximize visibility.

MINITAB EXCHANGE  
**ATLANTA | APRIL 2024**  
DATE & TIME: Thursday, April 11th  
7:30 AM to 4:00 PM  
VENUE & LOCATION: Embassy Suites by Hilton Atlanta Airport  
4750 Southpark Road, Atlanta, GA 30337

MINITAB EXCHANGE  
**PHILADELPHIA | MAY 2024**  
DATE & TIME: Thursday, May 16th  
7:30 AM to 4:00 PM  
VENUE & LOCATION: Delta Hotel Philadelphia Airport  
525 Sevens Dr, Philadelphia, PA 19115

MINITAB EXCHANGE  
**ROSEMONT | JUNE 2024**  
DATE & TIME: Tuesday, June 18th  
7:30 AM to 4:00 PM  
VENUE & LOCATION: Hilton Rosemont Chicago O'Hare  
8333 North River Road, Rosemont, IL 60018

MINITAB EXCHANGE  
**COLUMBUS | AUGUST 2024**  
DATE & TIME: Thursday, August 15th  
7:30 AM to 4:00 PM  
VENUE & LOCATION: Embassy Suites Columbus Airport  
2888 Airport Drive, Columbus, OH 43229

Event Details from Event Website



# INTEGRATED MARKETING COMMUNICATION

## PRE-EVENT INTEGRATED MARKETING COMMUNICATIONS

COMMUNICATION METHOD	RATIONALE	TARGET AUDIENCE	MEASURABLE GOAL	ASSESSMENT METHOD	RESULTS	RECOMMENDATIONS
LinkedIn Posts	Wide reach to customers to create awareness and stimulate interest	LinkedIn users who are Minitab customers	Goal is to achieve a higher-than-average engagement level of 3.8%	LinkedIn Performance Report	3.24% average engagement level	<ul style="list-style-type: none"> <li>-We only posted three times to promote the Exchange brand for the year and need to increase this for next year.</li> <li>-Post the entire yearly program with dates and locations, making it easier for people to see all regions briefly.</li> <li>-Individual city posts should be tailored to specific job titles, industries, and locations for more targeted engagement and higher visibility. These need to be consistent and more of them.</li> </ul>
Instagram Posts	Wide reach to customers to create awareness and stimulate interest	Instagram users who are Minitab customers	Goal is to reach 100,000 Impressions	Instagram Performance Report	259,600 total impressions	<ul style="list-style-type: none"> <li>-Although we reached out goal, we only posted 3 Exchange event posts on LinkedIn in 2024 from two of our events, underscoring our need to utilize the platform more in the future.</li> <li>-Our Instagram posts should follow a more consistent schedule, both highlighting each individual city and the entire yearly program.</li> </ul>
Targeted Emails	Inform existing customers about Exchange event close to them	Minitab customers in 4 state radius to Exchange event	Goal is to achieve an average of 2,000 unique email opens per event	HubSpot Reporting Metrics	2,194 average email opens per event	<ul style="list-style-type: none"> <li>-Our email campaigns should follow a more consistent schedule as each region had a different number of posts.</li> <li>-Our email campaign should include a nurture email sequence for anyone who opened email but did not register.</li> <li>-Ensure that a Know Before You Go email is sent for all events.</li> </ul>
Targeted Emails from Sales Representatives	Inform existing customers about Exchange event close to them	Minitab customers in key accounts that sales want to reach at event	Goal is to achieve 250 unique email opens per event	HubSpot Reporting Metrics	262 average email opens per event	<ul style="list-style-type: none"> <li>-Include more salespeople to reach wider audience.</li> <li>-Incorporate adding targeted emails from sales representatives for promotions to entire event program as well as for individual events.</li> </ul>
Email Signatures	Wide reach to customers to create awareness and stimulate interest	Minitab customers	Ensure sales and customer success team is utilizing signature in emails	Sales and customer success email signatures	Did not track this information	<ul style="list-style-type: none"> <li>-Ask sales and customer success leadership to direct teams to update their email signatures.</li> <li>-Add tracking to URL to capture leads.</li> </ul>



# INTEGRATED MARKETING COMMUNICATION

## PRE-EVENT INTEGRATED MARKETING COMMUNICATIONS

COMMUNICATION METHOD	RATIONALE	TARGET AUDIENCE	MEASURABLE GOAL	ASSESSMENT METHOD	RESULTS	RECOMMENDATIONS
Webinar Promotion	Wide reach to webinar attendees to create awareness and stimulate interest	Minitab webinar attendees	Goal is to reach 10,000 Impressions	Report on How Many	Reached 11,674 impressions	-Incorporate event promotion in all webinars next year. -Add QR code with tracking URL to see who came to event website from Webinars.
American Society for Quality Trade Show Postcards	Targeted reach for awareness to industry audience (Lean Six Sigma)	American Society of Quality World Quality of Continuous Improvement attendees	Goal is to give out 100 postcards at trade show	Count how many were given out	Handed out 25, Had 2 Exchange attendees from this promotion	-Prepare all trade show kits with Exchange Post Cards. -Train booth staff to promote Exchange events at trade shows. -Train booth staff to put the postcard inside of our trade show brochures when handing them out.
Industry Magazine Ads	Targeted reach for awareness to industry audience (Operational Excellence/Lean Six Sigma)	Magazine readers who are Minitab customers	Goal is to get 200 Event Website page views from publications.	HubSpot Reporting Metrics	77 Event Page Views from publications	-Did not get insight into how many people viewed magazine ads from publishers and need to request this information ahead of time. -Add tracking to URL to capture leads.
Minitab Events Page on Website	Wide reach to customers for awareness to create and stimulate interest	Minitab customers	Goal is to get over 10,000 page views on page	Website Tracking	12,613 page views, only 2 captured CTAs	-Work with our DevOps team to discover why CTA's are not being tracked properly. -Add tracking to URL to capture leads.
Minitab Exchange Event Website	Inform customers on locations and event agenda to understand what is in it for them	Minitab customers	Goal is to get over 5,000 page views	HubSpot Reporting Metrics	8,512 Page Views	-Valuable webpage which maximized visibility and should be repeated. -Improve page usability with clear sections on the agenda, FAQs, and contact information.



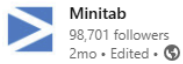
# INTEGRATED MARKETING COMMUNICATION

## AT-EVENT TACTICS

Our at-event promotional strategies included capturing event content for social media and providing attendees with branded visuals to reinforce the event's identity. However, the primary focus of the event remained on delivering impactful presentations, which were central to the overall attendee experience.

### LINKEDIN

For our on-site event promotions, we shared photos and videos of live event moments on our LinkedIn account, posting multiple times each event day to boost visibility and engagement. In the morning, we shared a setup post to build excitement, followed by a midday post showcasing a customer speaker in action, which helped boost engagement as their network might recognize and engage with the post. We adopted this strategy after the first two events, so it wasn't fully standardized across the program. Posts featuring guest speakers consistently achieved the highest engagement. Please refer to Appendix I to see our at-show LinkedIn schedule.



#MinitabExchange in Columbus today! 📍

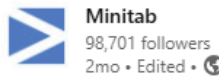
We can't wait to spend the rest of the day exchanging insights and knowledge with our customers.

Can't make it to Columbus? Find a Minitab Exchange near you: <<<https://lnkd.in/d/ZC87xs>>>

#CustomerEvent #Networking #DataAnalytics #Columbus



At-Event LinkedIn Post Example



Live action at #MinitabExchange Columbus! 📍

**Scott Sterbenz** from Ford Motor Company presents the power of multiple linear regression for problem-solving.

Interested in attending? Find a Minitab Exchange near you: <http://4wr2.com/floGewT>

#Minitab #MultipleLinearRegression #DataAnalytics #Columbus



At-Event LinkedIn Post Example



# INTEGRATED MARKETING COMMUNICATION

## AT-EVENT TACTICS

### EVENT BRANDED ITEM GIVEAWAY

At each event, we implemented branded product giveaways, including hats, YETI mugs, and T-shirts featuring either our company logo or event branding.

#### **6008R 10 Steps to a Great Corporate Event ELC#9:**

**Everyone is a VIP** explains the importance of making your guests feel welcome through convenience, incentives, and thoughtfulness. The giveaways we provided served both as a gesture of appreciation to attendees and as an incentive



Examples of Branded Items

for completing event surveys. This approach proved effective, as guests were motivated to complete surveys for a chance to win. Initially, winners were drawn from the full-sized surveys, but this was cumbersome. For the final two events, we switched to a raffle ticket system. Attendees received a raffle ticket in exchange for their completed survey, simplifying the winner selection process. At our last event, we experimented with distributing prizes before lunch, which added excitement and kept attendees engaged throughout the day.

### ONSITE TESTIMONIALS

To gather on-site testimonials for future event promotions, we brought our content team to two events to capture attendee feedback. However, they encountered challenges in identifying attendees willing to provide testimonials and in securing company permissions to share job titles and company details. Despite these obstacles, they were able to capture a few testimonials, including one from a guest speaker.

We also collaborated with an agency for one event, which resulted in 10 testimonials. Their success was attributed to a confident and proactive approach, which allowed them to engage more attendees effectively. At this event, we also secured testimonials from two guest speakers, which will be valuable for future promotions.



Onsite Customer Testimonial

### BOOK GIVEAWAY



Quentin Brook Book

We partnered with author Quentin Brook, whose book, *Lean Six Sigma and Minitab: The Complete Toolbox Guide for Business Improvement*, provides a practical and approachable guide to Lean Six Sigma, complete with detailed Minitab instructions and helpful screenshots. As part of this partnership, we offered copies of the book to the first 25 attendees at three events, promoting the giveaway in pre-event emails to encourage early arrivals and boost attendance.

# INTEGRATED MARKETING COMMUNICATION

## AT-EVENT INTEGRATED MARKETING COMMUNICATIONS

COMMUNICATION METHOD	RATIONALE	TARGET AUDIENCE	MEASURABLE GOAL	ASSESSMENT METHOD	RESULTS	RECOMMENDATIONS
LinkedIn Posts	Highlight our Guest Speakers to customers to create awareness and stimulate interest	LinkedIn users who are Minitab customers Guest Speaker network	Goal is to achieve a higher-than-average engagement level of 3.8%	LinkedIn Performance Report	10.70% average at-event engagement	-Increase our promotion of guest speakers before, during and after event to capitalize on their network to increase engagement. -Ask guest speakers to repost our posts.
Event branded item giveaway	Brand Visibility, Guest Appreciation for Attending, Way to Get Completed Surveys	Event Attendees and Their Colleagues Who See Promotional Items	Goal is to give 10 away per event	Report on how many	Gave out 10 branded items per event	-The giveaway items were successful in thanking our guests for attending, sharing our brand logo, and getting completed surveys. -Add different prizes, give away prizes throughout the day, and use raffle tickets from which to pick winners.
Onsite testimonials	Wide reach to customers to create awareness and stimulate interest	LinkedIn Users, Minitab Customers	Goal is to conduct 10 testimonials across program	Report on how many	Conducted 10 testimonials	-Train our content team to be prepared to capture testimonials onsite. -Ensure our content team is onsite at all events to capture testimonials for promotions.
Book Giveaway	Promotes Minitab as a Thought Leader and Trusted Advisor, Guest Appreciation for Attending, and Incentive to Arrive Early	Event Attendees	Goal is to give away 25 books to the first 25 guests who arrive	Based on attendance	Gave out 25 books at 2 Events	-This was a successful partnership and should continue with updated editions of the book for all events next year. -Giving out to first 25 people did not impact arrival times. -We should plan to give the book out to everyone as some people were upset that they did not get one.



# INTEGRATED MARKETING COMMUNICATION

## POST-EVENT TACTICS

Our post-event promotional strategies included posting content that was captured at the events on LinkedIn, providing attendees with the presentations, and direct follow up communications from sales and customer success.

### LINKEDIN

We intended to share a post-event LinkedIn update following each event, but we only achieved this for three out of six events. A post-event LinkedIn post from our Rosemont event garnered exceptionally high engagement and click-through rates due to its inclusion of multiple images that encouraged viewers to interact by clicking through. To replicate this success, we should incorporate multiple pictures into each post in the future, as this approach can effectively boost engagement and click-through rates. Please refer to Appendix J to see our post-show LinkedIn schedule.

### POST-EVENT WEBSITE

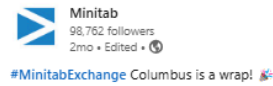
To ensure all attendees could access the presentations shared during the event, we developed a post-event website where they could view not only their event presentations but also those from all other events this year. This password-protected website was shared by the customer success manager, who acted as the MC for the event. The site served as an effective way for attendees to reconnect with the content presented, keeping it top of mind for any questions or further inquiries.

### SALES REPRESENTATIVE FOLLOW UP

Sales representatives provided direct email follow-ups after each event to allow attendees to ask questions or express additional interest. However, this communication was not tracked in 2024, highlighting the need for a tracking system to ensure each attendee is individually reached out to by a sales team member.

### CUSTOMER SUCCESS TRAINING FOLLOW UP

Our customer success team provided a valuable giveaway of free training opportunities, which typically incur a cost. The follow-up for this initiative involved the customer success team reaching out to training winners to help them schedule their sessions, ensuring they receive these educational benefits and reinforcing our commitment to customer support.



Thank you to our customers and friends for joining us yesterday. We had a great time exchanging insightful conversations and feedback.

Interested in attending? Find a Minitab Exchange near you:  
<<[https://lnkd.in/dM5E\\_izT](https://lnkd.in/dM5E_izT)>>

#Minitab #CustomerEvent #Networking #Columbus



Post-Event LinkedIn Post Example



# INTEGRATED MARKETING COMMUNICATION

## POST-EVENT INTEGRATED MARKETING COMMUNICATIONS

COMMUNICATION METHOD	RATIONALE	TARGET AUDIENCE	MEASURABLE GOAL	ASSESSMENT METHOD	RESULTS	RECOMMENDATIONS
LinkedIn Posts	Wide reach to customers to create awareness and stimulate interest	LinkedIn users who are Minitab customers	Goal is to achieve a higher-than-average engagement level of 3.8%	LinkedIn performance report	10.27% average post event engagement rate	-Continue to highlight the event after it is over and should capture more photos and post more during the event to increase engagement for after event posts. -Include tracking URL with CTA to Event Page to promote future events and capture leads.
Post Event Website	Provide attendees with the Presentation Slides	Event attendees	Goal is to have 30% views on page from attendance	Landing Page Metrics	99 page views, 48% of total attendance	-The post event page worked well to share presentation slides with attendees, and we should continue to share in the future. -Implement sending a marketing thank you email with a link to the page as well as training our sales team to individually reach out to those who attended. -Add CTAs to the post event page on upcoming webinars or other events to stimulate further interest in our marketing activities.
Direct emails from reps	Provide attendees with the opportunity to ask any further questions or follow up on additional interest	Event attendees	Goal is that all attendees are individually reached out to by a sales member	Report on how many	Did not track	-Did not track this in 2024 and need to incorporate better tracking and follow up in the future. -Send a marketing thank you email and not solely rely on sales follow up.
Customer Success Training Follow Up	Provide training winners with follow-up on scheduling their training sessions to ensure that they are provided with their educational opportunities	Event attendees who won free training	Goal is to have scheduled training for all winners	Report on how many	Have 5 training opportunities created out of the 26 awarded	-Free training awards should continue. -Incorporate better tracking and follow up for the future to ensure that award winners utilize this opportunity.



# CRITERIA #6

## MANAGEMENT OF RESULTS REPORTING



# MANAGEMENT OF RESULTS REPORTING

## MEASURING THE RESULTS

In total, we had 209 Minitab Customers attend the Minitab Exchange event program in 2024. We averaged 35 people in attendance per event, which was a 36% average attendance rate. Please see the registration and attendance numbers from our events below.

OVERALL ATTENDANCE REPORT			
	Registration	Attendees	Attendance Rate
Atlanta	57	20	35%
Philadelphia	84	35	42%
Rosemont	130	57	44%
Columbus	96	39	41%
Dallas	103	32	31%
Anaheim	117	26	22%
<b>Totals:</b>	<b>587</b>	<b>209</b>	<b>36%</b>

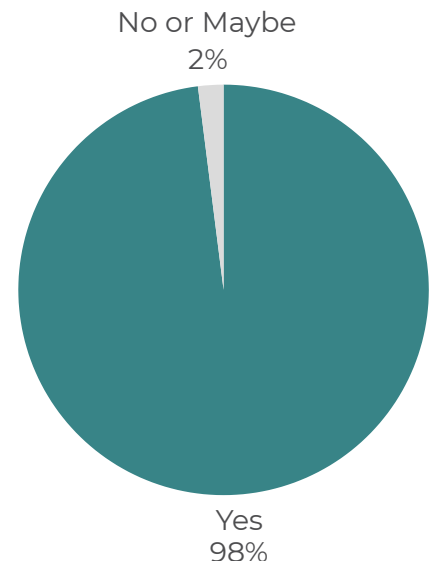
## SURVEY RESULTS

A key assessment measure for our event program were our survey results. We achieved an 83% response rate from the total surveys distributed during our program. Of those who responded, 98% indicated they would attend the event again. Email proved to be the most effective communication channel, with 55% of respondents stating it was how they learned about the event. The majority attended hearing from our industry experts, and the session most valuable to our attendees was the "Best Practices" session. In contrast, the "Interactive Workshop" was the least valuable.

Overall, attendees were satisfied with key elements of the event, including the quality and number of sessions, the event date, and the venue. Additionally, 86% of participants said they were very likely or extremely likely to recommend the event to a colleague. Notably, 57 respondents expressed interest in having a representative reach out to them.

In terms of feedback for improvement, attendees suggested more time for networking, increased opportunities to engage with our staff, more use cases and hands-on training within the content agenda, real-time examples, and the possibility of breakout groups or parallel sessions to cover more specific, in-depth topics.

### WOULD YOU ATTEND THIS EVENT AGAIN?



# MANAGEMENT OF RESULTS REPORTING

## Results of 2024 Minitab Exchange Overall Strategies and Measurable Goals

STRATEGY	TACTIC	ASSESSMENT METHOD	MEASURABLE GOAL	RESULTS	RECOMMENDATIONS
Increase Event Attendance	Select 6 locations with strongest customer populations	Compare attendance from 2023 to 2024	Goal is to increase average attendance 150%	Average attendance increased 161% from 2023 (21.5 to 34.8 attendees/event)	<ul style="list-style-type: none"> <li>-This was successful, but venues should not be near airports.</li> <li>-We should work with regional sales to determine better venues within those cities.</li> <li>-If sales want to do an event in a different city, they need to provide a list of key accounts and contacts to get approval.</li> </ul>
	Increase Sales Outreach	Post Event Survey	Goal is to have average of 75% of attendees hear about event from their account manager	15% on average came from sales	<ul style="list-style-type: none"> <li>-Sales should leverage past attendees from 2024 events to send personalized emails.</li> <li>-Provide sales with key talking points like a script to help them communicate with contacts.</li> <li>-Sales should report weekly on their outreach and schedule Solution Center meetings or dinners with key accounts or contacts.</li> </ul>
	Develop and Promote Compelling Agenda	Post Event Survey	Goal is to have average of 90% say they would attend again	98% on average said they would attend again	<ul style="list-style-type: none"> <li>-Ensure the agenda is clearly visible on the event website.</li> <li>-Utilize survey responses to help develop content more relevant to audience needs (case studies, real world examples).</li> <li>-Ensure that guest speakers are properly promoted through multiple channels and posts.</li> </ul>



# MANAGEMENT OF RESULTS REPORTING

## Results of 2024 Minitab Exchange Overall Strategies and Measurable Goals

STRATEGY	TACTIC	ASSESSMENT METHOD	MEASURABLE GOAL	RESULTS	RECOMMENDATIONS
Increase Customer Engagement	Incorporate SLIDO Polling Software	SLIDO Utilization Rate	Goal is to have an average 85% audience utilization rate	84% on average utilization rate	<ul style="list-style-type: none"> <li>-Questions should help guide presenter's focus during sessions to add more value to the attendees.</li> <li>-Utilize the live Question and Answer feature with a Minitab expert.</li> </ul>
	Incorporate Interactive Workshop in Agenda	Collect Attendee Data	Goal is to have average of 90% audience interaction in session	Captured attendee preferences for upcoming features from 100% of guests only at 2 events	<ul style="list-style-type: none"> <li>-Ensure that a notetaker is present at each roundtable to capture important feedback and data at all events.</li> <li>-Update the topic of discussion to something more relevant to audience.</li> </ul>
	Collect Feedback from Post Event Survey	Post Event Survey	Goal is to get a 75% survey response rate	83% average response rate	<ul style="list-style-type: none"> <li>-Utilizing a paper survey instead of digital provided us with a stronger response rate and should be continued.</li> <li>-Continue using the surveys as an exchange for a giveaway entry.</li> <li>-Update the survey to have our event branding on it.</li> </ul>
	Collect Onsite Customer Testimonials	Report on How Many	Goal is to get 10 onsite testimonials	Got 15 onsite testimonials	<ul style="list-style-type: none"> <li>- Train our content team to be prepared to capture testimonials onsite.</li> <li>-Ensure our content team is onsite at all events to capture testimonials for promotions.</li> </ul>
	Invite a Customer Speaker for All 6 Events	Report on How Many	Goal is to have 6 customer speakers	Had 5 speakers, missed one city	<ul style="list-style-type: none"> <li>-Confirm speakers earlier in the planning process.</li> <li>-Vet their presentations ahead of time to approve their presentations.</li> <li>-Increase our promotion of guest speakers before, during and after event to capitalize on their network to increase engagement.</li> </ul>
	Provide Free Training to Event Attendees at Each Event	Report on How Many	Goal is to give out 5 free training courses per event, 30 total	Gave out 26 total	<ul style="list-style-type: none"> <li>-This worked well, as the amount given was based on attendance and therefore the lesser amount was not seen as a failure.</li> <li>-Incorporate better tracking and follow up for the future to ensure that award winners utilize this opportunity.</li> </ul>



# MANAGEMENT OF RESULTS REPORTING

## Results of 2024 Minitab Exchange Overall Strategies and Measurable Goals

STRATEGY	TACTIC	ASSESSMENT METHOD	MEASURABLE GOAL	RESULTS	RECOMMENDATIONS
Increase Sales Pipeline	Add Solution Center	Report on How Many	Goal is to have 15 conversations at Solution Center at each event	Average of 10 conversations per event but hard to track	<ul style="list-style-type: none"> <li>-Train sales to walk customers over to Solution Center and to schedule meetings ahead of time.</li> <li>-Set up breaks and breakfast next to the Solution Center stations to entice guests to network and engage at stations.</li> </ul>
	Incorporate Session in Agenda on New Product Highlights	Post Event Survey	Goal is to have average of 20% of attendees indicate new product interest	78% on average had interest in new products	<ul style="list-style-type: none"> <li>-Ensure lead collection service is provided at every event to better capture new product interest.</li> <li>-Continue to incorporate new product session dedicated to unveiling new products.</li> <li>-Continue to provide Solution Center station with experts to get more information on new products.</li> </ul>
	Capture Customer Follow Up Inquiries	Post Event Survey	Goal is to have average of 20% of attendees to ask to follow up with rep	31% on average wanted a sales rep to reach out to them	<ul style="list-style-type: none"> <li>-Assign specific sales members to handle post-event inquiries and ask them to track their communications.</li> <li>-Add contact form to post event website to collect inquiries.</li> <li>-Communicate to attendees at end of event where they can direct any inquiries post event.</li> </ul>
	Upsell and Cross Sell Products	Sales Opportunities Dashboard	Earn \$500K in Sales Opportunities	Earned \$1.6 Million Sales Opportunities	<ul style="list-style-type: none"> <li>-Ensure product demos and presentations highlight how products work together.</li> <li>-Showcase case studies or guest speakers where customers found success in combining our products.</li> <li>-Analyze the opportunities from events again in 6 months due to long purchase cycle.</li> </ul>



# MANAGEMENT OF RESULTS REPORTING

## Results of 2024 Minitab Exchange Overall Strategies and Measurable Goals

STRATEGY	TACTIC	ASSESSMENT METHOD	MEASURABLE GOAL	RESULTS	RECOMMENDATIONS
Increase Exchange Event Brand Awareness	Garner a good impression of event on attendees	Post Event Survey	Goal is to have average of 90% of attendees say that they would recommend event to a friend	88% on average would recommend event to a friend	<ul style="list-style-type: none"> <li>-Ensure first impressions are positive, with smooth check-in and supportive information on the logistics for the event.</li> <li>-Analyze feedback from surveys on suggestions for improving future events.</li> </ul>
	Improve Targeted LinkedIn Promotions	Engagement Rate	Goal is to have an average 3.5% engagement rate on LinkedIn or higher	5.72% average LinkedIn engagement and 4.70% click through rate, 523,924 overall impressions	<ul style="list-style-type: none"> <li>-Devise more strategic, standardized campaign strategy for future with consistent posting on multiple platforms.</li> <li>-Ensure that we promote the entire event program as well as each individual region.</li> <li>-Ensure that we capitalize on at-event and live action content as it had the highest engagement rates.</li> </ul>
	Develop and Promote Event Website	Landing Page Metrics	Goal is to have over 5,000 website views	8,512 Page Views	<ul style="list-style-type: none"> <li>-Valuable webpage which maximized visibility and should be repeated.</li> <li>-Improve page usability with clear sections on the agenda, FAQs, and contact information.</li> <li>-Ensure all links to event website have tracking URLs.</li> </ul>



# MANAGEMENT OF RESULTS REPORTING

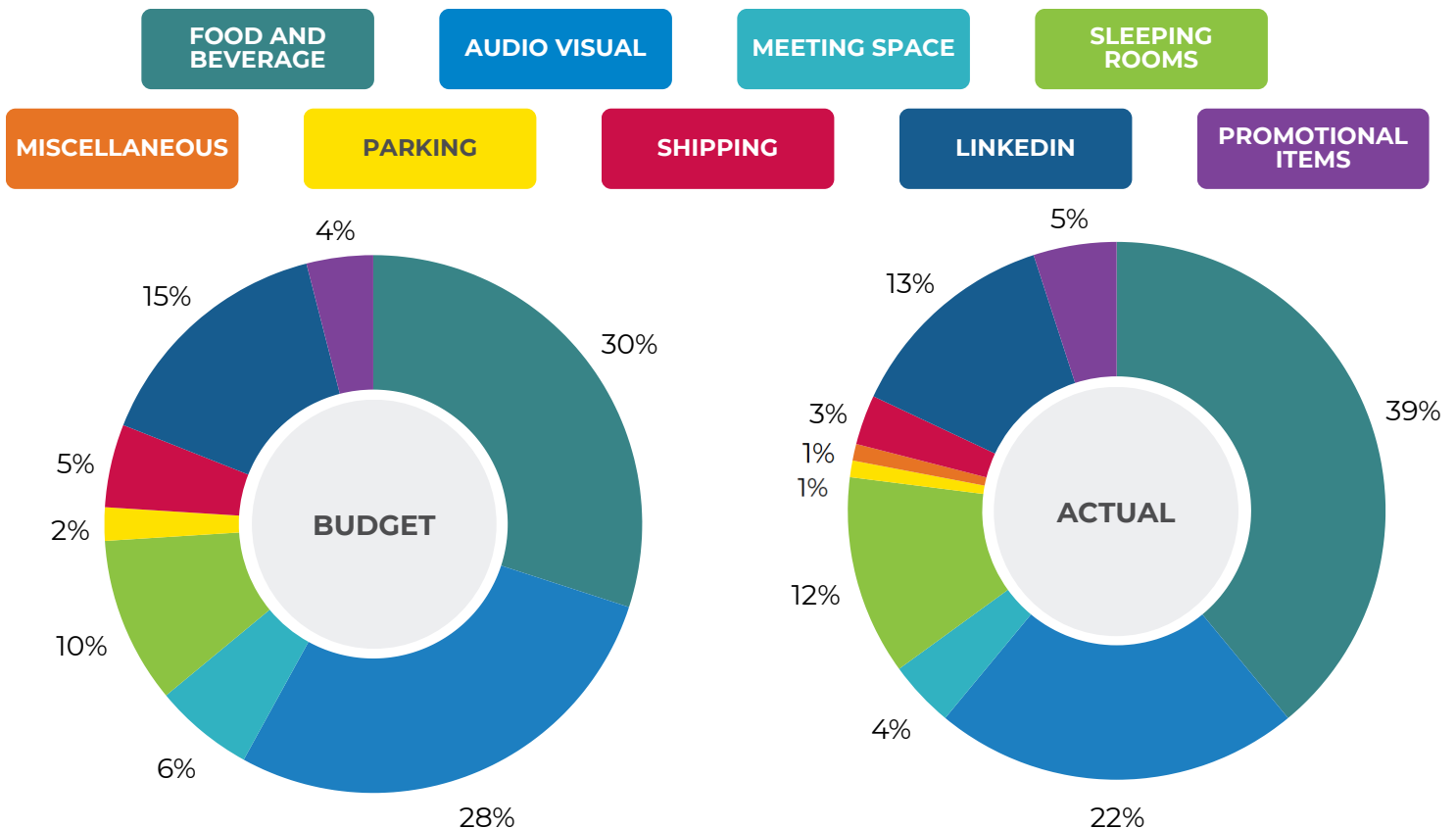
## POST SHOW ANALYSIS REPORT

Following each event, we held a debrief meeting with our team to review what went well and identify areas for improvement. The survey results were presented during these post-event meetings to inform our discussions.

During our post-show meetings, we gathered valuable feedback from our on-site staff, which we used to refine and enhance future events throughout the program. These debrief sessions were important in assessing the team's perspective on the event's overall success, identifying what went well, and highlighting areas for improvement. Overall, the feedback was overwhelmingly positive, with the team consistently noting that the content was engaging and relevant for our customers, and that the event management ran smoothly. Constructive feedback provided opportunities for us to make targeted updates.

A final Stakeholder Debrief meeting was scheduled with the Senior Director of Global Customer Success, Customer Success Manager, and Manager of Global Events. Our Manager of Global Events shared the results with the Chief Marketing Officer following our meeting. In this meeting we reviewed our strategies and objectives, evaluating how effectively we met or missed those goals. Additionally, we consolidated all survey analytics into a single report for a thorough assessment.

## BUDGET RESULTS



## MANAGEMENT OF RESULTS REPORTING

After analyzing our budget versus actual spending, it is evident that we exceeded our initial estimates in areas such as food and beverage, sleeping rooms, and promotional items. The increase in food and beverage costs was driven by the higher-than-expected registration numbers throughout the program. Although we initially budgeted for 50 attendees, some events saw registration numbers higher than 100, which required us to adjust the food and beverage counts to accommodate both guests and staff.

The rise in sleeping room expenses was similar due to an increase in staff attendance. We initially estimated 10 sleeping rooms per event, but with more team members attending, we needed to book additional rooms for most of the events this year.

On the other hand, we spent less than anticipated on LinkedIn promotions, audio visual services, and shipping. The underspend on LinkedIn was a result of the final event concluding before we had fully utilized the allocated budget for that event. Audiovisual costs were lower due to a discount we received at the Columbus event following an equipment malfunction, which led to a refund. Shipping expenses also came in under budget as we were able to drive our items to Philadelphia and Columbus ourselves.

Overall, our estimations were close to the actual expenditures for this year's program. These insights will serve as valuable reference points for forecasting and refining our budget for the 2025 event program.

In total, we went over budget by \$10,301.76. Our final event of the year, held at the Hilton Anaheim, which is connected to the Anaheim Convention Center and located across the street from Disneyland, significantly contributed to this overage. This venue was substantially more expensive than all other locations, and being at the end of the year, we did not anticipate how these increased costs would impact on our overall budget. For example, the audio visual services at the Hilton Anaheim were double the cost of all other audio visual services at our other Minitab Exchange events. One way to mitigate this cost in the future is to ensure that we receive an audio visual spec sheet ahead of time to understand the costs up front to allow us to accurately budget the cost into our plan.



# CRITERIA #7

# CONCLUSION



## FINAL ASSESSMENT

The 2024 Minitab Exchange event program was a success, and we achieved most of our strategies and objectives. We saw a 161% increase in attendance, growing from an average of 21.5 attendees to 34.8 per event from 2023 to 2024. Additionally, we crafted a more compelling agenda, with 98% of survey respondents stating they would attend the event again.

Our enhanced marketing efforts, including targeted emails and higher-than-average engagement rates on LinkedIn, resulted in thousands of impressions. We also achieved over 8,000 page views on our event website, boosting both event attendance and brand awareness. The introduction of the Solution Center to our event design fostered increased engagement and networking with our customers, with an average of 31% of survey respondents requesting follow-up with sales representatives.

Additionally, we collected 15 on-site testimonials from customers and featured five guest speakers at our events. We provided free training opportunities to 26 companies and received survey feedback from 83% of attendees. These achievements significantly increased customer engagement and contributed to the overall success of the program.

Despite exceeding our budget, these events contributed to sales opportunities valued at \$1.6 million. The return generated from the events far outweighs the additional costs, making the investment well worth the outcome.

## RECOMMENDATIONS FOR IMPROVEMENT

Although the event program was a success overall, there are several areas we can improve upon for future years. One of our goals was to increase sales outreach, aiming for 75% of attendees to hear about the event from their account manager. However, only 15% of attendees, on average, came from sales. To address this, we need to enhance sales outreach, hold the sales team more accountable, and ensure they understand the direct benefits of their involvement.

Our SLIDO polling software had an 84% utilization rate, just below our 85% goal. We could improve by crafting more engaging poll questions tailored to our audience and using their responses to shape more relevant sessions for each event.

We also aimed at 90% of attendees participating in our interactive workshop session, but this data was only effectively captured during the final two events when we implemented note-takers for the interactive discussions. This method should have been implemented from the start to track engagement and gather valuable insights for our research and design teams. While we planned to have a guest speaker at each event, we only secured speakers for five out of six events, missing one due to a last-minute cancellation. To avoid this in the future, we need to confirm speakers earlier. Better speaker program management, including ongoing communication and support, will also help ensure a smooth process.



## MANAGEMENT OF RESULTS REPORTING

We had a goal of achieving 15 conversations at the Solution Center per event, but tracking this was difficult due to the collaborative nature of the discussions. To improve, we should train sales representatives to guide customers to the Solution Center and schedule key account meetings ahead of time to ensure meaningful demos. Additionally, implementing paper lead forms at the beginning of the year, rather than the final event, will help capture more leads.

While we aimed at 90% of attendees saying that they would recommend the event to a friend in our survey responses, we achieved 88% on average. To further improve, we should carefully review feedback from surveys and incorporate their suggestions into future content agendas. Lastly, we found that airport hotels lacked the facilities, equipment, and service to handle our events and did not provide the best experience for our attendees. In the future, we should work with the sales team in each region to select venues that are not only logistically convenient but also align with the preferences and needs of our customers.

### CERTIFIED TRADE SHOW MARKETER (CTSM) EXPERIENCE

The content presented to me throughout my CTSM certification process has been immensely beneficial for my growth and development within this industry. I am grateful for the support of Minitab, which has not only enabled me to obtain my Certified Trade Show Marketer certification but has also provided opportunities for me to enhance my personal and professional skill set.

Having access to sessions specifically designed for trade show and event planners has given me a strong foundation to build upon for the continuation of my career. Learning these essential skills early in my professional journey has been instrumental to my success. The 2024 Minitab Exchange event program allowed me to put my learnings into action, further underscoring the value of the program. I feel confident and equipped to execute successful trade shows and events in the future.



# CRITERIA #8

# REFERENCES



## CTSM REQUIRED SESSIONS

1008R How to Measure the Value of Trade Show Participation Part 1 .....	Page 24, 27, 31, 32
1009R How to Measure the Value of Trade Show Participation Part 2 .....	Page 25
2003R The Nuts and Bolts of Budgeting for Results .....	Page 28
2072R How To Train Booth Staff .....	Page 17
3011R How to Grow Your Brand .....	Page 14, 17, 21
3015R Integrated Marketing Communications .....	Page 32, 33
3022R No Exhibit Is An Island .....	Page 15
3048R Sales and Marketing Alignment .....	Page 15, 17
4007R Exhibit Law Primer .....	Page 20
6008R 10 Steps to a Great Corporate Event .....	Page 19
6010R Basics of Event Planning .....	Page 19, 25
6011R The Basics of Event Logistics and Implementation Part 2 .....	Page 26, 27
6020R The @Show Experience .....	Page 22

## CTSM ELECTIVE SESSIONS

1014 You Know What to Measure – But How Do You Actually Measure It .....	Page 26
2008 Ten Strategies to Generate More Top-Quality Booth Traffic .....	Page 31
3029 Build a Successful Event Marketing Plan .....	Page 15



# CRITERIA #9

# APPENDIX



## APPENDIX A

### RFP

Guest Room Requirements					
Day	Any (Run of House)	Single (1 Bed)	Double (2 Beds)	Suite	Staff
Wed, Oct 9, 2024	10				
<b>Check-In Date</b>	Wed, Oct 9, 2024		<b>Total Room Nights</b>	10	
<b>Budgeted Room Rate</b>	USD \$170		<b>Peak Room Nights</b>	10	
<b>Additional Information</b>	Sleeping rooms are not required if the venue is not a hotel.				
Meeting Room Requirements					
<b>Start Date</b>	Thu, Oct 10, 2024				
Day	Time	Agenda Item	Meeting Room Requested		
Thu, Oct 10, 2024	8:00 AM-6:00 PM	<b>Presentation Meeting</b> Notes or Exceptions: Room for 50 seating in rounds of 6-8. Additional space for demo area (solutions center) or the use of a connecting room for this space. 1,000 sq. ft. total (both presentation and solution center space).	Rounds (Meeting Room Required) 1,000 Sq. Ft. / 50 people		
Thu, Oct 10, 2024	8:00 AM-6:00 PM	<b>Solution Center Breakout Session</b> Notes or Exceptions: This room will function as a 'Solution Center' or 'Innovation Lab,' featuring 5-6 stations equipped with monitors and computers for demonstrating our software solutions. It can be connected to the presentation room or combined into one large space.	1,000 Sq. Ft. / 50 people		
<b>AV Requirements</b>	High-speed Internet will be required. A projector, microphones, and podium will be required.				



## APPENDIX A

### RFP

Organization Information			
Organization Name	Minitab LLC		
Organization Type	Corporate	Industry	Software and Internet
Address	1829 Pine Hall Road Minitab State College, PA 16801 USA		
Employees	301 - 500	Average Attendees per Event	1 - 50
Events per Year	20	Average Room Nights per Event	1 - 50
Single-Day Events	70%	Total Attendees per Year	101 - 150
Multi-Day Events	30%	Total Room Nights per Year	1 - 50
Organization Information	<p>Minitab is the leading provider of software and services for data analytics, quality improvement and statistics education. Minitab® Statistical Software, Minitab Connect®, SPM®, Minitab Workspace®, Minitab Engage®, Minitab Model Ops®, Real-Time SPC®, and Minitab Education Hub®, provide a complete data analytics solution. For 50 years, thousands of distinguished organizations in over 100 countries have turned to Minitab for tools that help their business initiatives yield bottom-line benefits. More than 90% of Fortune 100 companies use Minitab Statistical Software.</p> <p>Companies that trust Minitab for quality include American Express, Microsoft, Nike, General Electric, Ford Motor, Crayola, and The Hershey Company.</p> <p>Minitab employs over 350+ individuals and is headquartered in State College, PA with offices in Chicago, IL, the United Kingdom, Paris, Australia, Netherlands, Hong Kong, and Germany. Companies that trust Minitab for quality include American Express, Microsoft, Nike, General Electric, Ford Motor, Crayola, and The Hershey Company.</p> <p>Minitab employs over 350+ individuals and is headquartered in State College, PA with offices in Chicago, IL, the United Kingdom, Paris, Australia, Netherlands, Hong Kong, and Germany.</p>		

Event Information			
Event Name	Minitab Exchange Anaheim		
Total Attendees	50		
Event Type	Corporate Event	Total Meeting Space Required	1,000 sq. ft.(100 sq. m)
		Largest Meeting Room Required	< 1,000 sq. ft.(<100 sq. m)



## APPENDIX A

### RFP

<b>Commission</b>	No		
<b>Event History</b>	The planner has indicated that this event has been held before.		
<b>Dates Flexible</b>	Yes		
<b>Event Dates</b>	Thu, Oct 10, 2024 - Thu, Oct 10, 2024 + 1 alternate dates		
<b>Date Type</b>	<b>Event Date Options</b>	<b>Notes</b>	
Planner Preferred	Thu, Oct 10, 2024		
Alternate Date	Thu, Oct 17, 2024		
<b>Business Objectives</b>	Our goal is to bring together quality and continuous improvement professionals to share best practices in business processes, continuous improvement, predictive analytics, machine learning and using data to identify and solve the most complex problems. Minitab Employees provide educational content that will empower organizations and attendees network with their peers. This event also allows Minitab to strengthen existing relationships and meet with prospective new customers who are looking to enhance their data analysis programs.		
<b>Destinations Under Consideration</b>	Orange County, CA		

### View Event History

This event has been held in the following locations:

Venue Name	City	State	Date	Attendees	Room Block	Room Pick-Up	Food and Beverage Spend
Truist Park Konica Minolta Conference Center	Atlanta	Georgia	11/30/2022	50			\$4,750.00
Hilton Minneapolis	Minneapolis	Minnesota	10/9/2023	70			\$7,766.45
<i>F&amp;B Total was combined with Meeting Space Rental Total</i>							
NASCAR Hall of Fame	Charlotte	North Carolina	9/13/2023	50			\$11,444.06



**APPENDIX B****FORCE MAJEURE CLAUSE**

Neither party shall be liable for any failure to perform its obligations under this Agreement where such failure is due to circumstances or events not reasonably in the control of that party, including but not limited to acts of God, fire, flood, unreasonable extreme inclement weather, natural disaster, war or threat of war, acts or threats of terrorism, civil disorder, unauthorized strikes, governmental regulation or advisory, recognized health threats as determined by the World Health Organization, the Centers for Disease Control (USA), or local government authority or health agencies (including but not limited to the health threats of COVID-19, H1N1, or similar infectious diseases), curtailment of transportation facilities, or the occurrence of other similar or dissimilar events (each, a “Force Majeure Event”), where such Force Majeure Event (or the escalation thereof) prevents, dissuades, or results in the closure or repurposing of the Hotel by the Government of (COUNTRY WHERE EVENT IS BEING HELD) or where a Force Majeure Event makes it illegal, impossible, inadvisable, or commercially impracticable to hold the Event or to fully perform the terms of the Agreement.

Upon the occurrence of a Force Majeure Event (i) either party may terminate this Agreement and cancel the Event by providing written notice to the other party, without liability, damages, fees, or penalty, and any unused deposits or amounts paid shall be refunded; (ii) the parties may mutually agree to move the Event to a new location that can accommodate the Event notwithstanding the occurrence of the Force Majeure Event; or (iii) the parties may agree to delay the Event to a date and time mutually agreed upon when the Force Majeure Event has ended.



## APPENDIX C

### ASANA TO DO LIST

#### ▼ 10 Weeks: Event Generation

- ✓ Confirm Location, Date, and Duration
- ✓ Determine Minitab Onsite Team Members
- ✓ Determine Minitab Speakers and Topics
- ✓ Determine Customer Speakers and Topics
- ✓ RPF to Venue Options

Add task...

#### ▼ 9 Weeks: Finalize Venue and Prepare Marketi...

- ✓ Pick Venue
- ✓ Finalize Contract with Venue
- ✓ Begin LP and Cvent Pages
- ✓ One-on-one Invite Email Template for Sales
- ✓ Marketing Emails
- ✓ Marketing Materials - Banners, PPTs, etc.
- ✓ Create Registration Dashboard

#### 8 Weeks: Go LIVE

- ✓ Finalize Agenda/Presentations from Speakers
- ✓ Finalize Marketing Graphics
- ✓ Launch HS Promo Page
- ✓ Launch Cvent Registration Page
- ✓ Send Promo Page and Email Template to Sales
- ✓ Add Website to Events Page on www
- ✓ Secure Hotel Room Block for Onsite Team and External Spea

#### 7 Weeks

- ✓ Determine Solution Center Equipment Needs
- ✓ Food & Beverage
- ✓ Audio Visual
- ✓ Determine Promotional Items
- ✓ Coordinate Shipping

#### 2 Weeks

- ✓ Prepare Event Agendas
- ✓ Update Venue on Allergies/Restrictions/Special Needs
- ✓ Create Post Event Survey

Add task...

#### 1 Week

- ✓ Print and Prepare Name Badges
- ✓ Print Delegate List Per Sales Person for Team
- ✓ Print Survey Copies
- ✓ Create Attendance Sheet
- ✓ Print Agendas
- ✓ Social Posts

Add task...

#### During Event

- ✓ Social Posts

#### After Event

- ✓ Social Posts
- ✓ Thank You Email
- ✓ Survey Result Analysis
- ✓ Event Report Meeting Debrief
- ✓ All Invoices Sent to Team



## APPENDIX D

### RUN OF SHOW



TIME	ACTION	SESSION
7:30 -8:30 AM	-Lavalier mics on Celine and Josh -Get Caitlin and Mark handheld mics	SETUP
8:30 AM – 8:45 AM	Celine speaks with lavalier	Welcome
8:45 AM – 9:30 AM	Josh speaks with lavalier	What’s New With Minitab
9:30 AM – 10:30 AM	Mark speaks with handheld	Speaker Spotlight
10:30 AM	-Lavalier mic removed from Josh -Lavalier mic on Dennis	Networking Break
11:00 – 12:00	Dennis speaks	Best Practices in MSS
12:00 – 12:45	-Lavalier mic removed from Dennis -Lavalier mic on Jim -Get Jack handheld	Lunch
12:45 – 1:45	Jack speaks with handheld	Interactive Workshop
1:45 – 2:45	Jim speaks with lav	Solution Spotlight
2:45 – 3:00	Celine speaks with lav	Closing



APPENDIX E

SURVEY

Minitab Exchange Anaheim 2024

1. Would you attend this event again in the future?

Yes

No

2. How did you hear about this event?

Email

Social Media

Minitab Representative

Minitab News

Colleague

Other (please specify)

3. What influenced you to attend this event?

Learn more about Minitab Solutions

Hear from industry experts on how they use data analysis to solve problems

Provide feedback to Minitab on how I use their solutions

Network with others

Provide feedback to Minitab on what I would like to see in their solutions

Other (please specify)

4. The content shared will help me be more successful in the future.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
What's New With Minitab	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker Spotlight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Best Practices in Minitab Statistical Software	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interactive Workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Solution Spotlight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



APPENDIX E

SURVEY

5. Please indicate your level of satisfaction with the following aspects of the event.

	Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
Venue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speakers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of Sessions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of Sessions Offered	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Date of Event	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. What topics would you want to see more of at future Exchange events?

7. What products would you be interested in learning more about?

- Minitab Statistical Software
- Minitab Engage
- Minitab Connect
- Minitab Workspace
- Minitab Model Ops
- Real-Time SPC
- Minitab Education Hub
- Predictive Analytics

8. How likely are you to recommend this event to a colleague?

- Will not recommend
- Not likely
- Somewhat likely
- Very likely
- Extremely likely

9. What would have made this event better? Please provide any additional feedback.

10. Would you be interested in having a Minitab representative contact you?

- Yes
- No

11. Name and Company



## APPENDIX F

## LINKEDIN PRE-EVENT MARKETING COMMUNICATION SCHEDULE

LINKEDIN POSTS PRE EVENT				
Event	# of Posts	# of Impressions	Avg. Engagement	Avg. CTR
All Events	3	52960	2.86%	2.38%
Atlanta	3	6885	2.40%	1.48%
Philadelphia	3	6681	3.88%	2.36%
Rosemont	3	5676	2.87%	1.75%
Columbus	7	14553	3.14%	2.09%
Dallas	4	7207	4.54%	3.67%
Anaheim	3	4258	2.97%	1.22%

## APPENDIX G

## INSTAGRAM PRE-EVENT MARKETING COMMUNICATION SCHEDULE

INSTAGRAM PRE-EVENT POSTS					
Rosemont	Views	Reach	Impressions	Engagement	Date
Exchange Tour Reel	68,000	62,000	68,000	207	9-Jul
Exchange Customer Reel	789	524	600	38	12-Aug
Columbus	Views	Reach	Impressions	Engagement	Date
Exchange Post	194,000	141,000	191,000	406	21-Aug
<b>TOTALS</b>	<b>262,789</b>	<b>203,524</b>	<b>259,600</b>	<b>651</b>	

## APPENDIX H

## EMAIL PRE-EVENT MARKETING COMMUNICATION SCHEDULE

EMAILS PRE-EVENT					
Event	# of Emails	Unique Opens	Open Rate	Click Through Rate	Unique Clicks
All Events	3	1887	36.79%	4.77%	165
Atlanta	7	1233	29.66%	13.89%	102
Philadelphia	9	2487	21.94%	6.75%	145
Rosemont	9	3901	35.64%	6.85%	252
Columbus	6	1604	35.20%	2.12%	102
Dallas	11	2728	26.33%	6.63%	157
Anaheim	10	2321	25.64%	6.01%	150



## APPENDIX I

## LINKEDIN AT-EVENT MARKETING COMMUNICATION SCHEDULE

LINKEDIN POSTS AT-EVENT				
Event	# of Posts	# of Impressions	Avg. Engagement	Avg. CTR
Atlanta	0	0	0.00%	0.00%
Philadelphia	1	5896	12.57%	10.92%
Rosemont	2	6667	16.65%	15.21%
Columbus	2	115801	6.64%	5.66%
Dallas	2	103343	4.97%	4.74%
Anaheim	2	5276	12.67%	12.36%

## APPENDIX J

## LINKEDIN POST-EVENT MARKETING COMMUNICATION SCHEDULE

LINKEDIN POSTS POST-EVENT				
Event	# of Posts	# of Impressions	Avg. Engagement	Avg. CTR
Atlanta	0	0	0.00%	0.00%
Philadelphia	0	0	0.00%	0.00%
Rosemont	1	3913	22.39%	20.90%
Columbus	1	124339	2.97%	2.92%
Dallas	1	80050	5.44%	5.32%
Anaheim	0	0	0.00%	0.00%

