

## ***Map the Metrics: Engagement and Events Workbook***

### ***Healthcare Businesswomen's Association***

**Purpose:** To assess past performance, interpret member engagement data, and build a strategic roadmap toward quality, revenue-generating events rooted in real data. To foster intentionality in event planning and execution. To create a high-quality, high-impact attendee experience.

#### **SECTION 1: Current Landscape**

Use **My reports** to find this information.

1. Total Events Hosted: \_\_\_\_\_
2. Break down by type: \_\_\_\_\_
  - a. Networking: \_\_\_\_\_
  - b. Recruitment: \_\_\_\_\_
  - c. Educational: \_\_\_\_\_
3. Total Revenue (sales, other income): \$\_\_\_\_\_
4. Average Event Satisfaction Score (out of 5 [Calculating an Average Event Satisfaction Score \(Out of 5\).docx](#)): \_\_\_\_\_
5. Attendance Breakdown:
  - a. Total Registered Attendees (cumulative): \_\_\_\_\_
  - b. Actual Attendees (cumulative): \_\_\_\_\_
  - c. Total Registered Members in Your Region: \_\_\_\_\_

#### **SECTION 2: Data-Informed Reflection**

Use the data above + post-event reporting to answer the following:

1. Which event type(s) had the highest turnout or satisfaction? Why?  
(Short reflection)

2. Which events took the most effort and yielded the lowest return?

*(ROI = Return on Time, Energy, or Money)*

3. Based on your total member count and attendance data:

a. Total Members in Region: \_\_\_\_\_

b. Average Member Attendance per Event: \_\_\_\_\_

4. What's the engagement gap? Why do you think it exists?

*(Reflection + Examples: Marketing strategy, lack of relevance, poor timing?)*

5. What strategies could close that gap?

*(Examples: Use social media more strategically, tap into HBA Community, member-focused outreach, additional lead time)*

6. Have you primarily focused on recruitment events? What has the return been?

*(Optional reflection – shift from quantity to strategic intent)*

SECTION 3: Sponsorship & Partnership Review (Please meet with your corporate relations lead)

1. List your sponsors + the value of their contributions

a. Sponsor Name

b. Type (Monetary / In-Kind)

c. Value

d. Relationship Status (New / Ongoing)

2. Reflection prompts:

a. Are you cultivating new sponsorships?

b. Are you utilizing attendance and satisfaction data to create compelling event summaries and sponsorship pitches?

## SECTION 4: Strategic Shifts for Q3–Q4, and beyond (Next year’s plan)

1. List two changes you’ll implement based on your findings:

- a.
- b.

2. What does a “quality event” look like for your team? Define it.

*(Ex: High satisfaction score, engagement in chat, member-led content, sponsorship viability, etc.)*

3. What one event or initiative will be your team’s high-impact focus for the rest of the year?

*(Name / Type / Intended Impact)*

4. What kind of support do you need from HBA Central or your Chapter board to be more successful? *(Could be tools, training, clarity, accountability, visibility, etc.)*

## SECTION 5: Planning & Event Approval

Access the [2025 Master Events List-Master List](#) *Note: All upcoming events must appear on your events list plan to be considered for approval.*

Plans must be updated quarterly.

1. Using your data and strategic shifts, plan out your next 3–6 months of events. Include: Tentative titles, goals, format (virtual/in-person), target audience, sponsors, event lead, etc. Be realistic. Prioritize quality and capacity.

2. Access the [2026 Master Events List](#). Start to add in the basic framework for types of events you and your team plan to hold throughout the year. Include: Tentative titles (educational event #1 is ok), general timeframes, estimated attendance numbers, pricing, and potential sponsorships. Again, please make your plan attainable and remember this plan can be altered throughout the year.

## SECTION 6: Planning Meeting Agenda

Use this during your board or committee meeting.

Time: 90 minutes

1. Welcome & YTD Highlights (10 min)
2. Review Event Metrics & Reflection Guide Together (30 min)
3. Breakout: Brainstorming Strategic Shifts (20 min)
4. Events List Planning Session (20 min)
5. Support Needs + Next Steps (10 min)

## SECTION 7: Using & Interpreting Your Data

*Numbers tell a story—but only if we ask the right questions.*

Quantitative Data = Numbers.

- a. Ex: Event satisfaction score, of attendees, revenue

Questions to ask:

- b. What trends do we see?
- c. What improved or dropped off?
- d. What patterns emerge around timing, topics, speakers?

Qualitative Data = Impressions/Experiences.

- a. Ex: Survey comments, anecdotal feedback, team reflections

Questions to ask:

- b. What did people say they liked or didn't?
- c. Was there excitement in the room/chat?
- d. Did attendees stay engaged?

How to bridge the two:

- a. A 4.8/5 satisfaction score + low attendance = great event, poor outreach
- b. 80 attendees + low survey feedback = high turnout, low engagement.
- c. Multiple 3.5 scores = a theme that needs solving.