



Measuring Your Impact: **The Playbook**

A step-by-step workbook for virtual event organizers

This playbook gives you a repeatable system for measuring, understanding, and acting on your virtual event data. Work through each step before, during, and after your event.

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Step 1 • Before Your Event

Set Your Goals First



Measurement without a goal is just a spreadsheet. Before you do anything, answer these three questions. Everything else flows from here.

1. What are you trying to achieve with this event?
2. Who is your audience and what do they need?
3. What decision will you make with this data?

Common event goals

- Generate qualified leads
- Prove ROI to leadership or sponsors
- Drive product adoption or trial
- Build brand awareness in a new market
- Educate and retain existing customers
- Strong attendance and engagement

Industry benchmarks to know

Use these as a starting point; your benchmarks will shift as you build your own event history.

Metric	Industry average	Strong Performance
Registration to attendance rate	40-50%	60%+
Avg. session watch rate	50-65%	75%+
Survey completion rate	15-25%	40%+
Sponsor booth visit rate	20-30% of attendees	40%+
On-demand view rate	30-40% of registrants	50%+

Volume or conversion: which are you solving for?

Most teams focus on getting more registration, but the real lever is improving conversion. A 10% lift in attendance rate can outperform hundreds of additional registrants. Know which you're solving before you build anything.

Volume goals

Growing reach and pipeline by scaling attendance.

Goal: get people in the door.

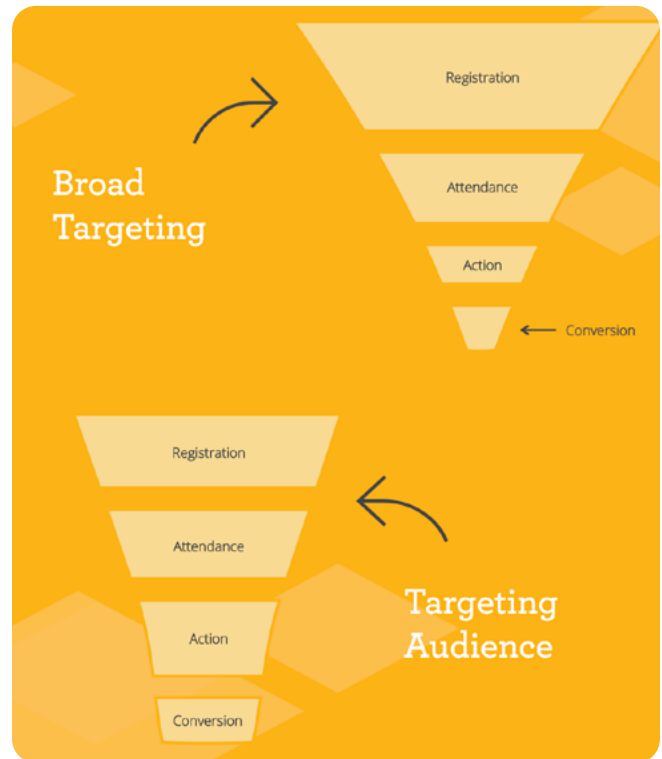
Here, the focus is on registration, attendance numbers, and first-party data. Metrics live in pre-event efforts like registration source, page conversion, and email performance.

Conversion goals

Improving efficiency by moving people through the funnel.

Goal: get more value out of the people already there.

With conversion, the focus is on how many registrants became attendees, how many became qualified leads, and how engagement translates to pipeline.





Your Turn: Define your goals

My primary event goals are:

I will consider this event a success if:

The one decision I need data to make after this event:

Who needs to see the results (stakeholders):



Step 2 · Before Your Event

Know What to Measure



Not all metrics are equal, and the right ones depend on your goals. Use this framework to map your goal to the metrics that will actually help judge your event impact.

If your goal is...	Measure this metric	What it tells you
Generate leads	Registration to attendance rate, session clicks, CTA interactions (tip- use dynamic banners for CTAs to best track click rates), registration source	Who showed intent, when, and where they came from
Prove sponsor ROI	Booth visits, booth engagement by user including hand out views and reps chatted with, session attendance for sponsored content, sponsored content added to the event briefcase	What exposure and engagement each sponsor received
Drive engagement	Chat messages, poll responses, Q&A submissions, avg. session watch time, business cards sent, number of handouts viewed, survey responses, gamification or user journey participation	Whether attendees were active participants or passive viewers
Improve future events	Drop-off points, session watch rate, top/bottom sessions by time spent, number of help desk messages sent, which sessions/ handouts were most popular to track hot content, survey responses	Where you lost people and what kept them
Understand your audience	Demographics, content clicks, topic engagement, repeat attendance, top time spent by space, top tracks or handouts	Who your audience really is (vs. who you think they are)



Your Turn: Write the top 5 metrics you want to track

Remember, your data will be most helpful when it's targeted to your goals and refined enough to reveal a data story.

Your goal:

Metric to track:

What it tells you:

Metric to track:

What it tells you:

Metric to track:

What it tells you:

Metric to track:

What it tells you:

Metric to track:

What it tells you:

Step 3 • Before Your Event

Build with Intent



Every decision you make about your event — what content to include, how to structure it, where sponsors live, what engagement features you turn on — is an opportunity to support the goals you set in Step 1 or drift away from them.

If your goal is...	Actions you can take...	
Generate leads	<ul style="list-style-type: none">● Plan how to score leads by engagement depth before handing to sales.● Create exciting pre-event emails highlighting content or the agenda to improve attendance conversion.	<ul style="list-style-type: none">● Add “contact us” call to actions in booths or in the event navigation● Build opt-in or qualifying questions to event registration● Create a low friction registration process
Prove sponsor ROI	<ul style="list-style-type: none">● Build custom sponsor report templates for each sponsorship type and configure the data portal, so sponsors have access to their data in real time.● Share best practices with your sponsors before the event if they plan to be there engaging with attendees.	<ul style="list-style-type: none">● Plan to send announcements, marquee messages, or have banners driving attendees to their content.
Drive engagement	<ul style="list-style-type: none">● Plan engagement into your agenda.● Pre-event communities, networking sessions, gamification, and a live team ready to stoke conversation all make the difference between an audience that watches and one that participates.● Incentivize event engagement through gamification, user journeys, or rewards/ giveaways.	<ul style="list-style-type: none">● If your event includes webcasts, consider the format. Breakout sessions are great for engaged or invested audiences where Q+A may be a better engagement option for larger groups with more passive viewers.

If your goal is...	Actions you can take...
Understand your audience	<ul style="list-style-type: none">● Before the event, take what you know about your audience and have that inform your content strategy. What are hot topics would they find interesting? Do they prefer PDF handouts, quick videos, or long group sessions?● Add a variety of content types and tracks. Utilize “content categories” and “tracks” for easy data tracking on what was most popular.

Tip: Don't wait for your audience to break the ice.

Have a team member drop the first question in chat or Q&A, once one person engages, others follow. Lowering the barrier to engagement and building a sense of belonging and community will naturally improve engagement.

Event Design

Virtual environments can be confusing for new users- keep signage clear, content grouped and easy to access and add clear call to actions on signage.

Tip: On-demand is a second event window

Plan a re-engagement email to non-attended registrants the day after your live event. A direct link back in, what they missed, and when access closes consistently improves on-demand view rates — and gives you cleaner data on total content reach.

Sponsors

Booth traffic doesn't happen by accident in the virtual realm; every attendee who visits a booth got there because something directed them. Your sponsorship traffic plan is the product you're selling your sponsors. With the right prep, sponsors will generate better data, stronger leads, and will be easier to renew.



Your Turn: Plan how you'll support your goals through your event build

Sessions and tracks map to audience interest data or goals

- **My content is organized by (list track or category names):**

On-demand period planned and communicated to attendees

- **My on-demand strategy is:**

Engagement features added to the event

- **Feature 1:** _____ **Event Goal it's Tied to:** _____

- **Feature 2:** _____ **Event Goal it's Tied to:** _____

- **Feature 3:** _____ **Event Goal it's Tied to:** _____

Live team briefed on chat moderation, announcements, and real-time response

Schedule marquee messages and announcements before the event begins to guide attendees

- Look at your metric goals and consider how you can boost numbers. Aiming for high session attendance? Try a 5 minute and 1 minute announcement reminder for each session. Encourage attendees use to Chati's agenda builder feature for automatic reminders.

Booth traffic plan in place

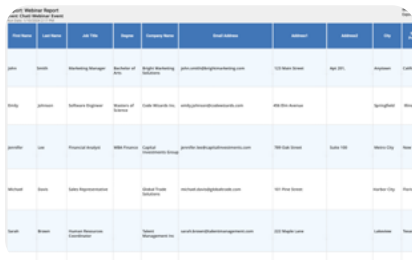
Q&A or polls in sponsored sessions, event activities in sponsored booths, or gamification tasks driving sponsor engagement

Sponsor briefing sent with engagement best practices

Step 4 • Before & During Your Event

Assemble Your Reporting Stack

Chati gives you multiple tools to collect and understand your event data. Set these up before the event goes live so you can hit the ground running with seeing and understanding your data.

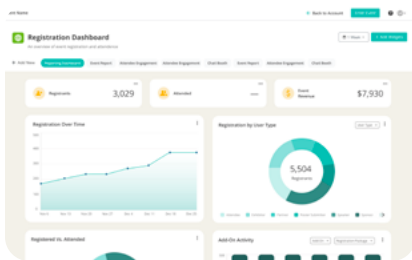


Name	Category	File Type	Owner	Report Name	Event Address	Version	Created	By
John	Sales	Marketing Manager	John	2025 Reporting Metrics	john.smith@labroots.com	1.0	2025-01-01	John
Ming	Finance	Business Engineer	Ming	2025 Reporting Metrics	ming.wong@labroots.com	1.0	2025-01-01	Ming
Jennifer	HR	Human Resources	Jennifer	2025 Reporting Metrics	jennifer.smith@labroots.com	1.0	2025-01-01	Jennifer
Michael	Sales	Sales Representative	Michael	2025 Reporting Metrics	michael.smith@labroots.com	1.0	2025-01-01	Michael
David	Sales	Sales Representative	David	2025 Reporting Metrics	david.smith@labroots.com	1.0	2025-01-01	David

Report Builder

Create tailored reports based on your specific metrics and attendee segments.

Best for: Detailed post-event stakeholder reports; lead lists for sales; metric summaries; detailed engagement and attendee information



Dashboard Builder

Visual, real-time analytics dashboards you can monitor during the event.

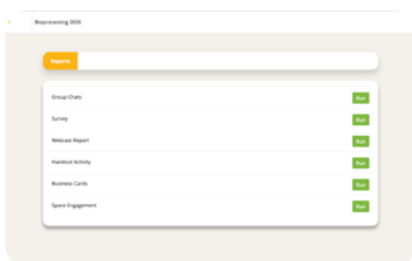
Best for: Live event monitoring, creating high level data stories, and graphic views of event data



Google Tag Manager

Tag-based tracking on event registration and login pages.

Best for: Tracking marketing efficacy if you already use GTM



Data Portal

A separate hub for storing, sharing, and accessing reports.

Best for: Giving sponsors, stakeholders, or attendees self-serve access to their data. Always current, no back-and-forth required.

Live Event Monitoring

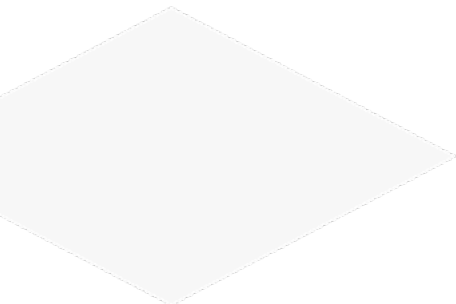
Your dashboard is live and reports are built, now someone on your team needs to actually be watching. Real-time data is only valuable if there's a person ready to act on what they see. Your live team's job isn't just to monitor, it's to respond.

Watch these in real-time

- **Active attendees:** is attendance dropping unexpectedly mid-session?
- **Chat & Q&A volume:** dead silence is a signal as much as high volume
- **Poll responses:** who's engaging vs. just watching
- **Booth visits:** are sponsors getting traffic during breaks?
- **Help desk messages:** are there friction points affecting the experience?

Actions you can take live

- Prompt engagement if chat is quiet ("Drop your biggest takeaway below")
- Send an announcement or marquee message if sponsor booth traffic is low
- Flag high-intent attendees (booth + content + networking) for same-day follow-up
- Send a reminder email to non-attended registrants while the event is still live
- Investigate help desk spikes immediately: address friction before it spreads

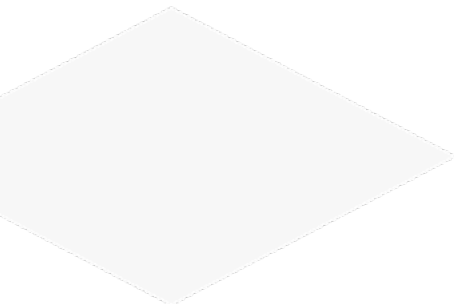




Your Turn: Assemble your reporting stack

- Dashboards built and tested with your key metrics visible
- Report builder configured for post-event stakeholder reporting
- Sponsor report templates built and ready (filter per sponsor before running)
- Data Portal set up with correct reports assigned to correct users and access dates configured
- Baseline set: what does "good" look like for your event size and audience?

- Person assigned to monitor live dashboard: _____
- High-intent attendee flag process confirmed with team



Step 5 · After Your Event

Analyze & Act



Your reports are built and the data is waiting. The work now isn't just pulling numbers together; it's knowing what story they tell and who needs to hear it.

Three reporting checkpoints

Don't close the loop when the stream ends. Your reporting window has layers, and your audience journey doesn't stop when the live event does.

Immediately Post-Live

capture the full live picture.

30 Days Out

see how interest is converting to pipeline and follow-up actions.

End of On-Demand Period

your complete dataset.

Start with the full picture

Before you build any stakeholder report, take a pass through the data as a team. This is where the story forms — and it's easier to find once you know what to look for.

If your goal was generating leads

In Step 3 you planned how to score leads by engagement depth. You've already shared the high-intent list right after the live event, and now you have the complete picture. ***What was your conversion rate from registrant to attendee to qualified lead?***

Share the final scored list with sales, then look beyond it: content engagement and demographics can tell your marketing team something useful about audience preferences and profiles for future targeting.

Regardless of your primary goal...

Step back and read the high-level story before you go deeper. What did attendees engage with, and what did they skip? Was participation active or passive? Where did the energy show up in the data, and where was it flat?

Closing the loop: from data to proof

Go back to your goals. Did you hit your registration to attendance rate? How did sponsored sessions perform against the benchmark you set? What was your avg. session watch rate compared to last time?

Content performance

Find your top performers by watch rate, time spent, and handout views

High-performing content isn't just what got the most registrations — it's what kept people longest, generated the most questions, and got replayed. On-demand replay data tells you what people wanted but couldn't catch live.

Find your lowest performers and ask the harder question

Was it the topic, the time slot, the format, or the length? Look at drop-off timing to find the specific moment that didn't land. That answer is your content brief for next time.

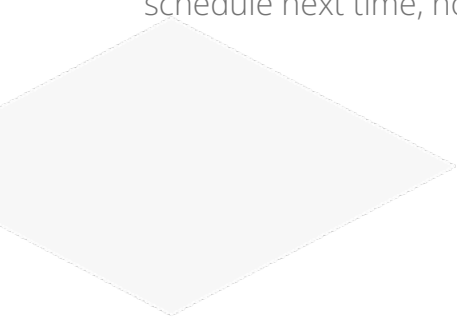
Event structure

Review drop-off timing across all sessions

Look for patterns: are people leaving at 30 minutes? At transitions? After the first keynote? That's your structural signal.

Map session timing against attendance curves

Was the 9am slot under-attended? Did attendance spike in the afternoon? Let data drive your schedule next time, not assumptions.



Engagement Quality

Engagement signal	What it means	Action
High chat volume	Active, connected audience	Replicate the format that drove it
Survey response percentage	Attendees were invested enough to give feedback	Review open-text answers for content and format signals; low response rate = revisit survey placement or length
High Q&A volume	Topic resonated; attendees wanted to go deeper	Create follow-up content or a follow-up session
Avg. session watch rate	The avg. percentage of attendees who watched sessions live or on-demand, shows content interest	Low rate = content/ timing issues; high rate = content that resonated with attendees
Networking participation	How many attendees actively connected with others during the event	Low participation = restructure networking prompts or add facilitated intros; high = lean into community as a retention driver
Gamification / user journey participation rate	Whether attendees followed the experience you designed for them + how engaged they were in the event experience	Low rate = journey may be unclear or too complex; audit the path and simplify the first step

Sponsor ROI

Metrics sponsors care about

- Booth visit count and time spent
- Logo/brand impressions across the event
- Handouts downloaded and content views
- Reps chatted with and leads collected
- Attendance for their sponsored sessions

How to report it

- Use Report Builder to pull sponsor-specific data
 - Create booth activity summary and booth detail reports, add key fields for each like reps chatted with and number of handouts viewed.
- Build a one-page sponsor summary per company
 - Include benchmarks
 - Send within 5 business days of the event

Sharing the Data

Sharing data with leadership

Give them 5 numbers and a trend, not a full recap with granulated data.

What did the event contribute to pipeline? What was the cost per qualified lead? Did attendance grow? Look to answer the questions that matter in that room. Keep it tight and forward-looking.

Sharing data with sponsors

They have the raw data (you set up the data portal in step 4!), now add context.

Find event averages for sponsor performance. The activity tab in Chati will show you high level numbers across the event, making it easy to find and calculate averages.

Add a benchmark line comparing their numbers to your event average, then reach out with a personal overview. Since they already have detailed data in the portal, that added context and high-touch moment turns a data export into a renewal conversation.



Your Turn: Review the Data

Start by looking at registration and attendance.

A 60% registration/attendance rate is usually a strong turnout, but this will vary by event.

Registration:

Attendees:

Reg/Attend %:

Look back at the top 5 metrics you wanted to track in step 2 (pg. 7).

Record the results.



Your Turn: Highs & Lows

Top performing content + why it performed well:

Lowest performing content + likely reason:

Top-performing sponsor (by clicks, views, watch rate, visits, etc.):

Underperforming sponsor + likely reason:

Of your key metrics, did the outcomes exceed or fall short of your expectations?:



Your Turn: Reflect & Act

Did you meet your event goals (as set in step 1)? What would you change or do the same next time?:

What was one topic attendees clearly wanted more of?:

Single most important thing the data told me about my audience:

My three proof points for the next budget or sponsorship conversation: