

ANALYTICAL BRIEF / OCTOBER 2026

After *the applause*

Designing investor events that leave evidence teams can use

For client-event, financial-wellbeing and conference programme leaders

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An investor event can produce a crowded room, positive feedback and a list of contacts without clarifying the audience's decision problem. Those outputs have value, but they do not answer the same question. A useful programme brief specifies what the organiser wants to understand after the room empties.

We propose connecting private participant reflection, a moderated discussion of aggregate themes and an organiser report that states what the evidence can support. The design is a proposal to evaluate. This brief does not claim that a U Impact activation improves financial knowledge, investment participation or lead conversion.

The question for your next programme brief

Which uncertainty should the audience be better able to discuss, and what evidence would show that the event contributed?

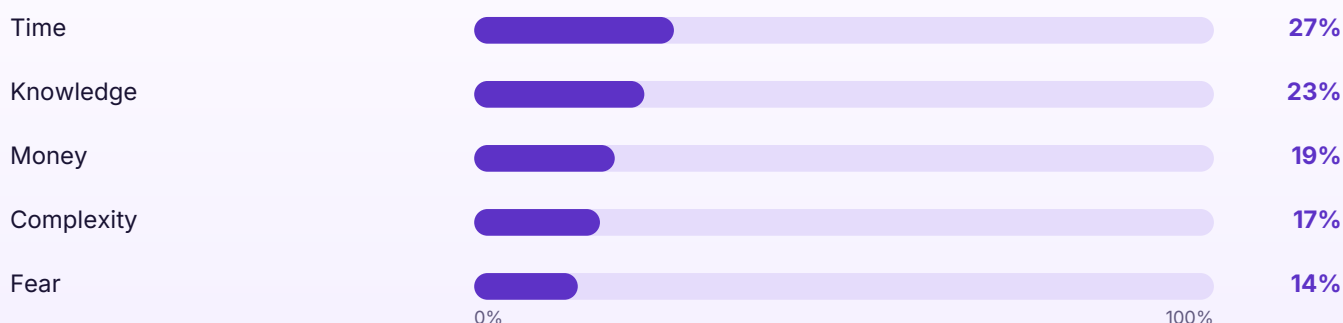
This brief draws on published U Impact event summaries, survey-method guidance and one educational experiment. It is a targeted analytical synthesis, not a systematic review or an effectiveness study. Its practical output is a session design and follow-up protocol that preserve the difference between what respondents said and what an organiser would like to infer.

AUDIENCE EVIDENCE

Ask what the *reported barrier means*

Among participants naming an investment barrier in U Impact's published combined Mirai summary, time was selected by 27%, knowledge by 23%, money by 19%, complexity by 17% and fear by 14%. [1] These are selected answer categories, not diagnoses of why people do or do not invest.

Reported barrier among participants naming a barrier



Base: respondents naming a barrier, including those not reporting feeling stuck. Rounded percentages. Source: U Impact, Let the audience shape the agenda, published Mirai summary. [1]

The overall figure can hide a different audience need

Money was selected by 19% of all respondents naming a barrier, but by 30% of those who both felt stuck and named a barrier. [1,2] These are different groups. Neither figure measures income or capacity for loss. Ask what 'money' means before offering another investment explainer.

What cannot be inferred

Counts, unanswered-question totals, fieldwork dates, exact questionnaire wording and an analysis extract were unavailable for this brief. Small differences between categories should not be treated as an established ranking. The next event may attract a different audience.

Based on responses from real participants at live events run by U Impact in cooperation with NTT DATA. Respondents are not established as a representative investor sample. The safe use of these patterns is to prepare questions for a room, then examine that room's own answers. [3]

EVALUATION

Four outcomes that should *stay separate*

Outcome	A defensible measure	What this cannot establish
Participation	Invited, attended and completed counts; show nonresponse.	People who answered represent everyone who attended.
Experience	Feedback on relevance and usability, with the question and response rate.	A highly rated session improved understanding.
Understanding	Comparable concept questions scored with a fixed key.	People feeling more informed learned more.
Follow-through	A defined follow-up question or observed action in a group that consented to follow-up.	Later action was caused by the event.

Feeling you learned less can coexist with learning more

Deslauriers and colleagues randomised students between active and passive instruction in introductory university physics. Students in the active condition learned more while reporting a lower feeling of learning. [4] The result concerns a controlled classroom comparison, not financial-services events. Its relevance here is the measurement warning: perceived learning and measured learning can diverge.

A post-event satisfaction question is therefore insufficient evidence for a learning claim. Conversely, a participant finding a session difficult is not automatically evidence of poor learning. Keep both signals, and investigate their relationship in the audience and format you actually use.

A before/after knowledge check is useful for exploration, but practice effects, selective completion and other exposures can explain a change. Where an effectiveness claim matters, pre-specify a comparable control condition and assignment strategy. If that is impractical, report the design as observational and avoid attributing change to the event.

One commercial boundary

Download requests and consent to further contact belong in the campaign measurement. They are not measures of understanding, and participation in an assessment should not silently subscribe someone to marketing.

THE ORGANISER BRIEF

Plan around *a specific learning goal*

Illustrative brief: a client audience wants to compare sustainable-investment claims but is unsure what evidence to ask for. The session should help attendees articulate a claim, identify supporting evidence and name the uncertainty that remains. It should not pressure participants into a product decision.

Stage	Agree in the brief
Before the event	Define audience, learning question, recruitment and assessment wording. Decide which data is necessary and who can access it.
Private reflection	Explain the purpose, voluntary participation, uses and retention. Give individual feedback privately.
Aggregate discussion	Share only safe aggregate themes. Combine or suppress small groups and identifying combinations; omit revealing free text.
Moderation	Ask speakers to work through a concrete claim and its limits. Leave space for disagreement and unresolved questions.
Organiser report	Record invited/attended/responded counts, denominators, question wording, themes and competing explanations.
Follow-up	Name an owner, review date and next question. Use separately consented contact details for any marketing follow-up.

Apply a documented disclosure rule rather than improvising on stage. No single minimum group size guarantees anonymity: rare combinations and quotations can identify people even in a larger room. Review the actual data and audience context before sharing. Aggregate does not automatically mean anonymous.

Example organiser report: participants selected 'complexity' (observation); claims may be hard to compare (interpretation); examine that explanation in interviews (next investigation). Retain a competing explanation, such as distrust. Name the owner and evidence that would change the next brief. Enjoyment can justify repeating a format; a learning claim requires its own evidence.

A discussion starter

If participants loved the event but their understanding did not improve, what would you change in the next brief?

SOURCES AND LIMITS

What the event evidence *can support*

The descriptive event patterns suggest questions, not general prevalence or causal explanations. The classroom experiment supports a measurement distinction, not evidence that investor events have the same effect. The proposed session and readout have not been validated here. Sources were selected for relevance; this is not a systematic review or an independently peer-reviewed paper.

References

- [1] U Impact (2026). Let the audience shape the agenda. Published combined Mirai barrier summary.
- [2] U Impact (2026). When the barrier is money. Denominator-specific event insight.
- [3] AAPOR (2013). Report of the Task Force on Non-Probability Sampling.
- [4] Deslauriers, L., McCarty, L. S., Miller, K., Callaghan, K., & Kestin, G. (2019). Measuring actual learning versus feeling of learning in response to being actively engaged in the classroom. PNAS, 116(39), 19251-19257. DOI: 10.1073/pnas.1821936116.

Joint authors and disclosure

Dr Clemens Chaskel - platform and applied research.

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All three authors are U Impact co-founders with a commercial interest in the services discussed. U Impact is backed by SDG Investments. Partner attribution identifies the event cooperation; it does not imply external peer review or endorsement of this brief.

Planning your next investor event?

Email us your audience, event format and the question you want attendees to understand. Let's discuss an assessment, moderated conversation and organiser report for your programme.

Email the U Impact team

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Or use our contact form

Publisher / Impressum: impact4good GmbH (U Impact). Registered office: Berlin.

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Commercial register: Amtsgericht Charlottenburg, Berlin; HRB 229776 B.

VAT identification number / USt-IdNr.: DE344333428.

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