Getting to know the role of CRM within the events business

by **eventscase**

Introduction

Spreadsheets have always been fundamental when it comes to organising and managing the endless tasks and information that go into hosting an event.

The transfer of this information from offline, paper-based documents to the computer and realms of programmes like Excel might have represented a huge positive at the time. Yet, the industry must think bigger if it is to embrace a more effective way of managing its conferences and exhibitions.

As ubiquitous as physical spreadsheets are in the event world, digital-based CRM (customer relationship management) has become virtually indispensable for businesses of varying backgrounds.

The term refers to a range of technologies and strategies that helps people manage and analyse the data that passes through their companies. It condenses all the interrelationships between a business (the event organiser) and customer (attendee) in a single database. Sales, services and marketing can all benefit from the view that CRM provides, given they all have a basic need for information around the end user.

To see how this works for an event, consider the use of a CRM tool for instantly viewing the status of a prospective attendee - assessing if they've registered for a pass or failed to check out - as an alternative to spending valuable time in the mailbox trying to find the same information.

While some of the industry's stalwarts have their own tried-and-tested formulas for keeping everything on track, these processes are becoming increasingly obsolete within companies that need to organise more events with less budget and fewer workers. If organisers want to increase the pace at which they can perform and complete certain tasks, there needs to be a technological intervention - one that can certainly be led by CRM.

In this resource, we will be going through the uses of CRM within an events business, complete with practical advice on its integration. Our objective is to demonstrate how, through new solutions and approaches, an event manager can do the same job in a better, more efficient way.

Advantages of using a CRM within events

Recent estimates from Gartner regarding the market value of CRM tools almost spell out just how popular they have become. Revenue from companies selling these technologies hit $39.5 billion in 2017, making CRM the largest software market in the world, and this will only rise thanks to the 16% growth forecasted in 2018.

You don't need to have any interest in software or technology to recognise that, at face value, CRM is incredibly popular around the world, but you have the right to ask why. Here are some of the benefits in a generic business context:

- Time is saved by centralising huge banks of customer data.
- CRM provides more accountability as information is easier to find (and harder to lose).
- Data can be a business-wide consideration due to ease of access.
- Communications can be automated, rather than manually managed.
- Data creates a better understanding of customers.

The final point is arguably the biggest here. By using data that is both accessible and actionable, anyone can learn more about the people they sell to and find out ways of meeting their every need. Through this, we are talking about the easiest route to more sales and satisfaction.

Events businesses are well equipped for the onset of CRM. For one, they collect lots of data from attendees, including contact details, registration statuses and any travel or food requirements. That data is positioned deep within the realms of a mailbox or spreadsheet unless it is centralised via CRM.

Secondly, events businesses are busy places to work; there is always a demand for tools that can maintain the relationship between attendees while a number of other tasks are taken care of.

The leading CRM solutions will allow someone to collect a list of visitor records, complete with registration forms, through the same web page that each person heads to for information about the event. That data is then ready to be used for all manner of purposes, like communicating with the individual or in any situation where the organiser needs to check certain facts.

Let's look at the direct benefits of using CRM over a spreadsheet for exactly the same tasks:

A saving of time

The information of the attendee is automatically recorded via a website or app, preventing manual exports of data. The centralising of information also reduces the time it takes to find certain records when they are needed.

Greater chances of monetisation

For those wondering how to get sponsors for an event, look no further than CRM. Each attendee can be upsold on exhibition stands and sponsorship packages by team members in sales and marketing. All they need is access to the system.

Ease of access

Data can be accessed, configured and changed easily, regardless of the controller at the other end. CRM empowers every member of staff to use data in doing a better job.

Improved service

Many CRM platforms are integrated with things like the 'contact us' button on a website because people want to act on these questions as soon as possible. From here, you can categorise each query according to its level of priority and work through the responses.

Better accountability

A centralised database reduces the risk of losing information from corrupted files or lost documents.
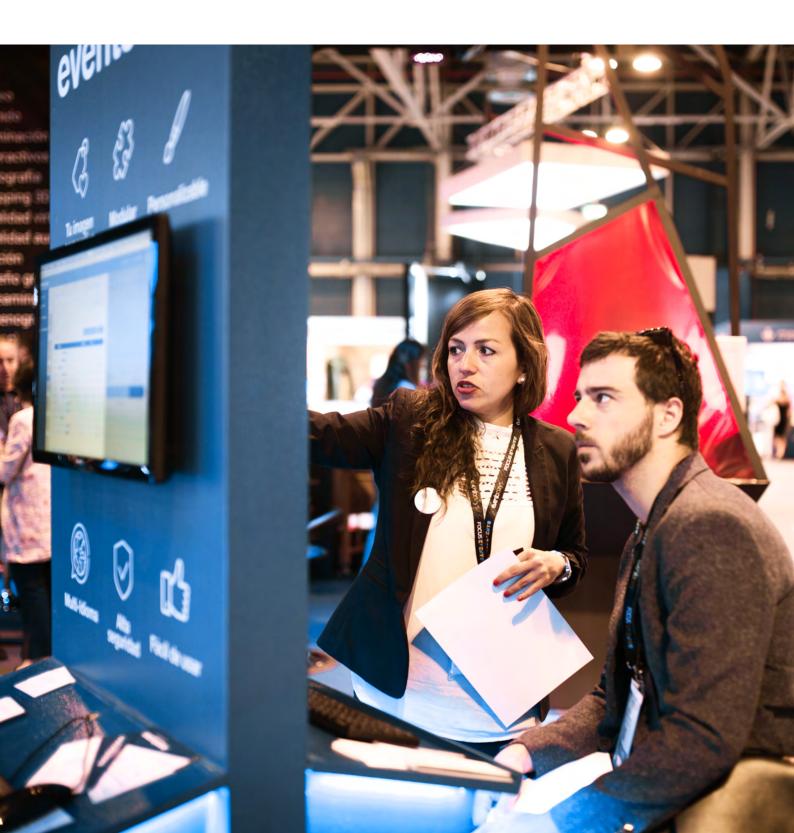
The modern touch

Practices like automated communications (facilitated via CRM) are a hallmark of a cutting-edge business. If you're an events agency relying on spreadsheets to organise information, can you afford the unwanted reputation of being behind the times?

It's true that CRM represents an investment of sorts, but a significant saving is made by increasing the speed it takes for paid staff to perform certain tasks. According to a UK-based survey from Total Jobs, one in every four employees believes they are unproductive at work, with this costing each employer an average of £4,467 per employee every year. Clamping down on time-consuming processes is one way this can be reduced.

Furthermore, CRM offers increased monetisation opportunities and better levels of service, both of which can feed into even greater earnings for the business at hand.

An investment of time is also required to ensure that the tool can be operated by the relevant team members. However, once the necessary training has been conducted, there are only gains to be made from this point onwards.

The next level - integrating registration software with CRM

One of the biggest advantages of CRM is its ability to centralise a lot of disparate information around a business. It does this by integrating with other sources of data, like a website, an email account or a social media platform. The idea is to use the same insights these channels produce but in a better way.

In the case of events, a key point of integration is with an event management platform - the same one that handles the registration process - which creates a natural gathering point for information around attendees and their requirements.

When someone signs up to attend an event, their data can be fed into the CRM where it is categorised and stored for later use. That enables you to set up specific campaigns which show you how many attendees you have, the passes they've bought, and what type of businesses they represent. All of this data is the launchpad for countless opportunities.

With a view to seeing how companies utilise the integration between their event management platform and CRM, here are eight known uses:

Close the loop:
Most CRM platforms can be integrated with event management tools. Consider the use of Salesforce or HubSpot for passing data from the event management platform to sales and marketing. It then becomes easy for an organiser to prove the value of their events and customers to the bottom line.

Paper reduction:
By having an end-to-end solution that saves information to the cloud, you can synchronise data from other solutions such as the agenda, app and on-site registration. That eradicates the need for physical copies of the same information and will drastically cut down on your use of paper.

Duplications disappear:
There is no lost, forgotten or deleted data in a CRM. If you try to create the same customer, the system will send you an alert and ask whether you want to go ahead.

Improved access (organiser):
The registration software allows you to control and manage the attendees' information from within the platform itself. Anyone who is in charge of registration can access the data via the technology and later CRM, leading to more clarity on the whole.

Duplications disappear:
There is no lost, forgotten or deleted data in a CRM. If you try to create the same customer, the system will send you an alert and ask whether you want to go ahead.

Reduce requirement for data management:
Once an attendee has registered for an event, their data is logged in the CRM and synchronised in real time. Thus, it does not require a manual update, nor an export or import into a spreadsheet.

Data is actionable in real time:
As well as cutting down the hours spent managing different forms of data, someone can access and act on the information at a faster pace. This is especially useful for sales reps that want to contact leads while they're hot.

The personal touch:
Your CRM can store data for years to come. That means if ever you need to get an idea of someone's history (e.g. if they've attended an event before) you can pick up their story and engage in a more purposeful conversation.

Once you've mastered the integration between CRM and event management platforms, you can move onto thinking about how additional connections can assist in the delivery of your projects. For example, if you have a marketing automation tool, you can funnel data from your event management platform into your CRM and integrate all three components for a better way of communicating with attendees.

This works by using the CRM to create sequences and groups, depending on factors like the ticket choice or type of attendee, and programming your automation platform to send personalised information to attendees in real time (e.g confirmation emails, "thank you" messages) without intervention from events, sales or marketing.

How to connect a CRM to your registration software

Now you're aware of the advantages of CRM and how it can work alongside your existing event management tool, you might be wondering about how things operate on the technical side. Thankfully, the process of getting set up is easier than ever.

The simple answer is that a connection is made through an API, which is short for application programming interface. An API is a code that software developers will openly share in order to have other developers link their products to it. In short, it is a way for one website or app to plug itself into another.

Each CRM platform and event registration system will have different APIs. When they are connected via the internet, they obtain and exchange information about things like attendees and sales. For instance, if a new attendee registers for an event and pays for their tickets, the registration system connects with the CRM to create a new file and will add an invoice to their account.

The connection between a registration software and a CRM has two configurations, depending on the data that you want to share:

Unidirectional:

In the uni-directional setup, the software will request information about how it can establish a connection with the CRM, but you do not need to ask questions yourself. This is the point at which the system connects to the CRM.

All of the information gathered is to help the CRM in establishing its role - like, for example, which new attendees it has to generate an invoice for.

Bidirectional:

The other method is bidirectional, which is a reference to the CRM and event management platform asking questions and answers at the same time.

Typically the registration system will connect to a CRM to add new contact information, but it can be the other way round when the CRM needs to update the records associated with an attendee.

If you already have event registration software, you're halfway towards building a toolset which can aid your business going forward. You can, however, go a step further with CRM integration. These platforms can act as a genuine compliment to your event technology by ensuring that all of the information you have on attendees is up to date, helping to reduce the chances of confusion later down the line.

CRM platforms like HubSpot or Salesforce also help you turn potential leads into attendees by allowing you to act on the data that funnels through the event side of the business. One approach is to segment your data according to their value or the speed at which you need to communicate with them. For instance, after seeing that one attendee has been browsing the exhibition stand page, you can place them into a category for receiving communications around the benefits of sponsoring the event. It's then up to your emailing system or the CRM itself to target them with relevant messages.

Sales representatives will vouch for a good system for managing the data they deal with. A usual strategy is to place leads into certain groups and use the CRM to label each one, namely 'New', 'Converted', 'Qualifying' or 'Rejected'.

Our cycle explains the relationship between CRM and event management in more detail:

- Data is collected through website/app.
- Data is channelled into event management platform.
- Integration with CRM allows data to be segmented.
- Sales and marketing reps see notifications of contacts entering CRM.
- Further integration with emailing system/marketing automation allows sending of relevant messages.
- Results are tracked via CRM.
- Conversion - the desired result is achieved.
- No conversion - the data is re-categorised for later use.

The value of integration is a key thing to remember here. Without a direct connection, it is still possible to run an event management programme alongside a CRM platform and benefit in similar ways. What this fails to provide is a route for the data to travel, leaving those in marketing, sales or events to codify and import each contact when they drop through the system. Given that a lead can turn from hot to cold in a matter of hours, that extra time could prove costly.

Anyone running large-scale conferences should certainly be thinking about the usefulness of integration between their event management platform and CRM. These types of gatherings can generate tens or hundreds of data points in a very short space of time. All it takes is a few days of staff absence or a busy week for the leads to build up inside the event management technology, to the point where it's hard to keep track of what needs to be done.

Overall, there is so much to be said about closing loops, breaking down silos and bringing together all the different teams that help an event run effectively.

In summary

Event organisers have been calling out for help in fulfilling the duties that heap unnecessary weight on their busy schedules. Thankfully, event management platforms are on hand to assist with a range of mundane tasks that would otherwise take up hours of valuable time.

Organisers running a good number of decently sized events will see the benefit in using these solutions to handle the registration process, deliver crucial messages to attendees and centralise information around the agenda. However, there is always the option of taking another step forward to unlock further efficiencies.

A well-rounded CRM tool allows for optimisation across even more stages of an event's lifespan, from the way that team members consult with a system for checking facts, to how they distribute key insights across different departments. By combining its functionality with that of an event management platform, any organiser can build a structure that is advanced, efficient and in-keeping with modern standards.

Nowadays, if someone completes their purchase of a ticket, their information can be stored for later reference and used in future marketing campaigns. Situations change - people can opt in and out of attending - which is why the real-time aspect of both technologies is critical in providing an up-to-date view of proceedings.

The integration between CRM and event management technology gains even more importance when considering the people that don't check out with a ticket or a sponsorship package. Sales teams are measured on their ability to convert leads that pass through a CRM, but what chances are they given if that data comes hours or even days after it's supposed to? Seamless integration between technology makes it easier to carry information from the original source to the CRM and is key to driving more revenue.

On the whole, events are like any other business: they attract customers who need to be understood and satisfied if the relationship is to progress. People come to an event with different aims, different requirements and varying levels of spend. Data can summarise everything the business needs to know about the people that buy from it, which is why it calls for an appropriate method of organisation.

Further reading

http://press.totaljobs.com/release/the-real-cost-of-the-uk-productivity-crisis-4500-lost-on-every-unproductive-worker/

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