

Maximize Your ROI for Meetings and Events with Salesforce

Ten Quick Event Management Tips for [salesforce.com](https://www.salesforce.com)
Customers & Partners



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By Elias Terman

Every event – from partner training sessions and user group meetings to seminars and luncheons – is an opportunity to enhance relationships with existing clients and tap into new lead sources. Salesforce and the AppExchange make it easy to strengthen client relationships with integrated tools for easy event management.

These Top Ten Event Management Tips will help you connect with more clients while making your meeting planning tasks hassle free.

1. Use your Salesforce database to turn EVERY event into a strategic selling tool. If your VP of Sales is traveling to Chicago for a tradeshow, send out a quick “Special Booth Invitation” email to all your Chicago-area prospects and leads.

2. Create a Salesforce Campaign around your event, making each invitee a Campaign Member. Use the special Campaign features to set each invitee’s member status to show where they are in the process— such as invited, coming, declined, confirmed, or attended.

3. Make it easy for your attendees to respond online. The link to RSVP for your event should appear at least two times in your email invitation. Each recipient’s actions should be automatically captured in Salesforce to give immediate results and reduce errors. If possible, the registration web page should be pre-populated with each invitee’s contact information, making registration much faster for the invitee. Use the ‘Events’ section of your website to link to your event registration web pages.

4. Make the most of your brand. Incorporate your logo and company colors into the registration web page. Stay away from services that put advertising on your page. You’d hate to see a competitor’s ad next to your registration form.

5. Use a Pre-Event Questionnaire as part of the RSVP process to improve meeting content. You'd be surprised what people will tell you if you ask! Ask invitees what they hope to get out of your meeting or event and take suggestions on how to ensure you are meeting their needs.

6. Ask attendees what you need to know to put on a flawless event. During the registration process, ask about meal choices, special housing needs, arrival/departure dates, additional guests and more.

7. Keep your event on their minds. Send reminder and follow-up emails to make sure they don't forget, and include a means for each invitee to cancel an RSVP.

8. Track contact history to foster your relationships. Use task records inside of contacts and leads to log invitations, RSVP responses, follow-ups, and attendance. You can also archive questionnaire responses so you can track their special requests.

9. Keep an eye on everything, wherever you are. Use Salesforce and tools from the AppExchange to keep a close eye on your registrations. Your reports can tell you when to send a reminder invite or to expand your list of invitees. You can also use your list of confirmed attendees to compare with actual attendance.

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10. Work smarter, not harder. Take advantage of the latest tools including AppExchange Applications that specialize in meetings, events, and RSVPs.

Conclusions

Your event management can be a smooth process with salesforce.com and AppExchange tools. This technology permanently lays to rest the days of back-and-forth emails, time-consuming phone calls, and registrations entered one by one on spreadsheets. Plus, Salesforce can store important data about your event— attach your event budgets, post mortem notes, and questionnaire results so you can improve future events and relationships.

Planning an event with Salesforce and your AppExchange tools fulfills your need for easy, hassle-free event planning and your organization's push for better relationships with customers and prospects. With these tips and your new tools, you'll maximize your ROI on all your group's events.

Elias is Director of Product Marketing at Acteva. ActevaRSVP is Acteva's latest on-demand business solution. With ActevaRSVP, you can easily invite leads and contacts to your event and track their RSVPs within Salesforce.

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About Acteva and ActevaRSVP

ActevaRSVP is another powerful yet simple on-demand business solution from Acteva. Designed exclusively for salesforce.com AppExchange, ActevaRSVP is ideal for managing all types of simple, free events.

Acteva also has deep roots in providing service to organizers running more complex, paid events. Since 1998, over 12,500 customers have used Acteva to manage more than 215,000 events and process more than 3.4 million registrations. Acteva's customers include Whole Foods, Bausch & Lomb, Pfizer, SAP, Girl Scouts of America, Craigslist Foundation, and thousands of small to large-sized businesses and organizations. Acteva is headquartered in San Francisco, California. More information is available at www.Acteva.com and www.ActevaRSVP.com.