7 steps for getting more successful customer meetings at events

The modern rules to realize great ROI from events

Introduction

There are many moving parts to keep track of, to get to more successful customer engagements at events and the process has evolved into a fine art. Multiple event managers have learned to juggle with what seems like hundreds of spreadsheets and emails along with phone calls, internal programs, and travel plans and still end up missing the bus over a significant number of meeting schedules and as a consequence, event ROI.

What this means is that millions of dollars are spent on an event and the success of the event is measured only through 'feel-good' metrics like the number of visitors to the booth, enquiries for demos, location of the stall and footfalls. More often than not, these metrics fail to enthuse the C-level suite and budgets for forthcoming events are challenged. What will drive better participation at such events is a quantifiable Return on Investment that is often elusive to find unless specific metrics are defined beforehand. Many successful marketing teams have adopted the proven, cloud-based Meeting Automation Platform (MAP), the application that helps one get the right handshakes that lead to a significant increase in 'influenced revenue'.

Such meeting automation platforms take the grunge work out of scheduling hundreds or even thousands of qualified meetings, free up resources, help manage meetings with qualified event attendees, and enable the company to realize significant ROI from events.

At MWC 2019, 50 leading companies booked over 14,000 meetings for the four day event, driving over a billion dollars in influenced revenue.

While events are a great place to drive business growth where potentially hundreds of customers, prospects, and partners meet and hundreds of press meetings can be conducted over two to three days, it is important to focus more on engaging qualified attendees for advancing sales or achieving strategic goals/objectives. Such scheduled engagements are known as strategic B2B meetings. To successfully increase the number and quality of strategic B2B meetings, you should consider these rules of engagement that were derived from best practices used by successful meeting planners, executive admins, and event managers:

Rule #1: Evaluate your event meeting-scheduling workflow

Meeting Automation Platform (MAP) is a workflow automation software for simplifying meetings at events and B2B environments. They usually integrate well with badge scanning software, event registration and event mobile apps.

The process of managing meetings at events from start to finish can be cumbersome and tiring. You need to manage a huge list of tasks from pre-meeting scheduling, to in-meeting management, and post-meeting analysis.

Setting the agenda, sending out invitations, selecting the speakers, managing the logistics, seeking approvals, sending meeting reminders, and determining the metrics you need to track are all part of just the pre-meeting phase. During a meeting, you need to manage check-ins, prepare briefing packets, identify and make available the right resources, and track the performance of the meeting. Post meeting, there is measurement of metrics, surveys to be undertaken, and reports to be prepared.

All this can be overwhelming and this is why you need to consider the next rule.

Rule #2: Use automation software to schedule, manage, and track meetings

You can take a big step towards efficiency by using fewer tools, keeping all information in one place, and consolidating tasks. For example, if you are using a spreadsheet for organizing event information, a calendar to block meetings, an email to send event invites, you already have too many tools.

The best way to optimize workflow is to create the right environment to keep employees productive, and a meeting automation platform helps you get rid of most of the manual work associated with maintaining spreadsheets and reviewing them constantly for scheduling meetings; pre-meeting tasks such as logistics, communication, and even meeting strategy gets streamlined.

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Further, invitee duplication errors, time zone issues, and missed invites are all sorted out for you on a dashboard where you can also assign roles and monitor progress in real time. This significantly frees up executive time to focus on the real goal – conducting successful meetings.

85% Reduction

in scheduling effort through automated meeting platforms

It has been proven that meeting automation reduces the scheduling effort by up to 85%, leaving executives' time to focus on what is really important – managing meetings and bringing them to a successful conclusion. This is a significant improvement on the earlier reliance on spreadsheets and manual diary notations.

What is even more significant is the way in which automation tools can integrate with your sales CRM and mine that data to ensure that key prospects who are qualified as leads are not missed on the invitee list. Separate meeting goals can also be set for prospects across the Salesforce CRM funnel, and separate invites with different agendas can be set for leads, contacts and prospects, making meetings more relevant for the participants.

Rule #3: Collect the right metrics for evaluating your ROI

> "It has really enhanced my ability to be more productive as a leader with an organization and to show my value through the data that I could measure and report on."
>
> -Tanya Andrade
>
> Chief Customer Officer, Event Marketing Authority

What is the outcome you desire from participating in an event? It is a good idea to set objectives to track the success of your meetings prior to the event. It will be impossible to collect the data for any change you make in your objectives post-event, and it will not be possible to determine the return on your investment.

90% of successful meetings have pre-defined objectives

With automation software, outcomes such as ‘number of successful meetings held’, leaderboard for attributing meetings to sales executives, utilization levels of meeting rooms and demo stations, and the influenced revenue projection per meeting and win rate, are also tracked through the post-meeting analytics if those are the objectives that you have set for yourselves. Being able to measure the outcome accurately, positively impacts your budget and resources for upcoming events.

Rule #4: Provide a range of engagement types to support different attendees’ needs

Set the context of your meetings in advance to find your relevant handshakes for better results. It is recommended that you do this across a wide range of customer touch points at an event - booth tours, executive meetings, analyst meetings, demos, partner meetings, dinner meetings, press meetings, and expert sessions.

The more opportunities you provide customers and qualified prospects to engage with you, the better the outcome. A good automation tool should be able to seamlessly handle multi-location meetings (bookings and confirmations of multiple venues) and types of meetings along with the internal and external attendee invites and confirmations. Setting the right context for the meetings also improves the chances of meeting invite acceptance by over 62%.

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Rule #5: Enhance the ability of requesters to easily book more meetings

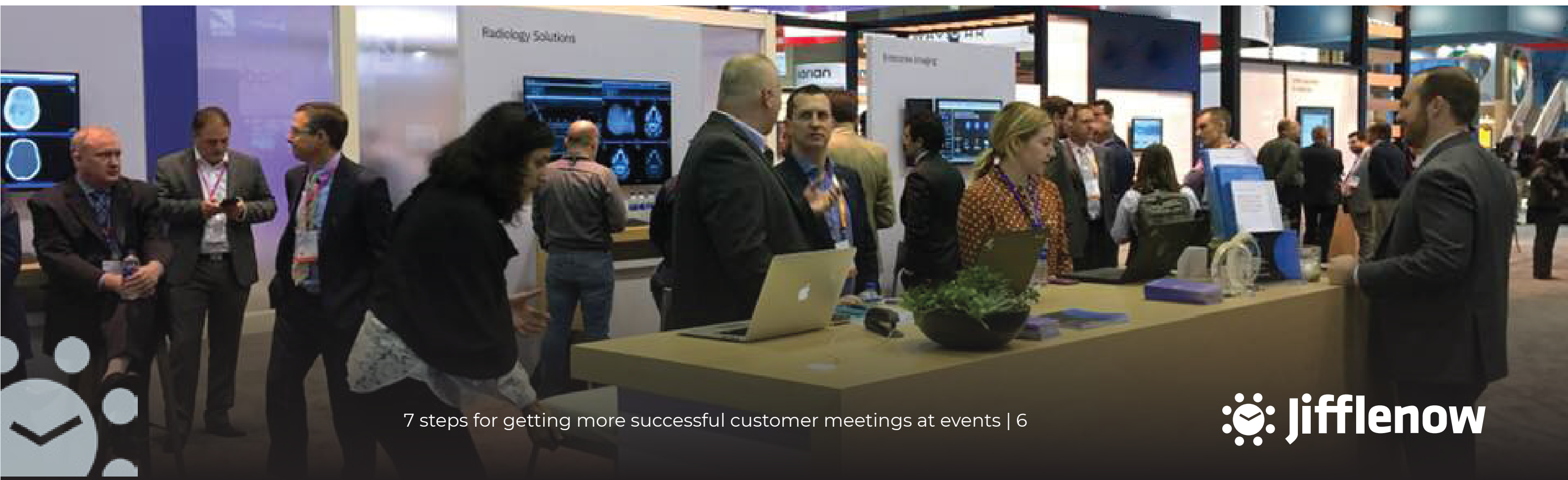
It has been estimated that it takes as many as 14 emails to book a single meeting between multiple team members-from requesters, to meeting managers to approvers to attendees.

> “The problem of the century has been solved - pulling all the experts, resources and meeting rooms together at a major event.”
>
> -Lina Dion
>
> EBC Events & Expension Lead, Amazon Web Services

However, by using a Meeting Automation Platform that is integrated with a CRM such as Salesforce, meeting requesters can schedule meetings directly from within the CRM from the account, opportunity, or lead level from within the native Salesforce interface.

By doing so, they avoid the hassle of juggling between tools to schedule and track prospect and customer meetings. The process also eliminates the need to manually update each system with information, saving time and effort.

With MAP, it is easier to collaborate with multiple stakeholders to ensure that everybody is at the right meeting at the right time. Requesters, usually sales teams, can actually improve their meeting confirmations by 40% to 200% over the use of conventional tools. An intuitive User Interface on the MAP solution also improves the efficiency of the sales team to schedule, manage and analyse meetings at B2B events.



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Rule #6: Ensure security and scale to support a high volume of meetings

Cloud based meeting automation tools come with role-based security that ensures need-to-know information is available to stakeholders based on their hierarchy and responsibility.

They provide enterprise-class security and eliminate the need for hardware, constant upgrades and updates and bridge siloed on-premise systems. Standard cloud services security layers are also built in, such as 256-bit encryption of data, even at rest. Additional security is provided by the data center, such as Amazon Web Services that undertakes recurring assessments to ensure security is compliant with industry standards. In addition, hosts such as Amazon Web Services are committed to EU GDPR compliance.

There is nothing much to worry about here, although you are urged to go through the data privacy clause of the service provider before you sign up for their cloud-based meeting automation services.

Rule #7: Measure results and analyse ROI

Imagine the power of using data from the CRM and mapping it to the data collected post-meeting at an event. Imagine being able to collect influenced revenue projections and present it to the leadership team to justify event expenditure and push for budgets.

1. Evaluate your event-meeting-scheduling workflow.

Manage huge lists of tasks for an event workflow by using fewer tools.

2. Use automation to schedule, manage and track meetings.

Manage meetings and bring them to a successful conclusion.

3. Collect the right metrics for evaluating your ROI

Positively impact your budgets and resources for upcoming events.

4. Provide a range of engagements types to support different attendees' needs.

Provide multiple opportunities for customers to engage with you.

5. Enhance the ability of the sales team to easily book more meetings.

Collaborate with multiple stakeholders effortlessly.

6. Ensure security and scale to support a high volume of meetings.

Securely scale to a million meetings on the cloud.

7. Measure results and analyse ROI.

Justify expenses and push for better budgets for the next event.

Metrics such as number of meeting invites accepted, average deal size, number of meetings per deal closed, are extremely useful when evaluating the success of campaigns and ROI and a good meeting automation software should provide you with all these and more, usually in visually strong and intuitive dashboards.

Conclusion: It makes sense to adopt a Meeting Automation Platform

It is obvious that an automation solution is key to successfully hosting meetings at an event. However, not all automation solutions rise up to the occasion, especially at scale. One needs to carefully evaluate options that meet the organization's goals in terms of quality of meetings, number of meetings, reliable meeting analytics as well as a robust event workflow.

An enterprise-class Meeting Automation Platform should be able to cover multiple event scenarios - event meetings; briefing centers, kiosk walkthroughs – and provide meeting insights (analytics), application integration, a staff scheduler, and a mobile application. A MAP typically has the ability to scale to thousands of meetings.

> "Jifflenow has helped me condense the tools I am using to one – and concentrate on footfall, ROI and customer experience at our briefing centers."
>
> -Parasto Shamlou
>
> Senior Global Executive, Briefing Center Specialist, Plantronics

One company that is at the forefront of MAP technology is Jifflenow. Its cloud-based MAP solution, for example, integrates with Calendars (GCal, Outlook), CRM (Salesforce), Marketing Automation (Marketo), Mobile Apps (Crowd Compass, EventBase), Badge vendors (Validar, Aventri), Video Conference (Zoom), as well as registration systems (CVent, Rainfocus, G2Planet). It can also be customised to meet multiple customer needs and use cases.

Over 60 Fortune 1000 customers are currently using the Jifflenow MAP and have improved their meeting success rates both quantitatively and qualitatively.

The next step in the evolution of the platform is integration of Artificial Intelligence, to create predictive meeting capability to understand and know what meetings are necessary for revenue growth.

"I would definitely recommend Jifflenow as a means to evolve from spreadsheets and Outlook to automating face to face meetings and letting people manage the meetings rather than spend time scheduling them."

-Liz Lathan

Co-founder, Haute Dokimazo

A software company that implemented Jifflenow MAP:

99%

more meetings

$796 million

influence pipeline over 3 years.

Jifflenow is the world's #1 Meeting Automation Platform (MAP) that helps enterprises accelerate business growth by automating the scheduling, management, and analysis of strategic meetings at events, briefing centers, roadshows, executive sessions, and training forums. This advanced SaaS platform offers enterprise-class analytics, security, GDPR compliance and integration with leading sales and marketing software. Jifflenow is the most trusted MAP with over 200 enterprise customers including numerous Fortune 1000 companies.

The company is backed by Sequoia Capital, Accel, and Saama Capital and is based in San Jose, California.

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THE WORLD'S #1 MEETING AUTOMATION PLATFORM

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