

# Why Your Event Directors Are Key to Sales Growth

*Give your event teams the tools they need to make your event a business success*





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## Introduction

Event professionals are your conference's air traffic controllers. Except instead of coordinating the departure, arrival and flight patterns of many aircrafts at once, they are quarterbacking meetings between external attendees (customers, partners, influencers) and your company's executives, product experts, and sales teams. It is also important to note that the hottest trend at events is to pre-schedule B2B engagements with targeted attendees, instead of the frenzy of scanning thousands of badges of unqualified attendees who simply want the free t-shirt or looged squeeze-ball.

Does the job of an event manager/director sound stressful? That's because it is.



CareerCast ranks event planner/director as one of the most stressful job in the world. The only other profession more stressful are firefighter, military personnel, police officer and airline pilot.

For those of you who are curious, CareerCast used an advanced methodology to determine the amount of stress a worker can predict to experience in any given job. When you review the categories (amount of travel, working in the public eye, meeting the public, and deadlines), it's clear why event coordinators are at the top of the list of professionals who have a hard time sleeping at night.

So, if you're a company hosting a major event, sponsoring trade shows or managing many smaller events that attracts hundreds and even thousands of people and costs millions to produce, would you burden your event planners with outdated error-prone manual tools that will turn an already anxiety-inducing job into a descent into madness and despair?

If your answer was "no" then keep reading.

Often times event directors are stuck with manual systems that make visibility into meeting progresses opaque at best. Burdening your event directors with spreadsheets or expecting to get meetings managed in Outlook or GCal would be like asking an air traffic controller to wear a use a laptop. When meetings fail, event planners are often left going through piles of paper wondering what happened... but the clues to the crime are all too familiar and all too obvious.

They are as follows:

- Manual errors (such as time zones and double bookings) that caused customers and executives to miss important customer meetings.
- Lack of clarity on agenda, purpose and opportunity for a meeting request that resulted in inadequate internal attendee participation.
- Too many back-and-forth emails to schedule and re-schedule meetings and change requests.
- Low attendance of scheduled meetings due to insufficient reminders, delayed confirmations, mix up on meeting room and locations, etc.
- Not having a digitized process to manage these meetings.
- Lack of good data and analytics tools to gather key event metrics like influenced-revenue to justify the ROI to management.

To help event professionals succeed, JiffleNow, the Meeting Automation Platform (MAP) pioneer, has created a cloud-based software solution designed to make the coordination of strategic meetings easy and simple. With input from JiffleNow customers, top analysts, and first-person insights from our own event director whisperer, we cover the following topics:

The life of an Event Director is harder than you think.

- Why manual paper or spreadsheet-based meeting management tools fail?
- How MAP software makes an event director's life easy.
- Event managers hate Outlook.
- Why more event directors choose JiffleNow.

So, let's see how you can make your event planner's life a little easier and, in turn, your conferences more successful.



## The Life of an Event Director is Harder than You Think

According to a recent report by **Aragon Research**, many companies spend millions on producing large scale conferences, yet — when it comes to the management of strategic B2B meetings at these events — they are left asking these rhetorical questions:

“ Who is responsible for identifying potential candidates for meetings at an event? How do they decide who to invite? How is the agenda developed and communicated? Who communicates with invitees prior to the event? Where is the data about meetings stored, and who can access and update it? Who takes notes in meetings, and how are they maintained and disseminated? Who evaluates the success of a meeting, and what criteria are used? Who determines the next action, and who is responsible for further communication and additional activities, and how are these decisions made? Survey all roles to determine what works and what doesn't, asking for quantified responses. For example, how often do you need to reschedule a meeting, what are the usual causes for rescheduling, and what percentage of your invitations are declined, ignored, or require further information?

Of course, the ultimate goal for event directors is to help sales teams turn prospects and customers attending the event to advance sales cycle and close business faster by virtue of having high-value strategic meetings connecting customers to appropriate company representatives best suited to respond to their needs.

Event directors aim to maximize real business opportunities during events by increasing the number of face-to-face strategic meetings with the right audience with the right message at the right time.

According to JiffleNow CMO **Ravi Chalaka**, the most frightening challenge to event directors managing these meetings is the sheer number of people involved in the process. Event directors are not just managing a cast of thousands, they are playing matchmaker to a cast of thousands, including attendees, product experts, executives, etc. “These events require the participation of meeting requestors (usually sales), meeting coordinators (from events team) or temp staff, executive admins (supporting C-level and VP schedule), product experts, event coordinators and event staff (including temps or people from remote offices where events take place), and back office analysts,” says Chalaka.

He continues, “The handoffs can cause issues, manual errors, wrong time zones. Meeting attendees both external and internal frequently change plans and this becomes more complicated to manage due to the duration (three to five days) of most events.”

With so many planes in the air, asking an event manager to rely on manual processes, even with email and spreadsheets, is like asking an air traffic controller to do their job blindfolded. Event managers deserve better tools yet are often stuck with outdated ones.

The answer of “**who**” in all these questions is usually the **event director/manager**.



## Problem with Spreadsheet-based Processes

When event directors struggle to successfully coordinate strategic meetings it is usually due to the burden of paper-based management tools or Outlook. But as any event director can attest, spreadsheet, document-based calendars and other manual meeting process get more unwieldy and cumbersome as the number of meetings scale.

The problem with paper-based processes gets especially troubling for event directors due to the blind spots and gaps in communication that occur between each of a meeting's three stages:

- The planning and scheduling that occurs in “pre-event”
- The management and measuring of “in-event”
- The analysis of “post-event”

Between each stage of the meeting lifecycle, event directors often worry about dropping the ball due to large volume of requests and requirements and each company's unique needs for approvals, participation criteria and lack of consistent information needed to make decisions. Between stages, the information — when managing hundreds (or thousands) of meetings within a single conference — becomes complex, error prone and insecure when solely depending on either spreadsheet-based calendars or using basic meeting scheduling software.

JiffleNow Head of Strategic Accounts **Aaron Karpaty** is known in the industry as the event director whisperer. Karpaty has helped event directors at some of the world's biggest companies succeed because he knows their responsibilities and challenges better than anyone.

“I think the other biggest pain for event directors is that – with manual processes – they have no visibility to the data or what's happening in meetings at events,” says Karpaty. “I can't tell you how many Fortune 500 companies spend millions of dollars on conference booths, dinners and travel and have multiple meeting rooms, but they don't even really know how many meetings they've had. I've asked if they have visibility in those meetings that relates to pipeline or revenue, and they respond, ‘Oh no, we don't know any of that.’ So visibility into what's going on in those meetings and how they measure performance is a big, big issue.”

For every relevant type of B2B meeting (sales advancement, intelligence gathering, brainstorming, etc.), event directors need to identify and assess current roles and responsibilities, processes, data sources, and dependencies. To do this with spreadsheets can be a nightmare.

“If you're an event director working with manual processes like spreadsheets then you're constantly putting a puzzle together with people's availability with room availability with the customers' availability”

Aaron Karpaty  
Head of Strategic Accounts, JiffleNow

“So, when last minute changes occur, it's almost like taking the puzzle apart and having to figure out how to put it back together. So, it's very intense to do these things manually with spreadsheets and Outlook and all the back-and-forth emails.

He continues, “For example, let's say a sales rep needs to find an executive or a product expert to take a meeting with a prospect; the sales rep then needs to find out from the event director if there is a room or a certain demo station that's available to have this meeting at — so right off the bat there's a lot of back and forth.”

A more sophisticated modern approach to managing meetings and gathering data is needed.

Modern **MAPs** can improve and measure effectiveness at all three phases: **pre-**, **in-**, and **post-meeting**.

## How MAP Software Makes an Event Director's Life Easier

Enterprises want more B2B meetings at events to grow its business faster. To help event directors simplify, streamline and increase the scheduling of strategic meetings while creating a better experience for event attendees, more companies are investing in Meeting Automation Platforms (MAP). With more and more customers attending events in larger numbers to engage with companies they wish to consider for solutions, not having a MAP solution is an unnecessary business risk.

As many event directors know, MAP is a category of software that automates workflows associated with pre-meeting planning, in-meeting management, and post-meeting analysis and follow-up. A comprehensive MAP increases the number and quality of strategic meetings and are especially effective for enterprises that need to manage high volumes of strategic meetings at events, briefing centers, roadshows, sales meetings, and training forums.

Aragon Report defines Meeting Automation Platform as software that offers these key meeting automation capabilities:

- Automated scheduling, management and analytics.
- Integrations via APIs.
- Mobile-first apps for ease of use.
- Role-based security that even internal users can see on a need-to-know basis.
- Compliance to ensure that regulations such as GDPR are supported.
- Enterprise scale to thousands and millions of meetings.
- Digitize meeting data for tracking from marketing and sales management software.
- The ability to recommend meetings that need to take place to drive a particular outcome.

## The Meeting Lifecycle

### Pre-Meeting Activities

#### STRATEGY:

- Identify issues that require meetings
- Create agenda
- Identify appropriate meeting participants
- Develop compelling invitation message personalized for the invitee

#### LOGISTICS:

- Automated meeting scheduling
- Confirm availability for participants
- Reserve/book meeting space
- Track changes

#### COMMUNICATIONS:

- Invite all participants
- Provide sufficient context to entice invitees to attend
- Send reminders as appropriate and any change notifications






A modern best-in-class MAP solution integrates with sales and marketing software, such as CRM, marketing automation, and event software like badge scanners, event registration, and event mobile applications. Additionally, MAP application offers enterprise-class security and comply with GDPR (General Data Protection Regulation).

Speed enables the team to schedule more quality meetings with the right participants. With transparency, event directors can ensure everyone clearly understand the purpose of the meeting and are better prepared to make the most of the engagement. Event directors can now provide metrics about the value of the investment made on each event by seeing influenced revenue, exhibit space utilization and leader boards among sales teams. Security ensures that only people who need to know have access to the information. By having the right attendees who are better prepared to meet the needs of the meeting, the eventual sales process is enhanced significantly. Opportunities advance through the sales cycle and increase chances of winning.

All of this makes event directors look very good.



The benefits of a **MAP** solution to an event director are **immeasurable**, especially when it comes to **speed, transparency, insights** and **security**.

## The Meeting Lifecycle

### In-Meeting Activities

#### MANAGE:

- Record/log check-in/out of participants
- Document and display any commitments for follow-up activities

#### MEASURE:

- Automated analytics management
- Collect data for any required analysis, including behavioral notes and surveys
- Track individual contributions, questions, and commitments

### Post-Meeting Activities

#### ANALYZE:

- Use descriptive analytics to evaluate the meeting
- Use predictive analytics and/or machine learning to identify next best actions

#### FOLLOW-UP:

- Send any requested/promised materials
- Schedule any activities required for commitments
- Send appropriate thank you notes
- Update institutional memory (integrated enterprise applications)

## Event Managers Hate Email

Even with all the value of a MAP solution, sometimes event directors have a hard time selling executives on the need for such an investment. Executives who are penny wise and pound foolish often fail and cause others to fail, too. What must event directors do to sell the value of MAP to their CMOs? Mention deal size and what's the risk of having this meeting flop or not happen.

? If this is a **\$300,000** average deal size and you have two executives in the meeting that each make **\$250,000** or more a year and you got a customer in that meeting, doesn't that justify an automated process that's going to make sure you have no conflicts and that everybody's gonna get the right people at the right time and the meeting's actually gonna happen?

says Karpanty. "And so it's usually a no-brainer answer for people when they start talking about the cost."

Another common resistance to the adoption is many executives believe their event directors can use Outlook. According to Karpanty – and confirmed by event directors — there's a long list of reasons why meetings cannot be managed in Outlook.

"First of all: **Outlook is a data black hole,**" says Karpanty. "I can't go and run a report in Outlook and say show me all of my meetings with IBM and what kind of pipeline was associated with those meetings. I can't run a meeting report by rooms and find out if we optimized the usability of that room."

He continues, "There's no running reports or collecting data out of Outlook. And then unless somebody's on 365 then there's no Cloud interface to have everybody working in there to make last minute changes and updates in real time. It's just not set up to manage meetings at events with all the complexity and the different workflows. There's a lot of pain around managing things on spreadsheets and Outlook because of complications with time zones and people not showing up and there's no real way to track it all down. Event directors find Outlook to be a nightmare."

As more event directors embrace the power of MAP, they've realized that a purpose built, cloud solution's ability to eliminate the need for hardware, constant upgrades and updates, as well as eliminate the blind spots of toggling between silo'd on-premise systems as a huge advantage. And that's why more event directors choose MAP from JiffleNow.





# Why More Event Directors Choose JiffleNow

With JiffleNow, event directors have a complete meeting solution ecosystem. JiffleNow simply and easily integrates with sales, marketing, calendaring and 3rd party event software. And the solution's robust APIs let other tools integrate and sync data with the platform.

Because JiffleNow is a cloud-based MAP, it can scale to keep up with the needs of the most demanding enterprises that schedule thousands of meetings every year. At the recent four-day MWC (Mobile World Congress) JiffleNow's top 50 customers scheduled more than 15,000 B2B meetings using its MAP. That's why JiffleNow is the most trusted MAP solution in the world with hundreds of enterprise customers and over 50 Fortune 1000 companies.

"Our solution is especially effective for event directors that need to manage high volumes of strategic meetings at events, briefing centers, roadshows, sales meetings, and training forums, says Chalaka. "The software is easy and intuitive to use and automates workflows across the meeting associated with pre-meeting planning, in-meeting management, and post-meeting analysis and follow-up."

JiffleNow helps event directors be successful by automating the scheduling, management, and analysis of strategic meetings at events, briefing centers, roadshows, executivesessions, and training forums. JiffleNow makes sure your event directors find attendees, meet them, help them, and turn them into happy customers. And that makes for calm, happy event directors, too.



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 Partners, and Saama Capital and is based in San Jose, California.



THE WORLD'S #1 MEETING AUTOMATION PLATFORM

[www.jiffleNow.com](http://www.jiffleNow.com)