Fostering sales enablement success with integrated technology solutions.

$8,000  7 hours  30%

saved per event  saved per event  cost savings total
importing leads

CPA Global is a leading software management and technology provider for Intellectual Property and patents. Sharon Summers, Director of Global Events, manages dozens of annual trade shows and conferences. Her small team supports sales enablement and reinforces CPA Global’s position as an innovative industry thought leader.

Suffering in Silos

At CPA Global, the marketing, sales, and events teams originally operated in silos with disparate systems. Sharon was tasked with importing leads from trade shows into Salesforce, but found the manual process took up to seven full days of her time. Leads would go cold by the time they were imported and data was incomplete or inaccurate.

Sharon explains, “We do more than thirty trade shows every year and my team is spread out all over North America. Just getting the business cards back is the number one pain point. Doing manual data entry would take me days.” She also spent hours manually transcribing onsite conversations from sales reps for lead generation.

This extensive process often resulted in nights and weekends spent squinting over business cards. “My sales director saw me at my desk at night doing
data entry and said there's got to be an easier way,” says Sharon. She decided to transform the outdated manual system with modern event technology.

“My leads were imported into Salesforce within twenty-four hours of the end of the conference. Everybody was so happy and Cvent made me look like a superhero.”  
- Sharon Summers, Director, Global Events

Adopting Cvent’s Universal LeadCapture

In 2018, Sharon and her team integrated Universal LeadCapture into their existing Cvent tech stack. “After adopting Cvent for our registration process, I explained that we could be using Cvent for so much more than just our annual user conference,” she notes. Her executive stakeholders agreed. “My vice president had just gone to a big conference in our industry. Thank God Cvent was there offering lead retrieval because he thought it was great. Selling him first was instrumental in selling this to the rest of our VP’s,” she notes.

Sharon calculated important savings in discussions with her executive stakeholders. “It was taking me about seven hours per show just to do the data entry, which was almost $8,000 on the company just for my time,” she says. She also noted how qualifying questions could help with both the quality and speed of leads.

Importantly, this cutting-edge technology could also help reinforce CPA Global’s position as an industry thought leader. Sharon explains, “Our industry doesn’t offer lead retrieval for most conferences. When they do, it’s a bad scanner. You don’t even know if you scanned it, and there are no qualifying questions. With Cvent, I saw this as an opportunity to reinforce our position at the forefront of the industry.”

Leading Sales Enablement Success

After successfully adopting Universal LeadCapture, the reactions from Sharon’s sales team were enthusiastic. “Within two hours of using it, our sales reps were asking, ‘Where has this been all my life? This is amazing!’,” says Sharon. At a tradeshow in February, the reps had scanned all cards, qualified each lead, and added all conversations by the third day of the show.

The sales reps could easily qualify leads onsite and route them directly to the correct rep. Sharon could remotely monitor usage by her sales reps through the portal and follow up while they were onsite. Most importantly, it eliminated days of manual labor waiting for leads to be active. Sharon was able to import all leads into Salesforce the day after the conference. She explains, “For the first time in four years of working for CPA Global, my leads were imported into Salesforce within twenty-four hours of the conference. Everybody was so happy and Cvent made me look like a superhero.”
Elevating Event Leadership at CPA Global

Sharon’s efforts to streamline the lead management process for her sales team has elevated the importance of events within the organization. “The trade shows are where we invest a lot of money and hope to get ROI back,” she notes. “I feel Universal LeadCapture is a huge tool in helping to achieve that success. Even the qualifying questions help our sales team because we are able to capture data with just two clicks on the iPad; that’s data we would have missed out on if I sent them without the tool.”

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-Sharon Summers, Director, Global Events
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In total, she estimates 30% cost savings in using Universal LeadCapture. In addition, the speed of leads has created more opportunities for qualified leads than ever before. “The number of opportunities that I’ve seen derived from the conference has been much quicker. Now, my salespeople have been able to hop on the phone immediately and I’ve seen more opportunities appear out of Salesforce,” she adds.

Sharon’s success has helped position her as a technology leader within the organization. She explains, “I’ve been recognized as an innovator within my company because Cvent has allowed me to bring new and innovative technology solutions to every leg of my events.” Using Universal LeadCapture has helped remove the pressure from her shoulders and enable the sales team with the leads they need.

“Cvent understands what Event Managers need and how important automation, metrics, saving time, proving ROI, and new technology are,” she adds. “It has really allowed me to reposition myself. The time savings that using Cvent technology has allowed me has been phenomenal.”