AMP Financial Planners Association Ltd (ampfpa) and Hillross Advisers Association Inc (HAA), together known as ‘The Adviser Associations’, are non-profit, member-based associations for financial planners in Australia. Their primary role is to represent, protect and enhance the interests of their members. The association organises conferences, peer groups and forums throughout the year to provide members an opportunity to learn, network, and participate in further building the association community.

“Cvent helped bring our events into the 21st century. I feel confident that our events are professional, well-run and most importantly, well received by our key stakeholders”.

- Emily Doyle, Member Services Manager, ampfpa & HAA

Problem: Disjointed systems, endless waste of hours

The Sydney-based Executive Office runs two associations with a team of five people and has been organising state-based conferences since 2012. From the very start, their approach to managing events leaned heavily towards manual systems and paper-based forms, creating a myriad of operational issues.

For instance, the entire registration process constituted a series of manual tasks that consumed a lot of man-hours. Invitations were sent as PDF attachments with a registration form that members had to fill up and return via email. This information was then collated by a staff member and put into an excel spreadsheet, which was printed and physically signed by members in person on the day to confirm attendance. All in all, this required a considerable amount of work for the team, who were already stretched to the limit.

Over time, the association started using various other tools like MailChimp and Salesforce to manage memberships and send bulk emails. However, the lack of an event software that offered integration functionality with these tools forced the team to come up with manual workarounds. Working with several disjointed systems increased the number of touchpoints, which in turn increased the likelihood of errors and the time spent on planning a single conference. Overall, there was simply not enough value being added to justify the effort involved.

“There was a lot of manual work to do and with limited resources, this was taking up a lot of time that could have been spent elsewhere”, says Member Services Manager Emily Doyle.

Why Cvent: Making the transition from manual

The Adviser Associations were in dire need of a solution that would cut down on manual work, provide more attendee visibility and offer better integration with their other tools.
Since they were a non-profit organisation, their focus was to incorporate technology that would streamline their event management process and ensure a better experience for their members.

This was when they decided to shift to Cvent. Looking at Cvent’s advanced event management functionalities and integration capabilities, they were eager to find out how they could use it to make their events better than before.

“A huge amount of time was saved, in particular when Flex was introduced. This made creating the events and promotional emails even more streamlined, not to mention more visually pleasing!”

- Emily Doyle, Member Services Manager, ampfpa & HAA

1 platform to manage all events

Same team manages 40 events vs 24 previously

10% increase in overall registrations

After implementing Cvent’s solution, the association was able to manage the entire event process and offer more value to their members through a single platform. Since all the data was easily accessible at one place and ‘a single source of truth’ was now available, the possibility of errors went down significantly. Registration became much easier than before and they could schedule and send emails at any time through automation without requiring a dedicated resource to do so. A major stress relief came in the form of the OnArrival app as it allowed the team to effortlessly access event & registrants information on the day of the event.

The association also gained key insights into what members wanted from the events, which sessions they were attending, and how this could be used to award CPD points. Attendance data was leveraged to gain backing from potential event partners and offset operational costs.

“As a non-profit, we do not aim to make a profit from events but having Cvent helped us to quantify the number of attendees to show to potential event partners and help reduce the impact of the cost of running events for our members”, explains Doyle.

Another major benefit of having all the data at one place was that the team did not have to switch between different systems to access event information. This also made duplication of similar events a lot easier by cloning an existing event & update the details. They also did not have to worry over venue sourcing as Cvent enabled them to easily search from a network of over 255,000+ venues as well as reach out to multiple properties at once.

“The Cvent Supplier Network is a great tool for venue sourcing, taking the time and stress out of looking for a venue — and it’s free, which is AMAZING!”, Adds Doyle.

Result: Handling more with less stress

From using cumbersome, error-prone, manual-intensive systems, the association now has the tools and technology to consistently record data, pull critical reports, and conduct professional, well-run events. Total registrations have increased by 10% and stakeholders are getting more visibility than before into relevant event data simply by viewing the saved reports. With automated processes being used for promotional emails and sundry tasks, the events have become more streamlined and visually pleasing, resulting in massive time savings and significant reduction of manual load. The association is now able to drive better member engagement by producing 70% more events for its members than before.

PRODUCTS USED

· Event Registration
· OnArrival
· CSN