Merkle is a global data-driven, technology-enabled performance marketing agency. For over thirty years, Fortune 1,000 companies and leading nonprofit organizations have partnered with Merkle to build and maximize the value of their customer portfolios. Merkle’s Global Events program is a key driver for lead generation and opportunities within the organization’s larger marketing strategy.

For their expanding global events program, the team needed a technology solution that would assist in scaling their program success.

“Merkle’s events program is robust,” notes Jaclyn Sass, Director of Global Events and Marketing. “We participate in or host about 135 online and offline events annually, and it is also the largest lead-generator and opportunity-generator for Merkle.” The team knew integrating event technology into Merkle’s larger marketing tech stack would increase efficiencies, create automation streams, and develop greater sales-to-marketing alignment.
Bridging Data Gaps

Prior to integrating event technology into their MarTech stack, Merkle relied on inefficient manual processes. “Before partnering with Cvent as our event management tool, we primarily managed our events program offline using Excel, email, and spreadsheets. It was a pretty low-tech world for us,” notes Jaclyn. The Merkle team sought to automate its processes including email marketing, as well as optimize the onsite experience for greater attendee engagement. They also wanted to upgrade their outdated event management process to create data-driven insights for the organization. “There was really no integration between marketing and sales when it came to data flow as far as new leads were concerned or opportunities that were created,” adds Jaclyn. “There was no way for us to show any data behind the value that our events drove for Merkle.”

The team was also tasked with managing Merkle’s growing suite of international events, mirroring the success of the US program. “As our program and organization grew, we were asked to be a center of excellence for the organization,” explains Zoe Fernandez, Director of Global Events and Marketing. “We now have a footprint in APAC and EMEA so we’ve been asked to create consistency throughout the organization. That includes event processes, event data flow, management, campaigns, messaging where appropriate, and best practices.”

“Being able to have that Cvent integration, that data flow, and being able to track those leads that are entering the database is important so they can use that technology to track from start to finish.”

— Zoe Fernandez, Director of Global Events and Marketing
Creating a Seamless Dataflow with MarTech

Events play a critical role in pipeline attribution at Merkle. Jaclyn explains, “As an organization, we have identified a handful of KPI’s or metrics that we are measured against annually. Those include new to database, marketing qualified, sales qualified, and opportunities - number of opportunities, or value or dollars.” Zoe notes that these KPI’s are mirrored in their international regions as well.

Zoe believes that digital transformation is the key to their success, particularly as event marketers. Personalizing the attendee journey yields more valuable data points that provide important insights for the Sales and Marketing teams. “Digital transformation for us in the event marketing arena is important because we’re able to customize how we communicate with our attendees or potential attendees,” she explains. “We can develop customized experiences for them, and we’re representing our brand in a meaningful way.” Cvent’s Event Management solution allowed the team to create unique experiences for sponsors, partners, and clients. It also automated the flow of data between their registration tool, CRM, and marketing automation tool. OnArrival allowed the team to create key efficiencies with the onsite check-in experience and tracking attendee data. Using CrowdCompass has provided the team with communication tools for a seamless attendee experience. They are able to use push notifications to handle last-minute changes and updates. They have also been able to eliminate the need for a paper agenda and benefit from organic social marketing through the activity feed throughout the event lifecycle.

Leveraging Automation for Greater Sales-to-Marketing Alignment

In partnership with their Cvent account team, Merkle enabled key marketing automation and CRM integrations to create better sales-to-marketing alignment. Having the data flow seamlessly between systems allows the Merkle team to be much more efficient with their marketing efforts. A Salesforce integration allows the team to segment by key data points like industry, title, or engagement. “Once they are identified in Salesforce, they are sent an email from Pardot, which is our marketing automation tool,” explains Jaclyn. “They are driven to Cvent to register from our Pardot email, and then automatically added as a campaign member in Salesforce.”

These automated data points then enable the Sales team to meaningfully communicate with their clients. Real-time reporting is readily available for the sales and client teams through Cvent. Understanding the value of these integrations is a key aspect of Merkle’s marketing success. “The Salesforce integration allows us to quickly segment and communicate to our registrants and attendees by leveraging
connections with our email automation tools to customize the event communication experience for our guests,” notes Jaclyn.

Once onsite, the data carries through to Cvent’s Onsite Solutions. “They’ll check in through OnArrival, which automatically updates Cvent that they’re onsite. This automatically updates Salesforce that they have been at the event,” says Jaclyn. Enabling their sales team with qualified leads is then a seamless process. “When an industry trade show wraps, we will take the list of leads that we get from the lead scanner onsite,” notes Jaclyn. After loading those leads into Salesforce, “we’ll assign a sales lead in Salesforce and track the progress of any resulting opportunities,” Jaclyn adds.

**Optimizing Data for Greater Global Sales Opportunities**

Post-event data analysis allows the team to better support lead generation for their sales and marketing teams. “We’ll look at how attendees interacted with us onsite and then communicate with them post-event in a meaningful way using this data,” explains Jaclyn. Customizable reports provide detailed customer journey information regarding how contacts engage with the brand.

“The team uses the barometer of success from the US events to galvanize their international program. Zoe notes the APAC and EMEA regions have also leveraged Cvent for a selection of events to replicate the successful data flow and tie metrics back to their KPI’s. “Being able to have that Cvent integration, that data flow, and to be able to look at where leads are coming from are key,” notes Zoe. “Being able to track those that are entering the database -- whether it’s the new-to-database, marketing-qualified, or sales-qualified leads -- is important so they can use that technology to track from start to finish.”

“By implementing Cvent products as part of a wider event strategy, the marketing team was able to successfully scale Merkle’s event program to become a global multi-million-dollar opportunity generator.”

— Jaclyn Sass, Director of Global Events and Marketing
Showcasing World-Class Event Marketing Success

Zoe and Jaclyn have transitioned their MarTech use to optimize sales opportunities and lead generation within the pipeline. In 2018 alone, their global events program generated over 9,000 new-to-database leads, 6,000 marketing qualified leads, and over 300 sales qualified leads. “We know through our closed-loop reporting and by tracking KPI's that our events generate hundreds of millions of dollars for the organization in opportunities,” notes Jaclyn. “This shows us that our events are the largest opportunity and lead generator for the organization.”

Jaclyn and Zoe have seen how the organization has grown in understanding the intrinsic value of events over the last several years. “I have been with Merkle for over eleven years, so I have seen the change in the organization and how the larger company sees our marketing team,” says Jaclyn. She notes that their CEO has always been an avid supporter of the function and value of events within the marketing mix at Merkle, intrinsically understanding the value events bring. “It has been valuable to get a lot of other stakeholders behind us in showing the metrics and proving the value of events,” she adds.

In the near future, the team will continue to expand their international suite of events. They wish to continue refining their processes while simultaneously expanding their global footprint within the organization. Jaclyn and Zoe view the integration of Cvent technology within their MarTech stack as a key contributor to their success. “By implementing Cvent products as part of a wider event strategy, the marketing team was able to successfully scale Merkle’s event program to become a global multi-million-dollar opportunity generator,” Jaclyn notes. She foresees an expanded network of integrated marketing touchpoints across their suite of global events, allowing the team to be ever-more involved in their event marketing efforts across the entire network.