

Driving Maximum Value from Your Event Technology Purchase



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Introduction

You've completed the RFP. Your cross-functional team went through the hands-on demos. The decision has been made, the PO approved and signed and now, you've got a new best friend – the tech sales person.

What next?

For teams utilizing new technology, great service is critical; after all, it can make the difference between 'winging it' and optimizing your carefully-chosen investment. So when you're choosing new technology, make sure that all those marketing promises are buttressed with the provision of a team dedicated to your needs – a factor that can reduce the cost of ownership and drive real value into your investment. Here's how to choose the right technology partner for you.



Questions to ask your vendor: Why does customer success matter?



DID YOU KNOW?

75% of marketers say they'll be responsible for the end-to-end experience over the customer's lifetime

(Webinar Care)

No longer an afterthought, customer success has come into its own as a tried-and-tested business strategy. Consider some of the benefits of ensuring customer success: customer acquisition, customer retention, brand promotion, profitability and churn reduction.

In the conventional business model of the past, marketers were tasked only with the responsibility of generating a marketing qualified lead. However, in the current subscription economy, the responsibility of marketers has extended to ensuring customer success. In fact, many companies now give more credence to the value of customer success than to company profits or business success.

Your technology partner should not simply understand the customer success business strategy, but apply it stringently to each and every one of their clients. Ultimately, if they're focused on your success, your business can avoid operational disruptions, overspend and, most importantly, a lack of system functionality.

Why?



Consultancy firm Gartner estimates that **55% to 75%** of all ERP implementation projects fail to meet their goals.. Considering these projects are at least several months long or, more typically, take years, the fiscal and cultural health of the entire company is at risk if they go wrong

(Crestwood Associates)

“ According to a report by KX and the Centre for Business and Economics Research (CEBR), more than 80% of firms reported revenue increases after deploying real-time analytics systems and processes. ”

What types of onboarding and training will you get?



It's easy to get caught up in the novelty of your purchase, but a lack of onboarding or training can easily take the shine off your new technology.

Before your purchase is finalized, take the time to assess the quality of support services that are available to you and your team. What types of training and on-boarding will be provided? Is there an added cost for ongoing support?

It's also worth asking service providers to conduct a software demonstration prior to

purchase. However, be aware that canned presentations are designed to sell a product. Try and ask questions during the presentation and request that the provider perform tasks that aren't planned in the demonstration. This will offer an insight into the overall usability of the software and, likewise, how much training your team may need on the product.

Who are your points of contact?

When it comes to the provision of onward care, it's worth asking the vendor about the size of their support team.

It's also worth considering if they assign clients to specific points of contact to alleviate the frustration of having to be put on hold, of clients needing to repeat a specific issue to multiple agents or of clients having to contact the company with the same problem multiple times.

By providing your company with a select set of contacts who are familiar with your account and who know and understand your needs, the technology vendor can ensure that you are taken care of in a timely and efficient manner.



44%

of customers get annoyed, irritated, or angry when on hold for 5-15 minutes

(CX Today)



75%

of customers who use the phone for issue resolution report the interaction taking longer than expected

(Gartner)



70%

of customers are irritated when their call is transferred between agents or departments

(Zendesk)



33%

of customers are most frustrated by repeating themselves to multiple support reps

(HubSpot Research)

Can you make contact at crucial times?



You can't predict when issues with your software might arise.

But when things go wrong, you'll want to speak to your vendor's support team by phone or even live chat.

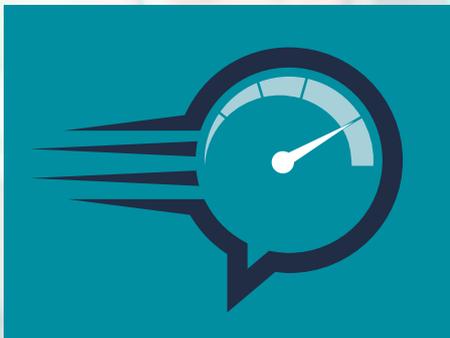
Before you make contact, make sure you know who – from your staff – is authorized to do so. It's also worth knowing the specific availability of your vendor's support team and if they have any kind of on-call provision.

Will issue resolution be seamless?

It's important to understand how the vendor's support team manages inbound queries from customers.

Is there a system to prioritize urgent issues or route them to more experienced support for faster resolution? And does the support team have a case management system to track each query or ticket until it's satisfactorily resolved?

When it comes to resolving problems, ensure that any changes to your system are seamless. This helps to avoid any lapses in system downtime, thus minimizing the potential for wasted time and money.



For

89%

of customers, speed of response and resolution are the two most important parts of excellent service

(RemoteHQ)

How will you vet potential providers?

Will your company truly adopt the features and functionality that excited everyone in the evaluation process?

This is precisely why it's wise to request that providers demonstrate the functionalities of your chosen technology outside of those presented in canned marketing demonstrations.

Here's a slightly different take on system vetting from Adrian Sager of Velvet Chainsaw, who urges that potential buyers, "Insist on getting the names of three existing, comparable clients who would be willing to discuss their vendor experience with you. (This is a little different from testimonials, which are usually written). Then be sure to follow up with a relevant contact in these organizations. Even though providers will generally offer you their happiest clients, it's amazing what you can learn when you make a call." Finally, ask these contacts about what features and functions they use most. What features do they rarely, if ever, use and why? What was their overall experience working with the vendor? What about their experience with the support team?"

Before evaluating solutions to any problems, identify the content to be managed. Start with all the sources, physical dimensions and quantities of paper and electronic files across various formats (e.g., email, digital voicemail, digital video, databases). Also consider digital and analog recordings as well as physical artifacts and samples along with any other non-standard sources of information. Avoid the trap of excluding end-users from the process; their knowledge of workflow detail is essential for proper configuration.

Lastly, be sure that your chosen solution is capable of integrating with any other systems you may already have in use (i.e., CRM, finance, membership, security, etc).

Shawn Casemore, president of Casemore & Co. says, "Many of my best clients are sold by the [vendor's] marketing team; however once the implementation is complete they are surprised by system functionality restrictions, lack of capabilities, and the impact on existing internal best practices."



Will you achieve successful implementation & onboarding?



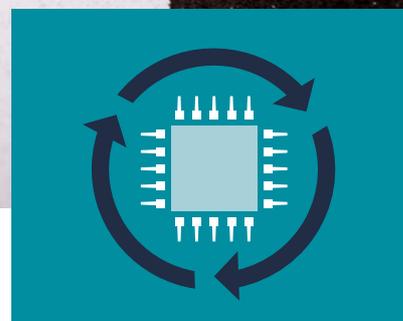
The smooth implementation and onboarding of new technology is up to you and your team.

When measuring the success of this process, be aware of your time, your resources and the promises your vendor makes to you.

A 2022 ERP report showed that the average budget per user for an ERP project is \$8,840. When you factor in how many users your system may have (especially for larger businesses), and added costs, you'll find an ERP implementation can cost anything between \$148,000 and \$739,000 for a mid-sized business. (ERPFocus)

So investing in training and change management is vital.

The best way to reduce or even eliminate this cost is to have your team invest significantly within the initial training process. Gaining a thorough understanding of the system and developing the internal expertise/resource necessary to address basic queries and issues internally will save endless time, energy and money in the long run. (VantagePoint)



According to global consultancy firm McKinsey, more than

70%

of all digital transformations fail

(Pemeco)

Can you communicate continuously after launch?



Monitoring and communication should be integrated into all stages of the implementation process – including after going live.

The process of software implementation is dynamic. This being the case, it's important for project leaders and managers to develop milestones, to monitor and communicate progress, to swiftly address any issues that arise and to maintain a positive working relationship with the solution provider.

It's also worth considering that you'll need to make some alterations based on user feedback as you move forward in using your software on a day-to-day basis.

Conduct milestone audits. By auditing each milestone during onboarding, you're ensuring that both your service provider and your internal implementation team are meeting their respective responsibilities.

Communicate with the vendor. After go-live, maintain communication with the solution provider regarding ongoing maintenance service – including technical assistance and software updates.



Conclusion

When it comes to new technology, the purchase is only half the battle.

Upon becoming a client, you enter a critical new — and sometimes delicate — phase. By utilizing the recommendations within this ebook, you and your team can ensure that you find not just the right partner for your company, but the solution that truly enables your organization to maximize its carefully-chosen investment.



Tip Sheet



Find a vendor that is customer success oriented



Ask for a demonstration of the software (ask questions and request that the provider demonstrate tasks not included in the canned demonstration)



Ensure that the vendor provides specific points of contact



Request the contact information for some of the vendor's other clients and ask them about their experience with the vendor



Thoroughly explore the needs of your company to determine whether the technology will be a right fit for your organization



Verify that the technology is compatible with your existing systems (such as your CRM, calendar integration, payments processing, etc.)



Make sure your employees are ready for the new system and are well-trained and comfortable with it



Monitor and communicate during all stages of the implementation process



Maintain ongoing communication with the vendor even after implementation

Points to consider: a recap



Q: What types of training and on-boarding are available to you as a company?

Q: How is support delivered?

Q: Does the vendor assign specific points of contact to their clients?

Q: Can anyone on your staff call support or just certain authorized staff?

Q: What days and hours can support be contacted?

Q: How does the vendor prioritize urgent issues or, if needed, how are issues routed to more experienced support staff for faster resolution?

Q: Does the support team have a case management system to ensure that every call query is tracked until it is satisfactorily resolved?

Q: Is there an added cost for ongoing support?



DON'T MISS OUT!

We have plenty of resources around virtual and hybrid events which organisers may find useful right now...



10 Reasons Businesses Invest in Event Management Software

<https://www.eventsforce.com/ebook/10-benefits-of-investing-in-event-management-software/>



The Event Planner's Guide to Event Communications

<https://www.eventsforce.com/ebook/the-event-planners-guide-to-event-communications/>



The Event Planner's Guide to Stress Management

<https://www.eventsforce.com/ebook/the-event-planners-guide-to-stress-management/>



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