


# How to simplify your event management

FROM PLANNING TO REPORTING





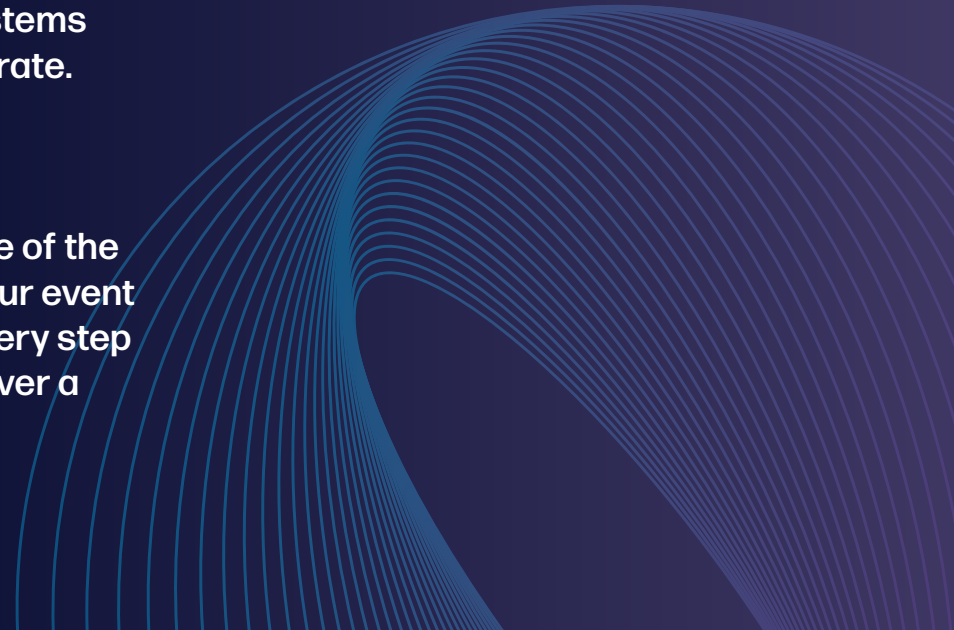
## EVERY EVENT – EVEN THE SIMPLEST ONES – HAVE A LOT OF ELEMENTS TO COORDINATE.

Keeping on top of all the details can quickly become a challenge.

Multiple spreadsheets. Platforms that won't integrate. AV systems that you need a PhD to operate.

Sound familiar?

In this guide, we detail some of the strategies to streamline your event management, to ensure every step of the way helps you to deliver a remarkable experience.



# SPACES + PEOPLE + TECH

When it comes to efficient event management, there's a range of elements to consider. Choosing the right venue, getting the right team in place and the smart use of technology, all combine to bring your event together into one cohesive experience.

3 key elements to consider:

- **Spaces:** Look for versatile locations that suit your event format. Also, consider transport considerations such as the availability of public transport and car parking options.
- **People:** Experienced and friendly event team for project management, broadcast and tech support, marketing, and graphic design to suit your event needs. For in-person or physical requirements, locally based teams to provide support.

- **Tech:** Best-in-class event management software with comprehensive functionality across budgeting, delegate management, interactivity, reporting and more.

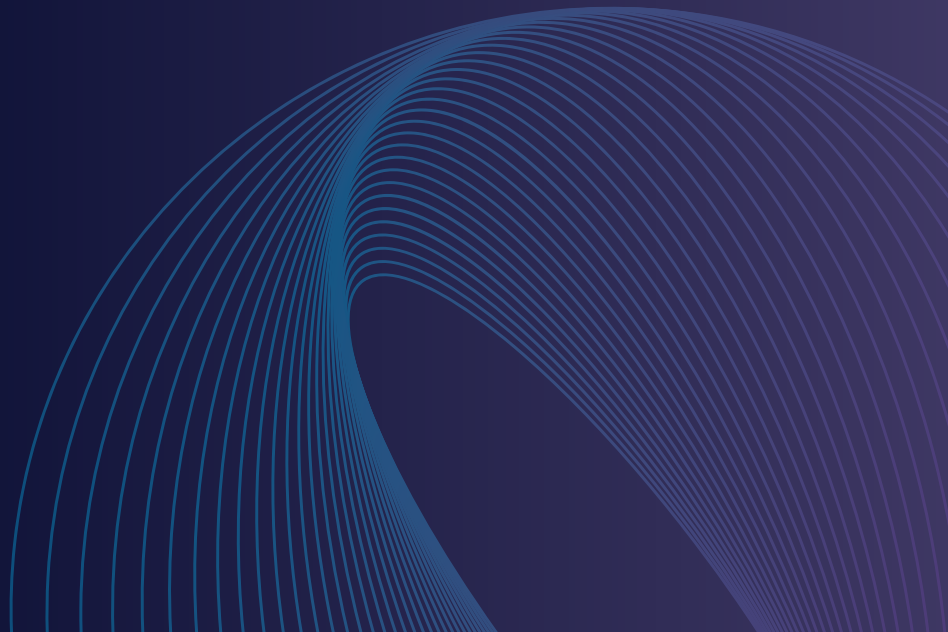
Don't forget about the technology and support considerations for in-person events. Think network security, internet and WiFi connectivity, as well as the availability of onsite technical support staff.



Cliftons holistic approach to project management and event logistics takes in every step of the process. From identifying the target audience and developing event concepts, organising every detail and managing budgets, through to post-event wrap-up and reporting. Whether your event is in-person, virtual or hybrid, we can take the same structured approach to managing your event, ensuring no detail is missed.



THERE ARE SOME KEY CHALLENGES TO ALL EVENTS. THE RIGHT EVENT MANAGEMENT APPROACH CAN HELP TO STREAMLINE THESE CHALLENGES AND ENSURE YOU'RE COVERING ALL THE BASES.



## BUDGETING

Budgeting and financial management is one of the most difficult and time-consuming tasks for event management. Comparing packages between suppliers (in particular the variations between all-inclusive rates in contrast with a base rate with add-ons), travel, accommodation, technology costs for live-streaming – it all adds up.

As businesses look to manage costs in a post-COVID world, robust financial management for event managers is more important than ever. Assessing the cost differences – and the projected ROI – between in-person, hybrid and virtual events is also important.

When looking for an event management solution, finding a platform that can help you to keep track of costs, produce regular reports as you go comparing budget to actuals, and project the final event cost can be a big timesaver. Instead of having to work with your finance team, a platform that allows you to manage event budget and financials within your own system can streamline your processes.



## PLANNING

Venue selection, IT requirements, catering, speaker coordination, sponsors and exhibitors management, and the list goes on.

There are so many moving parts to most events, even the simplest. Start planning an event with any degree of complexity and you quickly realise that robust systems and processes are an essential.

Before engaging with any event management service ensure you have

access to a dedicated project manager, a single point of contact to be across every element of your event and work with our broader team and suppliers on your behalf.

In addition, having access to event management software is critical to a successful event. Ensure the platform can be adapted to your unique needs, with functionality for all aspects of event registration and delegate management, as well as tools for centralising exhibitor and sponsor communication.

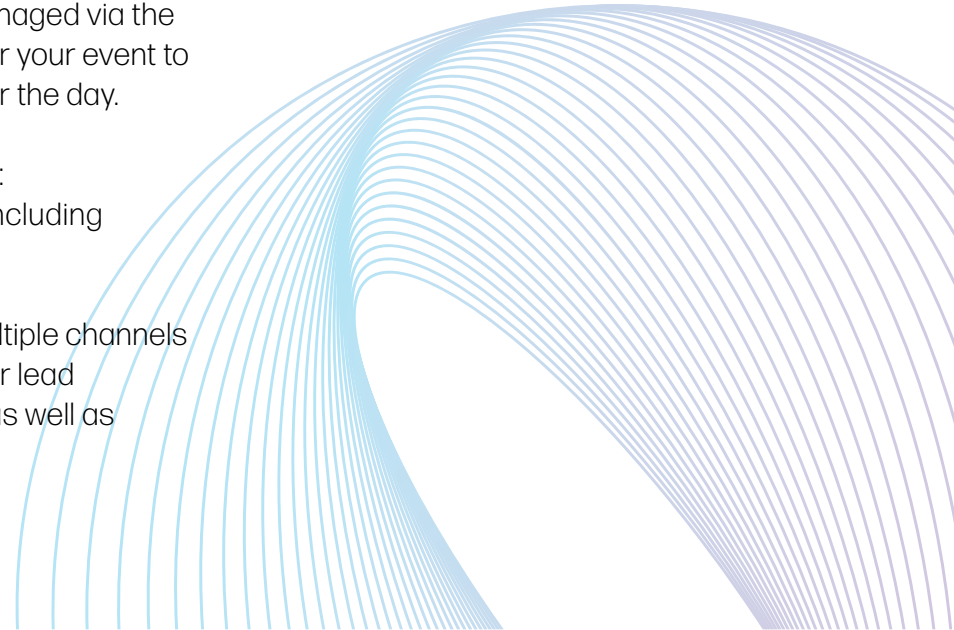


## MARKETING

There's no point in planning an event if no-one knows about it. A strong communications and marketing plan is essential to the success of any event. As well as promoting the event in advance, a strong marketing plan should also consider how to communicate details of the event on the day, as well as ways to repurpose event content.

With capabilities for event recording and on-demand playback, all centrally managed via the one platform, you can find ways for your event to continue delivering value long after the day.

Look for an approach that lets you:

- Coordinate email marketing, including audience segmentation
  - Schedule social media posts
  - Repurpose content across multiple channels
  - Provide data collection tools for lead generation for your business, as well as sponsors and exhibitors
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## EXECUTION

In today's world, where events are frequently bringing together advanced audio-visual elements, including remote presentations, pre-recorded content, live streaming to virtual audiences, there's a lot to keep track of.

Choosing the right event management platform can help to streamline this process. For example, using our software platform, you can:

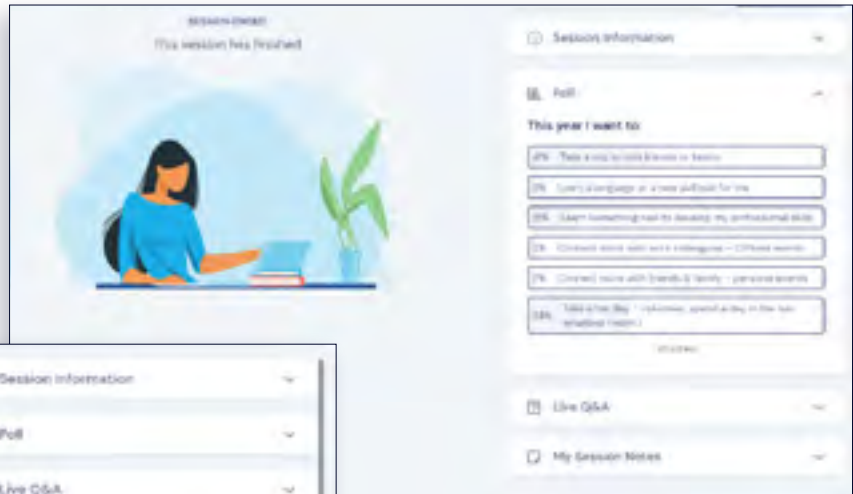
- Store all pre-recorded presentations
- Centrally manage virtual presentations
- Run concurrent workshops
- Host an exhibitor hall and manage all

sponsor engagement

- Access check-in functionality including mobile apps and self-service kiosks
- Live stream the event to remote attendees across multiple locations
- Record presentations for on-demand playback.

Of course, having the right people on hand can make a big difference too.

An experienced team who knows the details to pay attention to – and how to troubleshoot quickly if something goes wrong – can help



## ENGAGEMENT

The best events have a high degree of audience engagement and participation. That's where the magic happens. A lot of people think this can only come from in-person events, but nothing could be further from the truth.

With the right platform, hybrid and virtual events can bring people together in ways that couldn't have been imagined just a few years ago. For example, a robust event management platform can help you to:

- Manage virtual breakout rooms and networking sessions
- Manage live polls, Q&A sessions and discussion forums
- Stream social media posts
- Host small group workshops
- Provide tools for lead generation for sponsors and exhibitors.



## REPORTING & ROI

In today's world, it's essential that your event is delivering on your business objectives. Access to robust reporting tools is critical to measuring your event's value and return on investment (ROI). For example, when you provide quantifiable results to your stakeholders and sponsors. Or when justifying your event budget.

Look for tools that offer the following:

- Attendee feedback management
- Attendance reports and engagement statistics
- Post-event communication results, including the number of video playbacks, click-through rates and more
- Financial reporting and analysis.

Depending on your organisational needs and event objectives, reports can create opportunities for meaningful conversations about the event and the next steps.

## OUR EVENT MANAGEMENT PROCESS

Whether your event is in-person, hybrid or fully virtual, we work through a structured process to define your event goals and ensure every aspect is managed. Here's how it works:

### 1 DEFINE GOALS:

We'll go through your reasons for holding an event and what you need to achieve. This includes defining why people will want to attend and determining what the metrics for success will be.

### 2 UNDERSTAND YOUR AUDIENCE:

We'll go deep on who your audience is, their role, the kind of people they are and more so that we can tailor the event plan to create something they'll really engage with.

### 3 DETERMINE THE EVENT FORMAT:

Do you want lots of presentations, or breakout groups with a focus on workshops? Do you want lectures or interactivity?

### 4 SCOPE VENUE AND TECH REQUIREMENTS:

Whether in-person or hybrid, your event will shape the venue choice. As well as our network of venues, we source other venues to tailor the event to your requirements. Similarly, if your virtual or hybrid event is prerecorded or live-streamed (or a mix), this too will influence venue recommendations. We offer expert strategic guidance and full technical support for your AV and production needs. Look for a team who can integrate in-venue and digital elements for a smooth, holistic event.

### 5 CREATE THE CONTENT:

As well as support creating presentations, including pre-recorded presentations, we can also help with developing marketing materials, event logos, banners and more.

### 6 CONSIDER MONETISATION:

If your event is ticketed, we can help with suggested pricing and provide a platform for online ticket sales. In addition, sponsorship opportunities may also be relevant for your event, with options for tools like virtual sponsor booths and options for sponsors to connect with attendees.

### 7 EVENT PROMOTION:

Promoting your event with newsletters, blog posts and social media is critical in today's crowded market. Our team can provide as much or as little marketing support as you need.

## EVENT MANAGEMENT AND CORPORATE ENVIRONMENTAL RESPONSIBILITY

In today's world, it's important to think about the environmental footprint of your event. For example, can you really justify flying executives across the globe for in-person team meetings when virtual and hybrid event formats have been proven to be effective and still have collaboration and interactivity functionality?

The carbon footprint of virtual and hybrid events is a fraction of an in-person event if there's significant travel involved - especially if the meeting or conference is the only reason for the trip. Over the past two years, the business community has successfully proven that face-to-face is wonderful, and we've missed it, but it's certainly

not essential for networking, training, collaboration or relationship building. Saving face-to-face events, particularly when travel is required, for when they're really needed can have a big impact on your business's environmental goals.

Also consider the impact of catering for your event on the environment. Food waste can be a major issue (although, at Cliftons, we have contingency measures in place to minimise food waste at our in-venue events), as can be single-use plastic items. Work with your event management team to consider what sustainable options are viable and what compromises need to be made.



## EVENT TEAM

## ROLE

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### **Project Manager**

Your event co-pilot, managing all the details from your initial briefing and event prep, through to post-event reporting.

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### **Production Manager**

Your on-the-day point person/event concierge, running the studio and coordinating all presenters

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### **Broadcast Operator**

Your on-site tech sidekick for recording or streaming all your visual and audio. They'll also work with remote presenters to make sure everything seamlessly coordinates.

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### **Technical Specialist**

An extra set of hands for complex video or audio presentation requirements.

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### **Marketing Specialist / Graphic Designer**

Marketing support, such as copywriting services, and design for integrated visual styling that supports your brand and corporate style guide.

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## DON'T FORGET SECURITY

Security is an essential consideration for all events and a good event management system is a secure event management system.

If you're centrally managing registrations, you need a payment gateway that can securely store and manage credit card data. Of course, meeting data compliance regulations for people's personal information is also critical.

Not to mention, the secure storage of presentations, especially if you are dealing with commercially sensitive information. card information.

**Our platform is highly secure and is trusted by multi-national corporations, professional conference organisers, government departments and tertiary institutions in more than 50 countries around the world.**

**We offer a guaranteed 99.95% uptime, your own dedicated database, multiple layers of security, and PCI Level 1 version 3.2 compliance across data and credit**

# HOW DOES ALL OF THIS LOOK WHEN PUT TOGETHER

Be inspired. Take a look at these examples of interactive and seamless events.

**CLIFTONS CASE STUDY**  
**A year-long program of virtual conferences**  
 Cliftons supports New Zealand's Ministry of Foreign Affairs and Trade to deliver a year of events for the Asia-Pacific Economic Cooperation forum



**The Situation**  
 In 2020 for the first time ever, the Asia-Pacific Economic Cooperation (APEC) forum was delivered in a virtual format. Bringing together officials, ministers and leaders from across the Asia-Pacific region, the event aims to create greater prosperity by promoting growth and addressing regional economic challenges.

**The Solution**  
 To ensure the success of such a significant program, virtual conferences were essential. Cliftons worked with the Ministry of Foreign Affairs and Trade (MFAT) to find a way to deliver the event in the face of COVID-19 restrictions, with high quality presentations made to maximize connectivity. APEC virtual events (APECv) was designed to deliver a series of virtual events from the summer of 2020.

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**CLIFTONS CASE STUDY**  
**Seamless multi-city experience**  
 Cliftons delivers a seamless multi-city experience for Norman Dewey & Young



**The Situation**  
 The NZD team had invited high-profile foreign investors to present at the international summit they hosted in their country. The plan was to host an event at all six of their three Wellington locations, with the event held in each city and the event guests in Sydney and Melbourne. With a total of 1000 participants, speakers, exhibitors and hybrid participants, it was in the same room as to as that would be possible.

**NDY**  
 A Norman Dewey & Young company

**The Solution**  
 Cliftons recommended using a hybrid online program for each of the international locations. This allowed for seamless connectivity and hybrid participants, with a seamless transition between the two cities. Cliftons worked with NDY to ensure that the event was a success, with a seamless transition between the two cities.



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**CLIFTONS CASE STUDY**  
**Creating a big conference impact both in-person and online**  
 Showcasing the potential of hybrid conferences



**The Situation**  
 The COVID-19 pandemic has necessitated a change in the way most business events happen. International travel was largely off the table for many of 2020 and 2021, meaning a shift in 2021. The event had to cater for businesses to connect and share ideas and while virtual meetings have proven effective and helpful, there's nothing like being in the room when possible and doing it from the comfort of home.

**The Solution**  
 By using a hybrid approach, Cliftons was able to cater for a mix of in-person and virtual attendees. The event was held in a hybrid format, with a mix of in-person and virtual attendees. Cliftons worked with the client to ensure that the event was a success, with a seamless transition between the two cities.

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