

Phase 1 – Problem Understanding & Industry Analysis

Objective

The objective of this phase is to understand the requirements and challenges related to event management in order to define the scope of the EventConnect CRM Salesforce project. Based on research through Salesforce documentation, industry reports, and case studies, a solution has been designed to automate event registration, communication, and reporting while improving user experience and efficiency.

1. Requirement Gathering

Researched event management processes across industries such as conferences, webinars, and workshops.

Identified common challenges such as registration delays, inconsistent data, and communication gaps.

Analyzed Salesforce tools like Process Builder, Flow Builder, and reporting functionalities to address these challenges.

Functional Requirements

Automated lead capture from registration forms and marketing campaigns.

Tracking of attendee registration, participation, and communication history.

Seamless communication through email templates, SMS alerts, and notifications.

Feedback collection for event improvement.

Non-Functional Requirements

Secure storage of attendee and sponsor data using Salesforce's encryption and access control features.

Scalability to handle large events.

Optimized performance for real-time data handling and smooth user experience.

2. Stakeholder Analysis

The following stakeholder groups were identified based on research and Salesforce's use cases:

Identified Stakeholders

Event Planners – manage event schedules, sessions, and logistics through Salesforce's objects and automation tools.

Marketing Teams – handle promotions, lead generation, and attendee communication using Salesforce's campaign and automation features.

Sponsors – track performance metrics and ROI using dashboards and reports.

Attendees – need an easy registration process and timely updates.

Key Challenges Identified

Managing registration data manually leads to errors and duplication.

Communication with attendees is often delayed and inconsistent.

Sponsors need accurate reports for decision-making and investment tracking.

Example

Event planners need efficient tools to manage event schedules and ensure that attendees are informed about sessions and updates in real time.

3. Business Process Mapping

Mapped Workflows

1. Lead generation through web forms and marketing campaigns.
2. Event registration with automated validation and workflows.

3. Scheduling of events, sessions, and speakers using Salesforce custom objects.
4. Attendee communication using automated alerts, emails, and notifications.
5. Feedback collection after the event through surveys.
6. Reporting and follow-ups using dashboards and analytics.

Automation Opportunities Identified

Auto-assigning leads to appropriate teams based on location or interest.

Automated confirmation and reminder emails.

Triggered feedback requests post-event using Salesforce Flow Builder.

Example

A lead submitted via a web form is automatically assigned to a local event planner. An email confirmation is sent immediately, followed by reminders as the event approaches.

4. Industry-specific Use Case Analysis

Challenges Identified

Registration data collected from multiple sources leading to inconsistencies.

Lack of personalized communication reducing attendee engagement.

Difficulty tracking attendance and feedback in real time.

Sponsors lacking accurate analytics to measure event impact.

Solutions Using Salesforce

Implementing validation rules and duplicate management to ensure data accuracy.

Creating personalized communication workflows using automation tools.

Building dashboards for attendance tracking and feedback analysis.

Integrating third-party tools for surveys and advanced reporting.

Example

A global conference receives registrations from websites, social media ads, and partner networks. Using Salesforce, all data is unified and attendees are segmented for personalized communication.

5. AppExchange Exploration

Tools Explored

Eventbrite – For ticketing and registration management.

SurveyMonkey – For collecting attendee feedback.

Mailchimp – For marketing automation and communication.

Tableau CRM – For advanced analytics and dashboards.

Evaluation Parameters

Integration compatibility with Salesforce.

Availability of event management features.

Licensing cost and scalability for large events.

Recommendations

Integrate Eventbrite to streamline registration and ticketing.

Use SurveyMonkey for post-event feedback collection.

Implement Mailchimp for automated campaigns and notifications.

Use Tableau CRM for real-time analytics and decision-making.

Example

Event organizers can use Eventbrite's Salesforce integration to register attendees directly within Salesforce and send automated confirmations without manual effort.

Summary

This phase involved researching industry practices, analyzing stakeholder requirements, and exploring Salesforce's capabilities to build an efficient event management solution. Business processes were mapped, automation opportunities were identified, and AppExchange tools were evaluated to enhance the CRM system. The outcome of this phase provides a strong foundation to implement EventConnect CRM using Salesforce, ensuring that the solution is secure, scalable, and aligned with real-world event management needs.