

Background Report

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Client Mission and Services

Client is the department of the University that is generally responsible for helping clients host events in University spaces. They are responsible for managing various events, conferences, and Summer programs that take place in the University Unions and in/on various other University properties, such as dorms. These events can be anything from meetings, to weddings, to Summer camps. Depending on the event, they can be responsible for managing the space, planning the event, and providing catering.

Client Problem

We have been asked by Client to examine how they currently use their software to organize and maintain data on all of the events they are responsible for, and help them use it more effectively. They currently use three different software programs, because each one can keep track of a slightly different set of things. One of them can't be used for anything with a menu because it can't connect to nutritional information. One of them allows clients to add attendees and update dietary restrictions. Ideally Client would like to be able to use just one software system that can meet all of their needs for every event, but in the case that that's not possible they would like us to determine how they can use their existing software better. Overall they want to either find a way to reduce the number of programs they use, or find more efficient ways for them to use the software they have.

Questions

1. Are there existing software programs that can meet all of our client's needs?
2. Is there an existing software program that can replace at least two of the ones our client currently uses?

Client Current Software

Right now, our client primarily uses three software programs to manage their various events. While each program has features that overlap with the others, they each also have one or two features that the other two do not, which is why all of them are necessary for Client right now. Our task is to either find a new program which can replace two or more of the existing ones, or to figure out how to use the functionality of one of the current programs to replace another. Hence, it is useful to get a basic understanding of each of the currently employed programs before proceeding.

Event Management Systems (EMS) is the first program we'll examine. EMS is the most central piece of software that Client uses. It's used for many of the logistical portions of organizing an event, such as reserving rooms, billing providers, inviting attendees, scheduling, etc. (EMS Software, n.d.). It also has some analytics built in to examine things like room usage and group/meeting analysis, but these are things that aren't as important to Client's needs. It has integration with Microsoft Outlook, and it also allows for customers to create custom integrations with their API (EMS Software, n.d.). Right now Dining Services is actually using the custom integration feature to link EMS to Eventmaster.

Conference Programmer is similar to EMS, but has less functionality overall. It's mostly used for registration purposes, and the biggest reason that Client uses it is because it integrates with Iris Registration. Iris Registration is important for Client because it gives their clients a portal which allows the client to manage some of their event personally (Iris Registration, n.d.). The clients have all of the necessary access to the data they need, and can adjust things like attendees and dietary restrictions. This is helpful when clients want to plan more of the event and have Client in more of a supporting role, but for events where Client is completely in charge of planning, Conference Programmer isn't really necessary.

The last major piece of software that Client uses is Eventmaster. Much like Conference Programmer, Eventmaster is similar to EMS. It's mostly used for organizing the logistics of events, and focuses on things like advertising the event with a custom page, a customer portal for customers to manage their tickets, and it can also process orders (Eventmaster, n.d.). Client uses Eventmaster when they have to cater events, because Eventmaster has built in support for Dining Services to upload menus and add nutritional information. For any catered event, it's the only system Client has which can get all of that necessary data from Dining Services.

Event Management Software Alternatives

As it turns out, the market for various kinds of event management software is pretty large, and there are many options to turn to. Some of them focus primarily on managing only the digital aspects of the event, such as ticket sales and Facebook events, while others have more holistic features for things like reserving space and catering. Due to the large number of factors to take into consideration, I am going to be using information pulled from Capterra, a website meant to help businesses find software to suit their needs (Capterra, n.d.). It tracks a large amount of

programs that fall into various categories (applicant tracking, LMS, maintenance, etc.) and they have a built in comparison tool. I was able to filter the list of all programs on Capterra by the event management features EMS has, and used the top 3 results (by user ratings) in Capterra's built in comparison tool to compare the results to EMS.

The top result of my search was dapulse. dapulse is a project management tool that prioritizes visualization to communicate information (dapulse, n.d.). It excels at letting people see exactly where a project stands, how much time is left on certain tasks, and who is taking care of what. It can be installed on any computer (PC or Mac) and is supported on both Android and iPhone, making it easy for everyone to stay on top of their work no matter what devices they have. While it appears to be very clean and easy to use, it seems to be most useful as a kind of project management tool, so it probably doesn't have as much functionality as Client needs.

The next result I found was Arlo Event Management Software. According to their website, "It's a cloud-based event management system for selling and delivering physical and online events" (Capterra, n.d.) and it has a lot of integration potential. It connects with Microsoft Outlook, automatically updates your website when changes to things like the calendar are made, and can work with an existing CRM (customer relationship management) software (Arlo, n.d.). Or if you don't already use a CRM software, it has its own CRM software functionality built in so that you don't need anything additional. It's a very powerful system that seems able to easily take care of most of Client's needs for planning events.

Last but not least is Eventleaf. Eventleaf lets you create event websites, and can manage things like ticket sales and registration (Eventleaf, n.d.). It's very oriented on managing the digital aspects of events, and less on organizing the behind the scenes things like scheduling tasks for employees. While it seems to have a more narrow scope than some of the other event management software I've looked at, it also has a lot of customer support to help figure things out. Additionally, as far as the list of event management features on Capterra goes, it has every feature listed, and every other program I've examined is at least one feature short of having them all, so it may have more functionality than I can research without using it myself.

Out of the three event management software programs I've examined, I believe that Arlo has the most potential to replace any of Client's current programs. It has more support for organizing physical events than dapulse or Eventleaf, and has support for integrating with various other programs and websites. This would make it easier to adapt to how Client needs to use it. It also has a large amount of online support and resources for training, which would make changing to use it easier for Client employees. It also has CRM software built in, which is something else Client has asked us to look into, and it can also integrate with other existing CRM programs. This leaves a lot of potential for Arlo to meet several of our Client's needs. The big question is whether Arlo has enough functionality to replace more than one of Client's programs.

Customer Relationship Management (CRM) Software

In addition to general event management software, our client has asked us to look into CRM software as a way to possibly help them with their existing programs. CRM software can do a lot of things depending on the program, but is primarily used to help businesses keep track of the data related to their customers. This includes things like contacts, sales, marketing, and more. Depending on the program, CRM software usually does a lot more, and will probably have some of the same functionality as some event management programs, so my goal when researching CRM software is to find something that can either do a lot of things that event management software can't, or to find an event management program that has all of the same functionality of most CRM software.

I also used Capterra to look into CRM software. I used a method similar to what I did for comparing event management software, but I didn't have to compare things to a given program, so I just sorted CRM software by highest ratings. This led me to the three highest rated CRM programs by user rating. The rest of this section will be dedicated to analyzing these programs and how useful they may be to Client.

The first CRM program that came up was Marketing 360. As the name suggests, it does more than just CRM, it is primarily a marketing tool. However, they do have a fully developed CRM section of their program as well, so that's what I focused on when researching them. The CRM tool has a lot of really convenient features for managing contacts. There are a lot of fields that can be kept track of for each contact, but only filled out fields will show up on their profile (Marketing 360, n.d.). There are also sections to manage projects (projects can be renamed) that you're working on with different customers, and for managing email lists. It's also possible to set up automatic emails to different lists for things like weekly updates. While it seems overwhelming, there are a lot of useful features, and you can ask for help from a live Marketing 360 representative at any point. The website advertises itself as being great for small businesses, but I don't see why Client wouldn't be able to use it as well.

Right below Marketing 360 was Less Annoying CRM. It's a pretty standard CRM program, although it focuses on being useful for small business and prides itself on having good customer service (Less Annoying CRM, n.d.). Most of the functionality listed on their website seems very similar to what I've come to expect from most event management software that I've seen, but they focus much more heavily on managing contacts. A contact can be either an individual or a company, and individuals can be linked to companies. You can also import contacts directly from Google or a spreadsheet. Less Annoying CRM is a good tool if all you want to do is manage a list of contacts, but beyond that it doesn't offer much more than what any event management software does.

The last CRM software I looked at was Streak. Streak is really unique because it's not a standalone program. Unlike all the other software I've examined so far, Streak is an extension for Gmail. Streak's mission statement is "Run your entire business from your inbox." (Streak, n.d.). Using Gmail as a base has several conveniences. It automatically works with Google apps, is based in the cloud, and there's an API that you can use to help develop custom tools. While it doesn't seem to have as many features as other CRM software, there's something to be

said for how easy it is to integrate into an already developed system that makes it worth looking at.

Client asked us to look into CRM software to see if it might be something they can use to help with their original problem of using too many programs. From what I've looked at, I don't think that CRM software is something that will really help Client solve the problem they came to us for. It does seem useful in general, but Client already has a system to help them manage their customers and more, so I don't think CRM software would introduce so much more functionality that they could reduce the total number of programs they use.

Conclusions Drawn From Market Research

After researching some of the existing solutions on the market for managing events, I believe that I've discovered some useful information. First off, CRM software probably won't help Client with the problem they came to us about. Most of the software they use likely already has the functionality to help them manage their customer's data, and CRM software doesn't seem to do much more than that in most cases. I even found some products (such as Marketing 360) where CRM wasn't the focus of their product, but they include CRM software as an additional feature. This is also the case for some of the event management software I found, which is more relevant to the work Client does, so it makes more sense to look at event management software for a solution rather than CRM software.

Overall, I think that the most useful result from my research is that I think it's best to look further into a replacement event management software for Client. According to Capterra, EMS doesn't actually have a lot of features compared to some of the alternatives available, and it's quite expensive by comparison. As mentioned earlier, I think Arlo is the most worthwhile alternative to look into at this point, as it seems to meet all of the same needs as EMS and more. According to Capterra it supports catering, and if it can do so in a way that removes the need to use Eventmaster to get data from Dining Services, then Arlo could potentially replace EMS and Eventmaster. While this would be ideal, it's hard to know from research how practical this switch is, and it's possible that Arlo can't provide the same services that Eventmaster can when it comes to catering, but if it can then it's certainly worth looking into.

Even if none of the event management software I looked into is something that can help Client, I still think that a new one has the most potential to help Client find a solution they can be happy with. It seems unlikely that any of the programs they currently use can fully replace another due to the specific reasons each of them are used, although our interviews and observations may help us find something no one else has yet. I think it's more likely that there's a more cohesive program than EMS that can possibly take over for both EMS and either Conference Programmer or Eventmaster though. The market has a lot of options, and while it's hard to thoroughly investigate all of them, I think it's the most likely way for Client to reduce the number of programs they use. The other alternatives that we've discussed just seem too narrow in scope to be able to cover all of the functionality that Client needs.

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