

# Event Management for Infor CRM

Collier Pickard's Event Management for Infor CRM is a seamless extension to the core Infor CRM capability. Manage any type of event from start to finish, all from within your Infor CRM system.



## Introduction

If your business regularly runs events such as seminars, training courses and meetings, then Collier Pickard's Event Management tool for Infor CRM can help you run these events efficiently. It allows you to track everything you need – including accommodation, dietary requirements, outstanding payments, attendee lists and much, much more.



## Managing events efficiently and effectively

A good CRM system will provide you with a 360° view of your prospects and customers. This means having a thorough understanding of your relationship with people you do business with – whether it's interactions that took place in the past, current activities or any future dealings you may have with them.

Managing events is no different – it forms part of the wider CRM need. Who will you invite to your breakfast seminar? How many people do you

need to chase up for answers about whether or not they're attending your new product launch? Do you have all the necessary details in order to make the event run smoothly? The need to track all activities related to your event becomes even more pertinent if you want it to be a success.

So what types of events can you manage with this tool? The answer is it can be almost anything – from small breakfast meetings to large seminars, or even training courses. It allows

these events to be associated to people you know, giving visibility of who has attended your events, who was invited but didn't show up, and perhaps most importantly, who hasn't paid!

Collier Pickard's Event Management for Infor CRM is designed to allow easy management of corporate events – whilst retaining the all-important CRM best practice of data visibility; having a 360° view of your delegates.

## Key functionality

- Profile your clients in Infor CRM to determine the most suitable delegate list for upcoming events, and attach them to an event as invitees
- Intuitive user-interface—add contacts to events directly from the contact view
- Quickly and easily review event history directly from the contact view
- Waiting list functionality ensures events are never over-subscribed
- Administer user-rights for marketing, sales, management etc.
- Multi currency and multi-rate support
- Efficient attendee, invitee and accommodation management
- Track payment and any price overrides
- Allowance of multiple spaces per attendee for guests
- Flexible per-unit charging options e.g. per hour, half-day, full-day etc.
- Easy mail merge to a single person or all attendees

Manage invitees and attendees at a glance. By knowing everyone's statuses, you can swiftly assign tasks, campaigns and other follow up activities to ensure your event gets fully booked.

**Events - Infor CRM Administrator Training Course**

Q Lookup Results All Events Closed Events My Events My Region My Tasks On-Hold Open

Event Details

Event Name: Infor CRM Administrator Training Course Status: Being Planned

Start Date: 24/10/2016 09:00 Duration: 1 Type: Training

End Date: 27/10/2016 17:00 Location: London Office Room: Board Room

Places: Min: 2 Max: 8

Organiser: Gross, Eva

Organiser Email: eva.gross@collierpickard.co.uk

Description: Training course on how to administer Infor CRM including best practice and tips

drag a tab here to show it in this area

Extended details Instructor/Host Rates **Tasks** Attendees Waiting List Attachment **Reports** More Tabs Invitees

**Event Snapshot** Copy Event

**Attendee Status (25)**

- 23 Attended
- 1 Cancelled
- 1 Confirmation sent
- 1 No show

**Invite Status (2475)**

- 2475 Sent Invite

**Wait Status (0)**

Maximise success rates by running reports on past events to analyse revenue, attendee numbers, discounts, and much more. Plan ahead with reports on upcoming events to forecast revenue.

This quarter's top 5 events by Revenue

View Group 10/19/2016, 4:43 PM

Manage tasks efficiently, such as sending out agendas or printing name badges, all from within your Infor CRM system.

**Tasks** More Tabs

Order	Stage	Description	DueBy	Completed	
1	Before the course	Ensure agendas are created and distributed	29/09/2016 00:00:05		Edit Delete
2	Post Course	Collect feedback from delegates	29/09/2016 00:00:05		Edit Delete

## Further information

Get in touch today for more information about Collier Pickard's Event Management for Infor CRM and we'd be happy to discuss your needs.

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