



DUCHARME, MCMILLEN & ASSOCIATES, INC.

Extending marketing reach by accelerating virtual event strategies.

6

virtual events in one month

4x

attendance for virtual event

90%

average cost savings per
virtual event

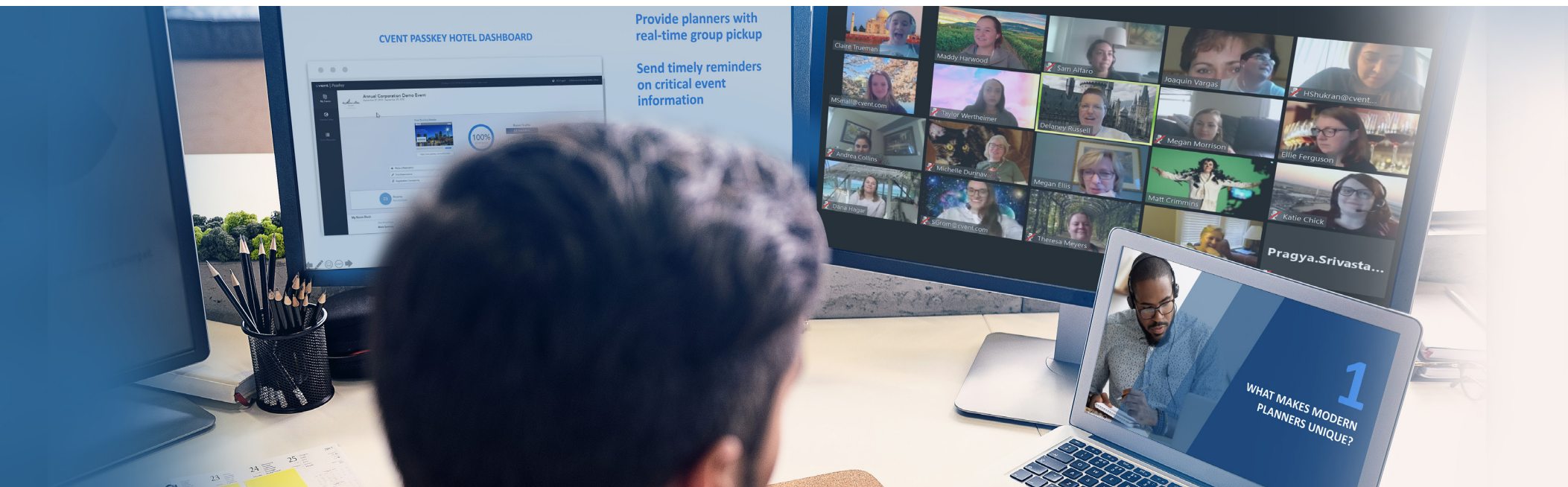
DuCharme, McMillen & Associates (DMA) assists companies with minimizing their taxes, enhancing the efficiency of their tax administration through industry-leading technology solutions, and managing their tax compliance obligations. DMA hosts between ten and twenty large events across the US and Canada annually, as well as fifty roundtables and a series of one-on-one meetings for their business development team.

Navigating New Virtual Event Marketing Strategies

Lori Wildman, Senior Marketing Manager, and Michele Gebrayel, Corporate Event Manager, had to quickly assess the state of their 2020 event strategy in the early weeks of the global pandemic. As in-person events came to a halt, they needed to balance canceling events with the opportunity to go virtual. “We had about five events in the works, and as we started canceling them, we realized there was going to be a huge void,” Michele explains.

They decided to transition a series of existing roundtable events to a virtual experience using Cvent’s Event Marketing and Management tool and a Zoom integration. As the first was meant to be an in-person lunch event, they provided attendees with a restaurant gift card to instead facilitate a virtual luncheon experience. The concept was a hit with attendees, increasing engagement while providing additional incentive for the clients to attend.

Lori and Michele saw additional opportunities to increase DMA’s marketing reach in going virtual. Though they typically limit in-person roundtables to twenty people, the virtual environment supports a broader audience capacity. Using the registration data already housed in Cvent, they were able to retarget invitees who had previously declined due to travel restrictions. They used Cvent’s email functionality to update event invitations with the virtual registration link and new messaging. “We did the retargeting right inside the Cvent tool,” says Lori. “What we don’t want to do when we’re pivoting from live to virtual is add more steps outside of Cvent



unless you absolutely have to. Our goal is to be as streamlined and automated as possible.” The seamless process allowed DMA to communicate new event details to attendees in a matter of minutes.

They also opted to track registration through Cvent rather than rely on the virtual platform’s registration functionality. Lori explains, “Cvent is our main source of data, and we’re keeping the marketing process really the same as it was with live events.” By housing all data in a single location, DMA can maintain their existing workflow between Cvent and Salesforce. “Using that Salesforce integration, we’re pushing over the campaign status as far as emails opened, registration, and so forth,” Lori adds. This automated data flow helps maintain program momentum while providing real-time visibility into event performance. Lori explains, “All of those great metrics that Cvent provides in the backend and reporting are still there. Everything is the same; it’s just showing up virtually instead of in-person.” These data points help reinforce the value of virtual events as a key aspect of the organization’s larger marketing strategy, even during the challenges of the global health crisis.

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- Lori Wildman, Senior Marketing Manager



Evolving Events During Times of Crisis

By streamlining the internal processes associated with virtual events, Lori and Michele can adapt their event strategy to keep pace with the changing global climate. Using the Event Marketing and Management tool, Michele can easily duplicate and edit existing templates as needed. She notes, “I do appreciate how easy it is to copy an event in Cvent. I can hide some information, in case we do go back to live, and update the content as the event gets updated.” By leveraging pre-built email and event templates suited to both live and virtual environments, Michele can efficiently market to invitees without spending hours on manual builds. “I can copy, edit, and quickly rename them so I have multiple choices when it comes to executing quickly,” she adds. The user-friendly process also ensures consistent branding across events.

Though the circumstances surrounding their move to virtual were challenging, Lori sees unexpected value in the pivot to virtual. “This is a way of reaching our clients and prospects that we may not have previously had,” she says. They are now tracking significant upwards trends in registration and attendance. “We’re casting a wider net now that we’re able to have virtual events. We’re able to have people join who would normally not be able to make a trip for an all-day event,” says Michele. For one recent regional event, DMA leveraged Zoom’s virtual meeting room functionality to create interactive sessions within the framework of the larger event. They saw a clear uptick in registrations by incorporating discussion-based content and networking opportunities into the agenda, as well as extending their marketing reach. The in-person event generally averages ten people, whereas the virtual event saw over sixty registrations. This ultimately resulted in attendance that was four times larger than expected.

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- Michele Gebrayel, Corporate Event Manager



Maximizing the Value of Virtual Events

With several successful virtual events completed, Lori and Michele are actively strategizing the best path forward. “We’ve got six virtual events in the pipeline with the potential to do several more as the requests keep coming in,” explains Michele. Their leadership also sees the value of virtual as a means of engaging with clients and prospects. “As our staff is becoming more familiar with the tools, we need to keep things active in the pipeline for our sales team,” she adds. “We need to make sure business carries on, so when it’s possible to go virtual you absolutely should in order to keep the momentum going.”

Having seen the value of virtual meetings and events long before the global pandemic, Lori believes virtual should always be included as a viable option in any organization’s program mix. Not only do virtual events extend the marketing reach to both clients and prospects, but they provide valuable cost savings for the organization. “The financial impact on the company is so much smaller than with an in-person event, so it’s a nice way to supplement and broaden our net without adding a lot to the bottom line in terms of cost,” Lori says. Her team averages roughly 90% cost savings per virtual event by eliminating spend for venue costs, travel, food and beverage, and much more. “In terms of cost savings, it’s huge. The max we’re paying is 10% of what we were paying before,” she explains.

The Future of Events at DuCharme, McMillen & Associates

While digital platforms provides immense value in terms of cost savings and marketing reach, Lori and Michele insist virtual events are only one part of a successful corporate event strategy. “I wouldn’t want people to think they should just do all their events virtual,” advises Lori. “You’re missing out on

the relational aspect of an in-person event. So think of virtual events as a supplement, not a replacement. It’s another tool in your tool belt to help get those prospects down the funnel.” She adds that enabling the sales function with the tools they need to be successful in a virtual environment is key to executing a successful virtual strategy. Aligning marketing and sales goals allows account managers to maintain their relationships with clients while reinforcing the power of the event marketing function to drive virtual leads. She recommends utilizing the wealth of resources and best practices found in the Cvent Community and other online resources to support the sales process. “There’s so much great information in the Community and the help articles are immensely valuable,” she explains.

Having been a longtime proponent of virtual events, Lori views this new normal as a way to broaden the impact of the organization. “We definitely see virtual events as an addition to our event mix and our marketing mix overall,” she says. Moving forward, she believes integrating DMA’s virtual event strategy within their larger event portfolio will present invaluable opportunities for the organization. She says, “Virtual events are absolutely an additional tool in your tool belt that we will continue to use beyond COVID-19.”



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Cvent is the global meeting, event, travel, and hospitality technology leader.

Cvent provides easy-to-use, integrated technology solutions to maximize the impact of meetings and events of all sizes.

We help organizations plan and market events, execute onsite, engage audiences, and measure and analyze results.

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