



## Supporting the Virtual Event Platform Ecosystem with Cvent solutions

**300,000**

global registrations  
managed with Cvent

**6,000+**

annual events

**5,000**

person virtual event  
managed with  
Attendee Hub

YPO is a global leadership community consisting of 30,000 chief executives across more than 142 countries. YPO brings the value of member-to-member connection to their executive members through over 6,000 annual events at the chapter, regional, and global levels. “The focus of YPO is to empower our members to become better leaders using the power of events, connections, and peer-to-peer learning,” explains Mandy Affleck, Event Platform Specialist.



## Navigating the New Event Landscape with Cvent

When the global health crisis effectively halted in-person events in early 2020, the YPO team knew their members would be directly impacted. “For our members, face-to-face events have consistently been one of the top five value drivers of YPO membership,” says Tanya Nieto-Winzey, Event Platform Manager. She explains that a complete lack of events would significantly impact their member offerings. Moreover, membership renewals were scheduled to start in June of that year, creating concern that the organization would see a drop in member retention. Lastly, YPO understood the vital importance of maintaining key program offerings for their executive members around the world who needed guidance as they navigated uncharted territory throughout the pandemic.

With these concerns in mind, the YPO team reevaluated their existing portfolio and overall strategy to meet rapidly changing member needs. “We decided to quickly implement three priorities at YPO,” explains Tanya. “One was to unleash the power of the networks virtually, the second was to really improve the technology to deliver the peer-to-peer



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– Mandy Affleck, Event Platform Specialist

events they so desired, and the third was to implement a retention strategy of ‘leave no member behind.’” With a retention goal of 85%, the YPO team faced a significant challenge.

The team first set an internal Cvent optimization goal to ensure YPO was fully leveraging the tool, addressing technical debt challenges, and expanding the integration with YPO’s full platform ecosystem. Managing over 300,000 registrations through Cvent across global chapters, they found YPO was not utilizing certain capabilities in full. The global event websites needed to be transitioned to New Standard Registration (Flex) to create a modern look and feel. The event directory was manually managed via WordPress, resulting in a labor-intensive process. Lastly, event surveys were manually edited and implemented through a third-party tool that did not sync attendance automatically with Cvent.

## Powering YPO Executive Experiences with Event Technology

Their first goal was to meet the immediate networking needs of their members. To create a sense of connectivity, YPO leveraged Cvent’s mobile event app. “When the pandemic hit, it really forced us to look at our virtual arsenal, if you will,” says Althea Iglesias, Event Platform Specialist. “We really used the app and got creative with it because some of our programs extended long periods of time...So it really provided a strong, stable way to connect and have some engagement during the process of that programming.”

The new initiative also meant YPO needed to deliver vital and cutting-edge digital content to their members virtually across the entire YPO ecosystem, whether live, simulive, or on-demand. As they accelerated their digital transformation strategy, the team developed a series of

pilot programs that eventually became the YPO Virtual Event Platform Ecosystem. With this comprehensive new initiative in place, they sought an integrated virtual event platform to support their rapidly expanding virtual offerings. They found the right solution in the Cvent Attendee Hub.

The use of the integrated Cvent platform meant YPO could track the member journey across the entirety of the event lifecycle. Moreover, the flexibility of the platform allowed YPO's team to customize the experience for their members. Althea explains, "We wanted solutions that would allow us to have a lot of different modalities, so the Cvent Attendee Hub helped with that."



## Seamlessly Integrated Solutions with Cvent

Equally important, they needed to capture consistent event metrics across all virtual events, many of which were managed via Zoom. A Zoom API integration within the Attendee Hub allowed YPO to accurately capture this key data. "Having that Zoom API within Attendee Hub was a great way to show the ease of using the integrations that Cvent has built into," says Mandy. "It allows us to track who is really participating in these events." She notes that previous processes were entirely manual, requiring dedicated resources to update and sync Zoom registration lists to mark participation.

The Zoom API integration was able to automate these manual tasks that previously took a full-time position to manage. Moreover, YPO previously relied on a third-party tool to deliver surveys, thereby creating an even more labor-intensive process. Tanya notes that this integration now gives the YPO team greater insights into the value of their content for members. She says, "We needed a way to streamline delivering surveys and the API really helped with that, so now we're really able to determine which content is producing the most value."

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## Delivering an Innovative Virtual Event Platform Ecosystem to YPO Members

Developing the YPO Virtual Event Platform Ecosystem has enhanced their member offerings by optimizing their content delivery. “We were really looking at different ways to deliver that content in easy, digestible formats that were quick and accessible,” explains Althea. “So this really launched us into being able to analyze that.” As the YPO team streamlined their virtual offerings to best serve their members’ needs, they realized the importance of optimizing content for the virtual audience. “We really had to examine the content of our events this past year, and we realized we were trying to churn out virtual events but attendance would fall off,” notes Tanya. “So we became more deliberate about the content we were choosing and the events we developed to make them more robust and engaging. And we noticed a significant improvement in our attendance.”

Mandy adds that the value-add of virtual events for their global membership base is clear. “Our increase in registrants has been astronomical this year,” she says. For example, a new virtual Chairman event series saw more than 5,000 virtual registrants. The keynote, featuring Michelle Obama, was executed as a simulive session with live Q&A in the Attendee Hub. “The delivery of the content was extremely successful,” says Althea. “It was very professional, very slick, and it literally went off without a hitch.” Mandy adds that though they usually have a dedicated team ready for technology troubleshooting, they found there were virtually no issues with members accessing the Attendee Hub.

Tanya notes that the seamless user experience was a result of their careful work in optimizing YPO’s Cvent solution suite during the pandemic. “That experience really proved to us the value of using Cvent and its platform for the stability and the ability to house everything in one place,” she insists. “Whatever we put into the Event Management portion of the event just seamlessly ran into the Attendee Hub, so it’s very convenient. Being fully integrated and Cvent native is such a huge benefit.”





## Creating Value-Add for Members with Cvent and Salesforce Integrations

YPO further streamlined internal workflows during this time through additional integrations. “Integrating Cvent with Salesforce was a huge priority as we transitioned to a virtual-only organization,” says Tanya. Whereas the team previously managed their event directory manually, the new environment meant rapid updates were needed, often with little leeway. The Salesforce integration ensured content could be created and updated quickly so their members could easily find what they needed. “Integrating Cvent with Salesforce allowed us to build a community site for members called Connect,” explains Tanya. “And within Connect, we created an events directory which is essentially a living visual catalog of YPO’s rapidly expanding event portfolio.” By eliminating what was a cumbersome manual process, the seamless integration now ensures efficiency for YPO teams and accuracy for their members. They are also now leveraging Artificial Intelligence (AI) to suggest programs for YPO members based on previous event attendance. “There’s no way we could have done that with a manual process,” says Tanya. “Without these integrations, forget it.”

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In fact, Mandy views the time savings and elimination of manual processes as a silver lining during an otherwise challenging year. She explains, “By taking inventory of our virtual technology and ensuring everything works together, it saves a lot of time. We used it as a force for good to help improve what we are delivering for our members and improve internal processes by eliminating a lot of manual work.”

## Accelerating the Future of YPO with Event Tech

While Tanya, Mandy, and Althea all work in various capacities within the platform, each values the dedication of their Cvent team in supporting their different initiatives. “We always feel very prepared and supported by Cvent,” says Tanya. “We work really closely with our account manager and with Cvent support, and it’s always very helpful.” In fact, their team recently stood up the Exhibitor Management and Appointments solutions with the help of Cvent support. “It was great because we had that guide of someone walking us through it, step-by-step,” adds Althea.

As they look at the future event portfolio, the team sees value in expanding their total event program across different event formats, whether virtual, hybrid, or in-person. They are also looking forward to adopting new Cvent solutions like Access Portals. The YPO team insists, “Access Portals will reduce manual work, streamline the event submission process, and create transparency in event reporting.”

They’re equally looking forward to exciting new features within the Attendee Hub that will help further connect their members. Tanya notes, “We’re very excited about the Discussions feature in the Attendee Hub because again, going back to peer-to-peer, our members really value that small group connection.” To achieve this goal, Tanya aims to further develop YPO’s technology partnership with Cvent. It’s one she sees as an integral and mutually beneficial relationship that will continue to grow with the organization as they continue to expand their event portfolio. “We truly value our partnership with Cvent,” she adds. “It’s so beneficial all the way around.”

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