

# Cvent – Planning Your Event

## **Cvent has the ability to:**

- Send email communications such as invitations, reminders, confirmations, follow-up
- Create a website to promote your event, share event details and allow people to register
- Survey participants for feedback after the event
- Report on just about every detail of your event

## **What you can expect from me:**

1. An initial GoToMeeting to show you what last year's site looked like and to go over your answers to the questions for Cvent setup.
2. Phone calls and email communication as we prepare to launch your site.
3. Keep in mind that I'm your Cvent person, but not the person to approve changes you want to make to your event, regarding issues such as deadlines, venue issues, budget, etc. You'll need to work with Colleen on those issues and then communicate changes to me.

## **Things to keep in mind about events/Cvent:**

1. Registration payment options are VISA, Mastercard and Discover. No Checks.
2. Widgets can be used on the MACRAO website (as well as other sites if desired) to link to the event website.
3. Your committee members will need to register for your event.
4. Lots of reporting capabilities – just ask and I may be able to pull the data you need.
5. Building the emails and website take time. I do a lot of testing to make sure that your participants have a good experience, so your feedback is crucial when I ask for it.
6. I expect you will need to communicate with me A LOT as we get closer to your event. You'll need me to pull registration lists and reports, so know that I plan for this and don't mind you asking, calling or emailing me...a lot.

## **What I need from you:**

1. Proofread and edit text on emails, as well as test all links in emails. I will send out anything you need and help you in any way, but you need to come to the table with the message you want sent. I can provide you with last year's emails which are usually a good place to start. I'm happy to help edit and give suggestions but won't write everything for you.
2. Test registration – I'll even provide you with test credit card numbers to make sure everything is working properly before we launch.
3. Think about the end game. Cvent is happiest and easiest to use when things are set up ahead of time. Do your best to think about what you'll need in the end and communicate that information with me. If I know what you need, I can help you figure out where/how to set that up in Cvent. A good start here is to read over the feedback from last year's event and to ask your committee about things that could have gone smoother. Can we improve your event with information collected in Cvent?

## **My contact info:**

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# Setting Up Your Event in Cvent

1. Name of event
2. Start day/time and end day/time
3. Location/Address/Phone
4. Hotel Name/Address/Phone/Website - costs/options/deadline for guaranteed rates
5. Registration options – one day/two day, etc.
6. List of committee members
7. Early bird deadline (must be registered by 11:59pm on this day to qualify)
8. Absolute last day to register
9. Costs of attendance (early bird rate, regular rate, additional charges)
10. Name/Phone/Email of contact(s) for questions from registrants
11. Capacity – maximum number of registrants
12. Description of event – this info appears on the website and should grab the audience's attention and make them want to attend the event
13. Dress – most of our events have been listed as business casual or school spirit wear
14. Maps/documents you want participants to be able to download
15. Event theme/colors and/or logo (if you have one)
16. Parking – fees, locations, details, etc.
17. Nametags needed? –templates available
18. Guests – if allowed, as well as costs, tickets, etc.
19. Information or special questions you want to ask your registrants
20. Meals – details are good here (questions to identify food allergies are included)
21. Travel grants – how many, amount of each
22. Travel grant deadlines: application, notification, etc.
23. Feedback Survey questions
24. Widget details – what do you want included?
25. Participation certificate (signature of committee chair needed)
26. Agenda for event – including time and room locations (built on website – pdf optional)
27. Event Email - dates needed for all (samples below)
  - a. Sent to before registration to invite list...and then to those who have not registered
    - i. Invitation to the event
    - ii. Reminder Invitation
    - iii. Early Bird Rate Reminder
    - iv. Last Chance to Register
    - v. Others such as Agenda Added or Extended Early Bird
  - b. Sent when someone registers
    - i. Registration Confirmation
    - ii. Modification Emails
    - iii. Administrator/Group Leader Emails
    - iv. Others such as Agenda Added or Event Updates
  - c. After the event to those who attended
    - i. Post-Event Feedback Survey
    - ii. Survey Submitted
    - iii. Last Chance to take the Feedback Survey

# Cvent – Travel Grants & Annual Awards

We use Cvent to send out communications and collect nomination/application materials for travel grants and annual awards to our MACRAO members.

## **Cvent has the ability to:**

- Send email communications
- Create a website where those who are interested can learn more about the grant/award
- Allow interested members to submit an online application/nomination (including the ability to upload relevant documents)
- Communicate with those who submit an online application/nomination
- Follow-up with travel grant winners, as well as those not selected

Using Cvent makes the process for application/nomination very simple, so the work your committee will need to do with these should be relatively easy.

## **What you can expect from me:**

1. An initial GoToMeeting to show you what last year's site looked like and to go over any changes for this year's travel grants or annual awards.
2. Phone calls and email communication as we prepare to launch your site.
3. Applicant/nominee information materials within a week of closing – sometimes the same day.

## **What I need from you:**

1. Proofread and edit text on emails as well as test all links in emails.
2. Test the application and nomination process.
3. Select applicants for grants/awards by agreed upon deadlines and share that info with me.
4. Follow up with your travel grant winners and make sure they register. We don't want grants to go to waste. I'd suggest selecting alternates in case your winners end up not being able to attend.
5. For Annual Award winners, I'll provide you with the submitted nomination materials. You will follow up with the nominator, as well as working with the winner on details such as attendance at the conference, presentation of a session, etc.

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