

Events Management

Information Strategies developed the Event Management solution using the Microsoft CRM 4.0 development platform, which provides scalability, flexibility, and extensibility

BACKGROUND

The Event Management solution is employed to organize event related information. It can also be utilized to plan and organize conferences, parties, seminars, business activities, and more. The application tracks event related information such as contacts, guest lists, invitations, guest responses, and notes and allows users to plan and organize seating arrangements, agendas and budget information.

PROBLEM

Fluctuations in schedules, time restrictions, budgets and other factors limit abilities to properly and efficiently plan and track events and meetings. The need to effectively communicate remains high because collaboration with others continues to be the most effective way to exchange ideas and information as well as set and accomplish goals.

Some key system requirements include:

- Custom reports to track guest responses to invitations
- Advanced Search capability to generate guest lists based on custom search criteria such as interests
- Flexible workflows to allow easy changes as procedures are modified.

SOLUTION

Information Strategies developed the Events Management solution using Microsoft CRM 4.0 as the foundation. Information Strategies also implemented a custom seating chart proof of concept to demonstrate CRM's capability to integrate seating arrangement data from third party products. This allows users to define seating arrangements such as number of tables and proximity rules with familiar, intuitive tools.

The Event Management solution allows event planners to effectively manage guest lists, invitations and track responses. Key features include: duplicate detection for

Solution at a glance

Microsoft CRM based application that leverages the user familiarity of Microsoft Office Outlook to plan and manage events.

Technologies Involved

Microsoft Dynamics CRM 4.0, Microsoft Office Outlook, SQL Server 2005, SQL Reporting Services, .NET framework, ASP.NET, JavaScript, PerfectTablePlan.

guest names, custom guest list reporting, advanced searches to track guests based on topics of interest, and scheduling follow up emails and phone calls.

Key features of the Event Management solution include:

- Automates business processes with CRM workflows
- Integration with other applications including custom ASP .Net applications and third party software
- Duplicate detection capability
- Built in tools to import and export data
- Outlook Integration - The Event Management solution is fully integrated with Microsoft Outlook which allows e-mail to be stored with subject and contact information, as well as synchronizing tasks and calendars.

The Event Management solution provides dramatic improvements in process visibility and efficiency and reduced the time needed to plan and organize conferences, parties, seminars, business activities, and more. These benefits significantly reduce training time and maintenance costs.

FURTHER IMPLEMENTATION

As State and Local Governments seek to reduce costs and training time, the flexible, dynamic nature of Microsoft CRM 4.0 ensures the Event Management solution can be enhanced and customized to work the way you work to provide a cost effective solution for reducing the time required to manage Event Planning needs.

Information Strategies continues to be a leader in developing innovative solutions based on Microsoft CRM that help organizations meet increasing demands for better service and quality at a lower cost.

