

# EVENT / TRAINING MANAGEMENT WITH SALESFORCE



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## Key Options



**Salesforce** is an excellent platform for managing Event and Training businesses; the ability to segment customer data for marketing and customise the user experience will enable you to differentiate your business from your competitors and operate in the way you want - not the way your software dictates.

The 3 key off-the-shelf packages that are in the market are Cvent, E-Touches and Eventbrite, which all integrate with Salesforce in a different manner.

A successful Salesforce implementation relies upon having the correct data structure. While the 3 apps listed above all offer a simple integration with Salesforce, do they function in the best possible way for you? It is important to check the functionality matches your desired and optimal business workflow.

If you find they don't match the way you want to operate you can build your own event registration system within Salesforce using Salesforce Sites and the free Event Labs app.

## COMMON DATA STRUCTURE ISSUE

A common issue arises when an integration with an Event Platform creates 1 opportunity for every attendee. This is fine on a simple level, but what happens if one person buys 10 tickets for 10 separate people? You end up with 10 opportunities which are not linked and within Salesforce you cannot see quickly who bought what ticket for whom.

The more user friendly data structure is to have 1 opportunity linked to the person who booked the 10 places and have the 10 attendees as related 'attendee' records related to that.

Contact RCS for more information as we have experience building 3 event/training registration apps, thus eliminating the need for additional subscriptions outside of Salesforce.

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