



CUSTOMER SUCCESS STORY

**Creating value-driven
relationships across CAIS
events using Cvent**

CAIS





Founded in 2009, CAIS is a leading Alternative Investment platform that connects independent financial advisors with leading alternative asset managers and bank issuers to transact and engage on a massive scale. “As a fintech organization that operates a two-sided marketplace, our goal is to really automate those processes” explains Andrew DePaul, Senior Vice President of Digital Marketing.

The CAIS meetings and events program is aimed at bringing together the independent wealth management community in order to facilitate these relationships. “Events have become a really big focus of the organization within the last year or two,” notes Joanna Munjack, Director of Events.

Prior to 2022, there was no formal events program or department at CAIS. “Now, we’ve really grown our department and we’re hosting and participating in about 100 events every year,” Joanna says. “It’s a big aspect of the marketing program and driver of ROI for the firm.”

1000+

ATTENDEES AT ALTERNATIVE
INVESTMENT SUMMIT

\$3M

SPONSORSHIP REVENUE

150+

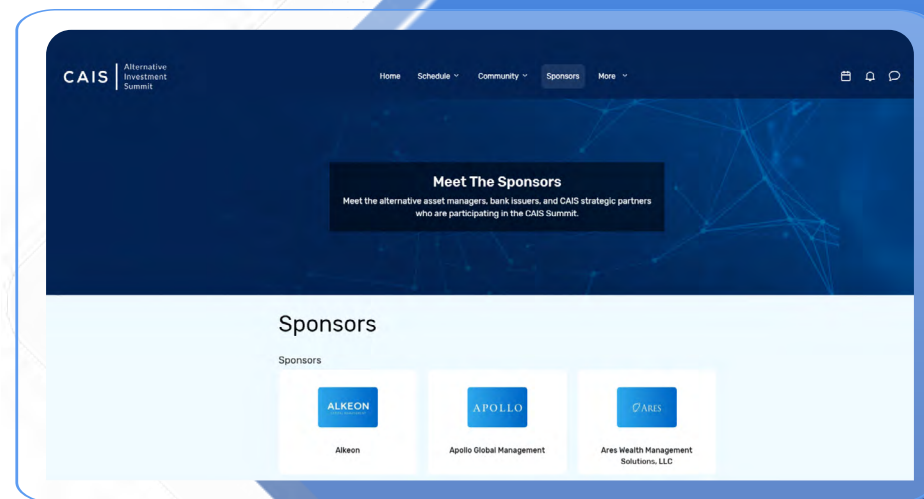
CONTINUING EDUCATION
HOURS AWARDED

Launching the CAIS Alternative Investment Summit

One catalyst for this explosive growth was the launch of their marquee conference, the CAIS Alternative Investment Summit. CAIS initially used Cvent for the first time in 2021 for a single internal event. The success of that event gave them confidence to power their inaugural Summit using Cvent.

What began as a means of bringing together CAIS' network of financial advisors, asset managers, and bank issuers has since grown into one of the industry's premier events. "We launched the Summit for the first time in October of 2022, and that was really the first time that there had been an event specific to the alternative investment space for financial advisors," says Joanna.

The success of the Summit ultimately spurred the development of additional CAIS events throughout the year, including Due Diligence events focused on strengthening relationships with specific firms and the newest event series, CAIS Live. They also sought to expand the reach of their Summit while funding the event entirely through sponsorships and partnerships. In addition, they wanted to leverage the marketing automation features of Cvent to ensure their sales pipeline was fully connected to the Summit.



Fast-tracking event program growth at CAIS with Cvent

To achieve these goals, Joanna and Andrew needed to automate and scale their events program. “Before we started working with Cvent, we were doing a lot of things by Excel or by Airtable,” Andrew explains. “We had no track record of what we were doing.” By adopting Cvent’s integrated Event Marketing & Management platform, they were able to dramatically grow their program. This included leveraging solutions like Cvent’s Registration platform, Speaker Resource Center, Exhibitor Management, Attendee Hub and Event App, Onsite Solutions, Appointments, Premium Surveys, and a Salesforce integration. “By involving Cvent, we were really able to ramp up what we were doing at scale, and map everything back into Salesforce to better track the attendee journey,” Andrew insists.

Leveraging these integrated solutions gave CAIS the experience and expertise needed to build a truly robust events program with a small team. “We went from zero to sixty very fast, from having nothing tracked to having the hundreds of events we now have all streamlined in Cvent,” Andrew says. Having everything centralized within one source of truth has allowed Joanna and Andrew to eliminate stop gaps and streamline workflows internally. Joanna insists, “It’s really helped us with the inconsistencies and inefficiencies that we had prior to using Cvent.”



Andrew agrees, noting that using Cvent solutions have drastically improved processes and helped provide better visibility into event ROI for senior leadership. “It streamlines everything, and it gives us one tool we can go to,” Andrew says. “Everything is managed in one system, and we’re able to send everything over to Salesforce and can give our stakeholders real time data.”

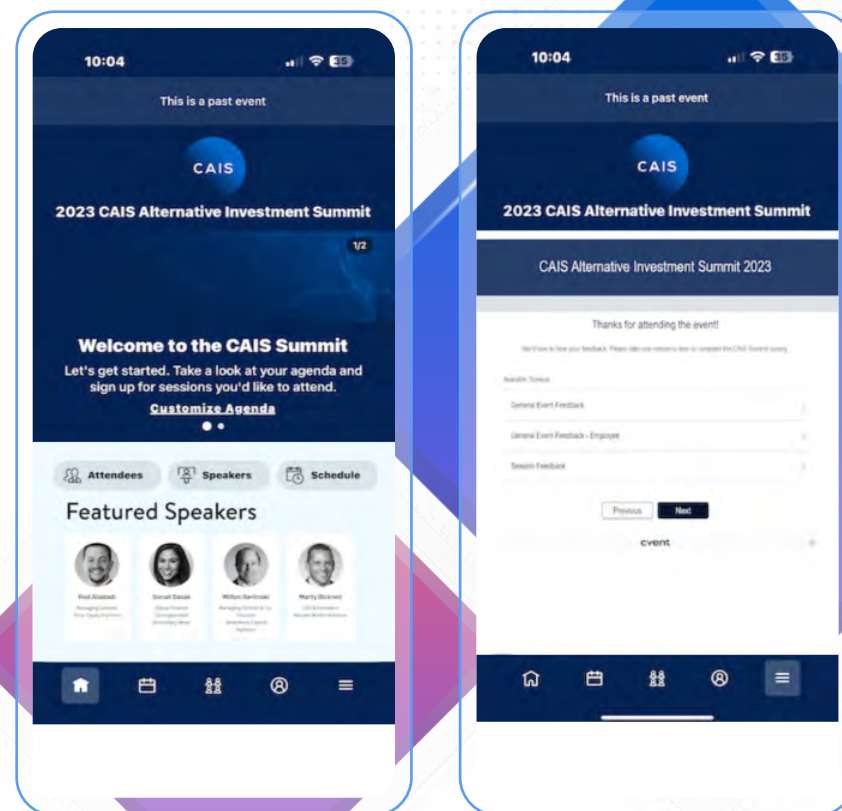
Creating connections with the Cvent Attendee Hub and Appointments

In order to successfully scale their Summit after the initial success of 2022, the CAIS team leveraged several Cvent solutions. The Attendee Hub and native Event App provided attendees a centralized hub where they could build their agenda, view session and speaker details, and stay up to date with push notifications.

They could also connect with their peers through integrated networking, including direct messaging, attendee recommendations, discussions, and more.

Onsite, attendees could access their personalized agenda via the mobile app, allowing them to self-manage their schedule. Features like live polling, chat, and Q&A allowed attendees to engage in real time.

The easy-to-navigate mobile experience also meant attendees could easily view additional CAIS event offerings, network with one another, and provide feedback through embedded surveys.



In addition, attendees were able to easily navigate appointment scheduling using the embedded Appointments tool. They could create, reject, or accept appointment requests easily within Attendee Hub, defining appointment details like location and including notes.

CAIS was able to define and manage appointment parameters, set up web and in-app push notifications that would automatically trigger when an appointment was canceled or modified, and manage visibility, permissions, and scheduling rules. This ensured a seamless experience for attendees while providing the needed control for CAIS event managers.

They also used Premium Surveys to not only gather feedback at the event and session level, but to assess event performance year over year. They then used this data to better prove ROI for partners and sponsors in an effort to fully fund the event via partner and sponsorship dollars. Andrew explains, “We used the information the Premium Survey tool gave us to go back to people and use all the details of the event to prove its success in the hopes of having everything fully sponsored.”

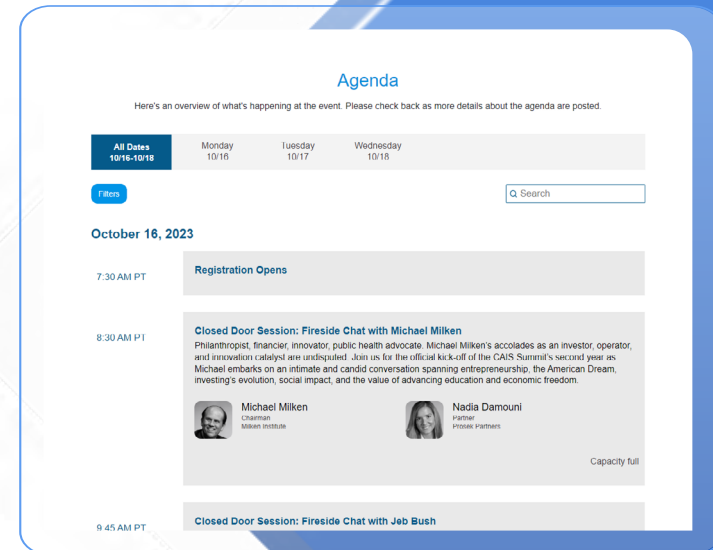


Automating Speaker and Exhibitor Management for increased efficiencies

In addition, CAIS used Exhibitor Management and Speaker Resource Center to automate processes related to speaker and exhibitor management. The Speaker Resource Center coordinates speaker activities within a single portal, allowing speakers to self-serve and complete tasks like uploading their bio, updating social links, and providing materials.

The Exhibitor Resource Center, similarly, automates exhibitor management tasks like uploading profile information, adding documents or resources, and uploading branded assets. Automated alerts ensured they stayed on target to meet important deadlines for the Summit.

Joanna adds, “The use of the Speaker Resource Center and Exhibitor Management undoubtedly helps take some of the manual process off our team.” Not only does this save valuable time, but these solutions integrate seamlessly with the rest of the Cvent platform — ensuring they maintain full visibility into all content and reporting in a single location.



◆ Powering in-person experiences with ◆ OnArrival and LeadCapture

For in-person experiences, CAIS relies on Onsite Solutions like the OnArrival and LeadCapture tools. OnArrival provides attendees an effortless check-in and badging experience, whether at the registration desk or at standalone mobile kiosks. This not only eliminates long lines, but mitigates the need to pre-print badges, which often results in wasted time and resources. “We used OnArrival and it was an incredible experience,” insists Joanna. “When we surveyed attendees, one of the highest rated areas was registration just because it was so quick and seamless.” In fact, CAIS now uses OnArrival Premium, OnArrival 360, and Event in a Box across their events. These solutions all provide a fantastic first touch point for attendees with varying features and service levels.

With Event in a Box, CAIS is able to create a quick check-in experience for smaller audiences with all the needed hardware shipped directly to them – including iPads with tabletop stands, printers, routers, and badge stock for on-demand printing. They also have access to 24/7 customer support and other resources to ensure everything goes smoothly. OnArrival Premium and OnArrival 360 offer additional capabilities, including session check-in and tracking, signature collection, check-in planner alerts, kiosk mode, and more. With OnArrival 360, they also receive support from an onsite technical expert and have access to additional badge supplies and hardware.



“We went from zero to sixty very fast, from having nothing tracked to having the hundreds of events we now have all streamlined in Cvent.”

ANDREW DEPAUL

Senior Vice President,
Digital Marketing

“”

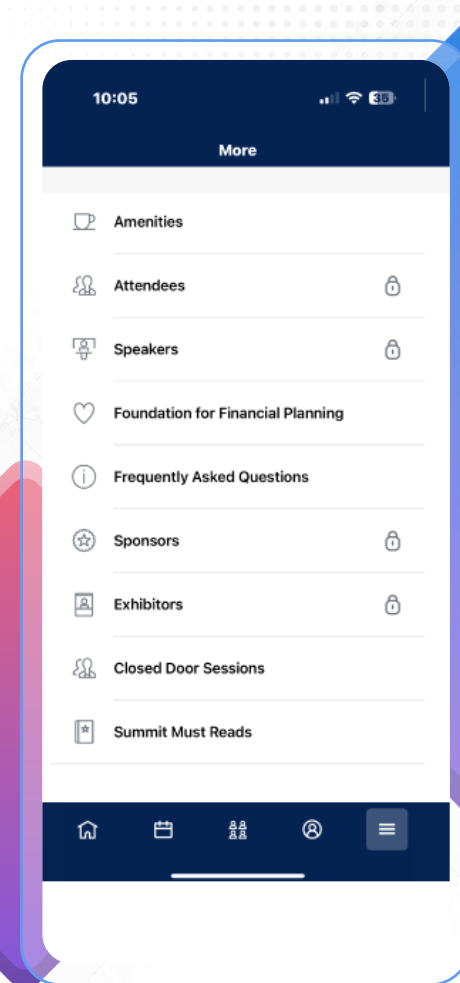
Session scanning and attendance tracking through NFC badges not only capture session attendance, but allow CAIS to easily monitor session capacity and track attendance in real time via the OnArrival app. “We were excited to use the NFC technology for some of our breakout sessions,” notes Joanna.

In addition, using LeadCapture for the events they attend gives CAIS an automated solution for lead generation. Using LeadCapture, they can easily scan, qualify, and rate leads in real time for more accurate follow up. They were able to access detailed reports via the Exhibitor Portal and export them in seconds, giving them an accurate, up-to-date view of all leads.

“Now, we’ve really grown our department and we’re hosting and participating in about 100 events every year. It’s a big aspect of the marketing program and driver of ROI for the firm.”

JOANNA MUNJACK
Director of Events

“”

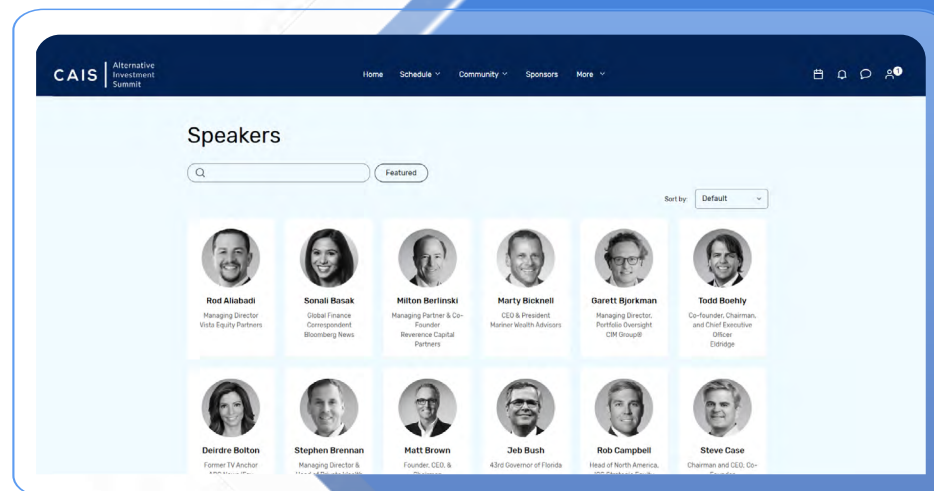


Doing more with less: Fostering strong partnerships to scale event program growth

The successful growth of the events program at CAIS is a credit to the close partnership between their marketing and events teams. Streamlining their event marketing processes has been invaluable, due in no small part to the use of the Salesforce integration with Cvent. This integration creates automated data flows across the event lifecycle, allowing CAIS to automatically sync contact lists and updates – thereby eliminating manual labor and the capacity for human error. “The MarTech integration we’re using with Salesforce is great for real time updates into campaigns, creating and updating contacts, and so on,” Andrew elaborates.

They can also automatically sync contact updates and activities as well as automate task and opportunity creation within Salesforce, making it easier for their team. Leveraging the integration to track overall marketing engagement and campaign performance allows CAIS to rely on data-driven decision making in strategizing their overall events program.

Another key to successfully scaling their program lies in their growing relationship with Cvent. “We have a lean team, and everyone is doing more with less,” says Joanna. “Looking at how we can take on more of the support services Cvent offers is important so we’re not spending all of our time on time-consuming tasks.”



She notes that the feedback loop her team maintains with Cvent is invaluable. “It’s been a tremendous partnership,” she says, adding that Cvent not only listens to CAIS’ feedback, but implements the changes “pretty immediately.” In fact, by working closely with Cvent’s Professional Services, Client Services, and Account Management teams, CAIS was able to make their second Summit an even bigger success than the first.

The second Summit hosted over 1,000 attendees and saw an impressive 90% attendance rate. They managed dozens of appointments, saw an 80% app adoption rate, and awarded hundreds of CE credits. In addition, they successfully raised over \$3 million in sponsorship revenue and over \$2 million in additional revenue. The clear ROI of the 2023 Summit has proven the value of hosted events at CAIS, leading to the development of a new series called “CAIS Live.” These nationwide events, managed through Cvent, consist of both open and private experiences that bring together independent and broker-dealer advisors with leading alternative managers across multiple cities.

In fact, Andrew says continuing to centralize CAIS’ event management within Cvent is an important takeaway for his team, particularly when looking at previous events. “With implementing Cvent, I’d say the biggest learning for us is leaning into everything that the platform offers,” he says. “We tried to use parts of HubSpot or other email marketing tools to do what Cvent could have already done, so this year we’ve pivoted and gone back to using Cvent for everything.”

He notes this includes managing invitations out of Cvent, using registration types, and leaning more into the capabilities of different Cvent solutions. “As a result, we’ve had a more seamless experience with registration and numbers have gone up – all by doing simple things and using what Cvent offers out of the box,” he insists.



◆ Extending the attendee journey to ◆ better prove event ROI

In fact, extending the life of their content and ensuring post-event engagement has been a key focus for CAIS. “I would say one of the primary areas where we’re taking the events and activating them through all of our different marketing channels is through the video content,” Joanna says. “The plan is to have it put onto the Attendee Hub and then streamline it through our different campaigns for our attendees.”

She adds that repurposing this content for attendees gives it an extended shelf life that helps prove the value of events as a marketing channel. “It’s that continual engagement that’s so vital,” she insists. Andrew agrees, noting that recycling content creates a “selling point” for the next Summit. He says, “It’s all built into drip campaigns and hype emails we have going out about the next year’s Summit.”

Importantly, leveraging the data found in Cvent’s on-demand reporting has helped Joanna and Andrew better prove event ROI to their leadership. “When we’re resourcing and budgeting, we’re really looking at the pre and post-event impact,” says Joanna. “And what we’ve seen is that it’s proving events are really a strong ROI for the firm.” She adds that the value they’ve seen from hosted events in particular is helping to shape their future strategy. She says, “Moving forward, we’re trying to make sure we have the right balance of hosted events versus events we’re participating in.”



“When we’re resourcing and budgeting, we’re really looking at the pre and post-event impact. And what we’ve seen is that it’s proving events are really a strong ROI for the firm.”

JOANNA MUNJACK
Director of Events

“““

In light of this success, Joanna makes it clear that the crux of their evolving events strategy still lies in fostering successful relationships. “The industry we’re in isn’t a ‘one transaction and you’re done’ experience,” she says. “It’s very much a relationship business, so staying in front of our clients and making sure the content is fresh is always so important.”

She and Andrew are therefore focused on creating more personalized experiences across their events. Joanna notes, “We’re wanting to really tailor that agenda to make sure it’s customized for our audience and looking at how to make these events more experiential.”

Andrew adds that another goal in the near future is to simply lean more fully into the tools at their disposal. “What’s next for CAIS, especially when it comes to events with Cvent, is just leaning more into the technology,” he says. “I think there’s so much more we could be doing to lean into everything Cvent has to offer, and we’re finding new opportunities every day as we work with Cvent to uncover all the things we can do.”

This mindset has truly created a powerful environment where events can thrive at CAIS in the near future and beyond.



“I think there’s so much more we could be doing to lean into everything Cvent has to offer, and we’re finding new opportunities every day as we work with Cvent to uncover all the things we can do.”

ANDREW DEPAUL

Senior Vice President, Digital Marketing

“”



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.

[Learn more](#)

