



## Ensuring efficiencies across Salesforce offices with Cvent Diagramming and Seating

**3+**

years utilizing  
Diagramming and  
Seating solution

**3,000+**

Event Diagrams housed  
in Cvent solution

**10+**

global Salesforce offices  
using Diagramming and  
Seating solution

Salesforce, the world's number one CRM, has helped lead the SaaS revolution across the technology industry for over twenty years. With a global workforce of over 70,000 employees, Salesforce's internal events serve as key drivers of employee engagement and innovation. Gabi Kallmeyer, Associate Event Manager, and Lauren Leto, Event Manager, support Salesforce's events program out of their New York and San Francisco offices, respectively. Gabi helps manage the Salesforce Tower New York 'Ohana Floor and is responsible for delivering white-glove events for Salesforce executives, customers, employees, and non-profits in the community. Lauren manages a diverse portfolio of event programs in Salesforce's three San Francisco offices, supporting their ecosystem of employees, customers, and partners.



## Improving internal event efficiencies with Cvent Diagramming and Seating

Having partnered with Cvent since January 2019, the Salesforce team adopted Cvent's Diagramming and Seating solution (formerly known as Social Tables) to help bring their event visions to life. Lauren and Gabi worked closely with their Cvent account team to ensure the success of the events across their portfolio. Since 2019, they have relied on the Diagramming and Seating solution to design internal events at their global office locations. Salesforce's Diagramming and Seating account is structured as a hierarchy account, meaning there's one primary team above several other accounts representing their global offices. They have one primary team, as well as Admin access to each additional managed team in their hierarchy. There are several different offices currently leveraging the tool to support their internal event programs, including Salesforce Tower Atlanta, New York, Indianapolis, London, Sydney, Tokyo, San Francisco and San Francisco East & West and Burlington buildings. They are also adopting the tool to use at their newly acquired Slack offices.

Utilizing the Diagramming and Seating solution has helped the team move away from cumbersome manual processes and increase efficiencies across their global teams. When Lauren first joined Salesforce, she was surprised to see they relied on disparate, largely manual processes to manage diagramming and seating requirements. "We were taking screenshots of our CADs and putting those in Google docs, then drawing directly on the screenshot," she recalls.

They set out to source a technology partner who could help automate these highly manual processes. They chose to partner with Cvent due to the flexibility and comprehensive nature of the Diagramming and Seating solution. In fact, Lauren had prior experience using Cvent at a previous organization and was excited to see how it would benefit Salesforce as an organization.

After selecting Cvent as their solution provider, Lauren and Gabi faced the initial challenge of onboarding their global team. "We have different teams with different leaders, so getting everyone onboarded with the training was a process as we had to align everyone across regions and offices," notes Lauren. The comprehensive process consisted of self-guided online training courses as well as a live guided training from Cvent product experts.

Lauren says she is impressed with the progress her team has made in just a short amount of time. They not only adopted and implemented the tool across their global organization, but have become solution experts in their own right. "Where we came from to where we are now, it's just incredible to see," she insists. "Each unique Salesforce office participated in the personalized training offered by Cvent's Learning and Development team, ensuring that all users understood the ins and outs of the Diagramming and Seating solution."





# Navigating the global return to office with Cvent solutions

During the pandemic, the Salesforce team faced several challenges. After a significant amount of time managing a largely remote employee base, Lauren and Gabi were tasked with supporting the global return to office. To help facilitate a safe process, Lauren and Gabi relied on the Diagramming and Seating tool to manage their floor plans. They needed to ensure the floor plans met social distancing requirements as well as other health and safety measures, all without having to manually configure diagrams. Lauren explains, “We had to look at all of our floor plans that were in the system and draw on every space to see what it would look like with six-foot distancing and three-foot distancing.”

With the diagramming component included in the solution, they were able to manage this process with ease. The diagramming feature allows the Salesforce team to envision an accurate depiction of their office spaces with all of the permanent furniture included. Salesforce offices have a unique structure in terms of office set-up, so all of the intricate details are included in their CAD floor plan designs from the professional services team at Cvent. The capabilities of the tool impressed even their senior leadership. “People were shocked we even had this tool,” Lauren notes. “Our floor plans were being shared very widely to our senior leadership, showing what our capacities would look like with three-foot distancing and six-foot distancing, so it was very helpful.”

Given the global nature of the Salesforce employee base, collaborative capabilities within the tool were particularly important. Different teams across offices were able to collaborate on floor plans while at different locations or in other time zones. The flexibility of the tool was particularly important as the pandemic continued to evolve. Whenever new health and safety requirements were introduced or updated, the Salesforce team was able to make quick adjustments without needing to start over from scratch. “It was a lot of stop and go, so it was nice to have that tool in place and have those floor plans ready,” Lauren adds

In particular, the features of the Diagramming and Seating solution offered detailed illustrations and accurate diagrams, from overall layout to furniture and even specific colors. The Salesforce team utilizes the tool to create visual indications with arrows and text to indicate the proper flow of the room from where to check-in, which stairwells are closed, and where to enter and exit. This was particularly helpful from 2020 to 2022, when Lauren was the program manager for the highly visible COVID-19 Testing Center. The visual indicators helped with the strategy, execution, and rollout COVID-19 guidelines and communications across the business and events.



## Streamlining internal processes across Salesforce's global offices

Within their New York office, Gabi's team works closely with an internal workplace services and facilities team to manage space setup and logistics. "We have events in the office almost every single day, if not multiple times a day," Gabi shares. She adds that having these floor plans readily available as part of their detailed project plan allows the facilities team to easily manage setup in line with the space requirements. "They can essentially use this to do everything from start to finish without me having to regularly check in, which is great," Gabi notes.

Lauren agrees, noting that the same is true for their west coast events. Given that the Salesforce offices serve as both event space and a traditional office space, the diagrams are helpful for external vendors who may not be familiar with the Salesforce office layouts. "It's very much a hospitality space but it's still an office, so it's nice to show them the floor plans so they have visibility into the fact that there are desks nearby," Lauren explains.

In looking at the efficiencies created for the Salesforce teams through the use of the Diagramming and Seating solution, time savings are a clear measure of success. Gabi explains, "I used to create 3D renderings in Google Slides and it was a nightmare." She adds that the previous silos between teams created stop gaps and impeded efficiency. This was particularly problematic given the incredible growth of the company in recent years. She notes, "I can say with confidence that the consistency factor has been important, especially with the amount of growth we've had. With new teams and spaces, having certain processes in place that all partners are used to seeing is very helpful."

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— Gabi Kallmeyer, Associate Event Manager





Gabi notes that Salesforce typically relies on its own technology, but the team now considers the Diagramming and Seating solution an integral part of their tech stack. She shares, “Even for the newer teams, they know they’re going to learn the solution, because everyone uses that that solution.” Being able to view past events, repurpose saved layouts, note favorites, and use templates ensures consistency amongst their teams. If a power user diagrams a perfect event set-up, then the other users across global offices can easily duplicate the event to modify it for future needs.

Lauren notes that these efficiencies have led to improvements in their global team’s processes. She says, “As far as qualitative results, we can access central floor plans across offices.” Previously, floor plans were saved in each person’s preferred document location, such as Google docs. Having a centralized database of all floor plans across offices has vastly improved global collaboration.

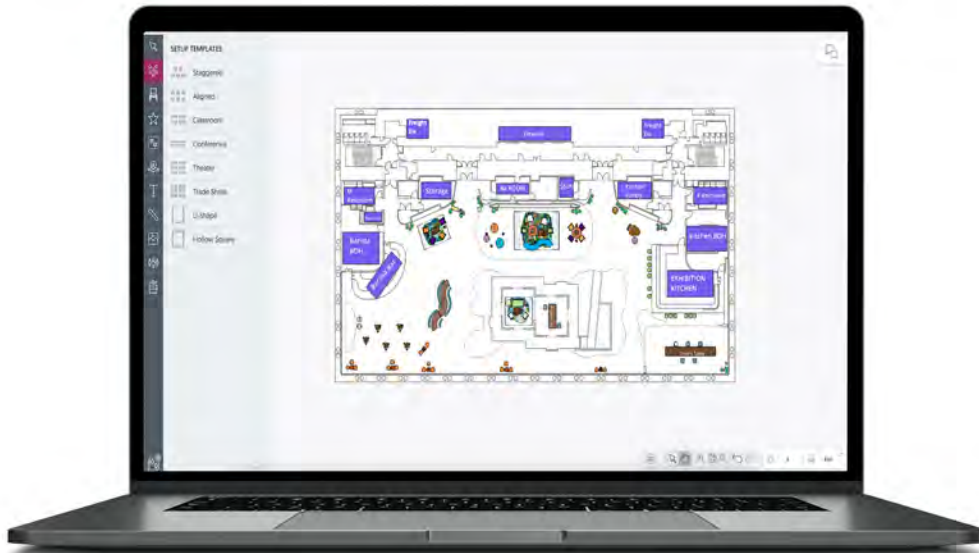
Lauren cites a recent event held at the New York office as an example. “Those stakeholders wanted the same exact floor plan for a second event in San Francisco,” she shares. “I went in and quickly copied the existing floor plan from that event, and it just made things a lot easier and shareable.” Gabi agrees, noting that their executive team’s global meetings are now easier to manage thanks to existing floor plans already housed within the Diagramming and Seating solution. She says, “I did a reception in February that our Atlanta office was going to duplicate in March, and they were able to just look at the floor plan in Diagramming and Seating without me having to explain anything.” The Salesforce team uses these features to save ample time when planning their next event.



## Scaling for the future at Salesforce with event technology

As system level admins, Gabi and Lauren have visibility into usage across their global teams. With the recent growth of the business, they appreciate the flexibility to manage account access and maintain consistency within the tool. Lauren explains, “We recently acquired Slack and had to add their floor plans, and it’s creating scalable challenges we need to manage as we continue to grow.”

This visibility and flexibility also ensures they can more easily navigate changing requirements based on market trends. “With budget constraints and the market we’re in right now, it’s good to ensure we are being mindful of having the right users and having the right in place,” Lauren adds.



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— Lauren Leto, Event Manager

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As they look towards the future and expect more growth across Salesforce’s offices around the world, Gabi and Lauren are eager to continue utilizing the tool to drive time savings and efficiencies for the organization. Moreover, Lauren adds that she appreciates the opportunity to gain technology expertise in a new solution to further bolster her technology skills. “I love having yet another great system on my resume,” she shares. “It’s nice to be an expert in the system now.”

They look forward to the continued partnership with Cvent in the future as they expand their global workforce and continue to support Salesforce offices worldwide.



# cvent

*Cvent is the global meeting, event, travel, and hospitality technology leader.*

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