

A One-Minute Guide to One-Touch, Onsite Reporting

A Financial and Insurance Conference Planner's Primer

If time is money, then an obvious way to increase value is through speed. Onsite reporting, or instant reporting, enables financial and insurance meeting stakeholders to immediately gather and analyze all surveys, polling, and other meeting data on a single spreadsheet. With the click of a button, they can visualize responses and reactions at the end of an individual session or upon completion of the entire event.

For financial services road shows and event series, understanding what worked and what didn't is critical to ongoing improvement. In the past, any sort of survey results came days or even weeks after the event. Results were skewed with the bias of retrospect, and the relevancy of these results lost potency with every passing day.

The advent of instant reporting is truly a benchmark moment for technology advantage. In addition to polling results and survey answers, the one-touch onsite report includes questions asked, who asked them, and when during the event they were asked. It delivers more analytics, faster, and the immediacy of these results fuels the ability to course correct during a single event or series of meetings.

For the meeting planner and business sponsor, this provides two immediate advantages:

Series Improvement

Investment banks and asset management firms selling new products or launching updated versions of existing products often schedule road tours in a series of major cities. Before instant reporting and analytics, these individual meetings were simply replicas of each other, one-size-fits-all versions of the same presentation, information and experience. Now, meeting planners can access and utilize data in real-time. With the click of a button they can see what is working, which speakers created impact, and how much information was actually retained from presentations. From these results, they can learn and improve with each subsequent city. By the end of the tour, their event is fine-tuned and geared toward optimal audience engagement. An additional benefit of these city-specific reports is the ability to look at past data and tailor presentations and content to the individual markets.

Instant Follow-up

Time is the new gold standard. You can't produce more; you can only make the most of what you have. It is essential to maximize learnings from a meeting and act on what is learned for the greatest impact. If we can make contact with potential clients while the experience is still fresh in their minds, the results will be significantly more impactful. With the ability to quickly integrate survey data into Salesforce or other CRM systems, a prospect can indicate interest in a morning session and sales can respond by lunch. No time is lost, and as a result, financial product managers can form more profitable client relationships based on quality services and responsiveness.

Identify one of your meetings or road tours that will benefit most from one-touch, onsite reporting. Once you know your target, make the move toward next-generation live meetings and the value they create.