



Creating an Effective Event Management Strategy that Drives Results

CASE STUDY ON



WHO ARE ADAPTIVE INSIGHTS?

Adaptive Insights, a Workday company (formerly Adaptive Planning) is powering a new generation of business planning. Driving business agility in a fast-moving world, the Adaptive Insights Business Planning Cloud leads the way for people in companies to collaborate, gain insights, and make smarter decisions faster. Powerful modeling for any size organisation, yet so easy for everybody who plans. Adaptive Insights is headquartered in Palo Alto, CA.

Existing Clients:

Some of Adaptive Insights clients include **Rimini Street, Blue Cross, DHL, Infoblox, Power Health Solutions, and Specsavers**

WHAT DO THEY DO?

Adaptive Insights covers the planning, consolidation, analytics, and reporting functions with its Business Planning Cloud. The approach is to replace traditional excel sheets and provide a greater visibility of core business planning data, including financials, and key data metrics. The Adaptive insights Business Planning Cloud enables a comprehensive set of cloud-based software solutions supported by a powerful, in-memory technology platform that enables functional and company-wide business planning and built in analytics at a very large scale.

THE CAMPAIGN

Matt Cowan Prospecting ran an initial B2B lead management campaign in early 2018. They were tasked with finding several attendees to attend the Adaptive Insights events across multiple regions including Auckland, Brisbane, Melbourne, and Sydney. The goal was to help drive attendees to each of the events in a timely fashion, making sure that the calling was strategically setup to cover each event date throughout February, March and April.

Campaign Execution

Initially Adaptive Insights were referred over to Matt Cowan Prospecting from a joint partner of both parties. The initial discussion was very positive, with Matt Cowan Prospecting and the Marketing Manager working together to create a unique tailored value proposition that suited the core business objectives, and culture of Adaptive Insights.

Setting up for Success

There were several critical parts to the campaign management that needing addressing first, including the event management process, lead distribution, and email management which needed to match the Adaptive Insights strict internal processes. - These are outlined below:

Deep Diving into the Value Proposition

Adaptive Insights provide several unique solutions within their Business Planning Cloud offerings, so it was

critical for Matt, and his team to spend quality time understanding the key benefits that the value proposition provides to Adaptive Insight clients. We needed to understand why Adaptive Insights' clients chose to use and stay with Adaptive Insights as their trusted provider.

Solution:

Matt Cowan Prospecting proposed a detailed briefing, and training session between the Marketing Manager, and a key specialist within Adaptive Insights. Both parties covered the core benefits of each offering, and some of the key challenges that it helps solve, and why clients continue to use Adaptive Insights for its great features, cost, and time savings.

Attendee Distribution, and Management

Once the value proposition was fully understood by both parties, the next phase was to create a process in which Matt Cowan Prospecting could distribute attendees in an efficient and timely manner to the Marketing team. Without a solid process the attendees, email requests, and qualified leads may end up being lost in the transition or followed up too late.

Solution:

Working closely with Adaptive Insights Marketing team, and other key stakeholders, we were able to create an effective strategy to help keep the lead / attendee management and follow up running efficiently. Using an agreed lead distribution method with 'Matt Cowan Prospecting' where qualified attendees were added either by the BDM at MCP, or the marketing team at Adaptive Insights. All call statistics, email requests, and detailed feedback was distributed in a daily report, delivered at the end of each day of calling.

Email Management

Over the duration of the campaign we were expecting several prospects to request additional information on the Adaptive Insights offerings, including the event invitations. We needed to make sure the right information was sent out to each request, the right way, and with speed; getting the emails out to the client in real time was critical.

Solution:

Matt Cowan Prospecting initially proposed the self-management of all email and invitation requests within the MCP team architecture. However due to the internal approval processes at Adaptive Insights for external email accounts we were unable to manage these requests internally. Ultimately, we decided on joint operation, that would involve MCP recording all requests on a daily report sent out at the end of each day. The Marketing team at Adaptive Insights would then send out all the invitations, and request for information within a 24-hour period, ensuring all requests were resolved in a timely fashion.

THE RESULTS

The assignment objectives were to identify and qualify the interest of CFO's and Finance Managers to attend the Adaptive Insights events over a 30-Day period. Our team qualified over 40+ attendees over a 30-day period, including several bonus qualified opportunities from prospects who were interested in the Adaptive Insights Offerings. The team also made over 900 calls, with around 70+ email requests, over the

course of the campaign.

OVERALL ASSESSMENT

After the event management campaign was complete, and evaluated, Adaptive Insights and Matt Cowan Prospecting both agreed that the campaign was a success which exceeded the initial expectations.

REPEAT CAMPAIGNS

Because of the great success of the first campaign, MCP and Adaptive Insights continued onto other projects, including a tailored B2B Lead Generation project, where Matt's team continued to generate more results for Adaptive Insights. We are currently working our 3rd project with Adaptive Insights, once again helping the team to qualify new attendees for a new set of events in September, October, and November.

THE FUTURE

Adaptive Insights and Matt Cowan Prospecting continue to build on their relationship, with plans to run additional campaigns later this year around B2B Lead Generation, by targeting existing, and new markets for the Adaptive Insights team.



Adaptive Insights (A Workday Company): The Worlds first business planning cloud

"I have had the pleasure of working with Matt and his team for nearly a year now, and we have had great results. Matt's team are extremely professional and detailed and we truly value the open communication, and added care factor. If you are looking for a trusted telemarketing provider that delivers results, I would definitely recommend Cowan Prospecting!"



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