



Objectives:

- Effective client communication
- Customer retention & expansion
- Reach a global audience

Results:

- 250% increase in attendance
- 2845 information downloads
- 3270 visits to 18 booths
- 634 chats and 1753 Messages

“Creating our first Virtual Event with InterCall was a unique and positive learning experience. I believe that many companies will include virtual events in their marketing mix, because they offer a great new way to engage their target audience.”

Linda Roach
VP Marketing
Planview

Situation

Like many other companies in 2009, Planview assessed the potential turnout they would garner from Horizons, their **annual User Conference**. A quick poll showed that due to travel and budget restrictions, many customers would not be able to attend in person. Since their Portfolio Management customers valued and looked forward to the event, the company decided to create its first ever virtual event.

The Horizons team, which included Kimberly Stone, Director of Web and Creative Services for Planview, was tasked with creating an event that was equal to or better than its physical counterpart. Kimberly attended the Virtual Edge conference, met with virtual providers, spoke with companies like IBM and Cisco to gather information, and then selected InterCall as their virtual engagement platform. The marketing and sales teams worked together to develop creative strategies that led them to increase their 2009 user conference attendance by 250% over their physical event in the previous year.

Solution

In order to maximize attendance and make it a great experience for participants, the Planview team incorporated **both virtual and physical** elements. They mailed **welcome packages** to all registrants with agendas, notebooks, t-shirts, and a printed conference guide. They offered discounted registration rates for **larger groups**, which included breakfast or lunch **catering** for those companies gathering in conference rooms for the event. To encourage personal and direct interaction, the company set up more than 250 “Meet the Expert” 1:1 sessions via phone. They also set up **18 virtual booths** to provide easy access to experts and product info. A keynote address from Guy Kawasaki, **50 videos**, 35 customer and Planview presentations, and a multitude of Planview representatives online helped to achieve the success that the company had hoped for.

Results

With attendees from around the globe, many of whom would have never attended the physical event, Planview **exceeded their expected results**. Customers found the graphical interface to be **realistic, easy** to navigate, and **fun** to explore. Planview wanted to **effectively communicate** with their customers regarding their products and solutions. Since the platform allowed Planview to **track in detail** how long their customers stayed at one location, what sessions they viewed, which collateral they took, the company gained additional insight into their customer base.

Kimberly provided this perspective: “We had great feedback from our attendees, and we achieved everything we wanted. While we will continue to run physical events, we will also consider **hybrid events**, incorporating aspects from both the physical and virtual world”. Planview is currently working on their next virtual event.