# Hitachi Solutions



Hitachi Event Management Solution - powered by Dynamics <u>365</u>



### Contents



Hitachi Solutions at a Glance



Challenges and Solution Benefits

Hitachi Event Management Solution overview







**Challenges & Solution Benefits** 





### Hitachi Event Management Solution

► Challenges

How we address these challenges







Dependency on Multiple Systems causing difficulties in Event planning & execution



Weak Scheduling and absence of system intimations consumes more human effort





Difficult to take Quick and Effective Decisions due to lack of real-time analytics



Difficult to track stake-holders' accountability due to limited system capabilities of approval, validation and workflows

#### Integrated Tailored Solution

Collaboration with legacy systems, unified Event View, Portal Managemnt, seamless access of information



#### Improved Event Scheduling and system automation

Event Financials Resource Scheduling Event Calendar Procurement Management





#### **Enhanced Decision Making capability**

Real-time dashboards, Analytics & reporting, Integration with BI tool



#### Better Process Monitoring

Workflow Management SLA Management Assignment Rules & Approval mechanism



## **Event Management Solution**

Get a complete view of Attendees, Organizers and Interactions Improved operational capability by optimal use of resources Higher Event performance by Effective engagement

### Revenue Maximization

Higher response rate, monitor Sales pipelines, track quotesorders- invoices, quicker sales closure

#### Advanced Event Management

Better planning, defined ownerships leveraging workflows and approvals, Personalized bookmark

### Operational Flexibility

Integrated technology platform, collaboration with ERP, engage attendees & analyse event impact

### Relationship Management

Intelligent Customer interface, Vendor Interaction collaboration, Individual specific notification



### Hitachi Event Management Solution Overview



### Hitachi Event Management Solution

Solution Overview

Module wise
Functionalities



#### **Event Management Solution Overview**



### Module wise functionalities

#### Organizers Request Booking & Management

### <u>Promotional campaigns addressing event</u> <u>organizers</u>

- ✓ Segmentation of campaign audience
- ✓ Multi-channel campaign planning & execution
- ✓ Monitor campaign budget and expenses
- ✓ Define campaign milestones
- ✓ Distribute Email/ SMS with 'Event Request submission' url
- Event Request Submission by organizers
- ✓ Event requirement submission by Organizers
- ✓ Registration of interested organizers details for future communications
- Registration of 'Event Booking Request' details, such as Event type, timeline, expected no of attendees and additional services required
- ✓ Send acknowledgement email on successful Event request booking

#### **Event Booking Request Processing**

- Stage by Stage **Business Process** for the system users for **Booking Request processing**
- Categorization of Event booking requests by type
- Event Planner assignment mechanism based on employee skill-sets and Event type
- Validation of Event booking requests
- Qualification of **Booking request** to **Prospect** in CRM
- Soft-Booking of Event:
- ✓ System maps Booking Request under the newly created Prospect
- Allocation of facility, human resources & equipment based on organizer's requirements
- ✓ Capture detailed Event requirements for further Event planning

#### Prospective Event Organizer Management

- Defining Sales stages, on-board Sales team, auto creation & allocation of Sales Activity, generate
   Sales funnel
- Business Process and Workflow driven prospect follow up and Sales-Team management
- Defining Event pricing and allocate service
   packages as per the event requirements
- Create and manage Sales quotations with multiple versions, capture organizers approval on quotation
- Sales Order management and confirmation of Facility and Resource allocation
- Collaboration with Accounting/ ERP system,

capture Invoice & payment information in CRM

• Sign Contract with Organizer

### Module wise functionalities

#### **Event Management & Execution**

#### Organizer's Event Planning & Approval

- Creation of Event Plan and defining Event activities (event milestones)
- ✓ Defining sub-activities under event activities
- ✓ Creation of Work Orders for Event activities
- ✓ Intelligent scheduler to assign available facilities and best fit resources

#### • Capture Purchase Quote & Order in system

- ✓ Request vendor for event activity
- ✓ Creation and approval of Purchase quotation with multiple versions
- ✓ Capture Purchase order details and map selected vendor for the event activity

#### • <u>Marketing initiatives and promotions for the</u> <u>event</u>

- ✓ Multi channel communication to address interested event attendees
- ✓ Configuration tool to create Event Registration Page.
- ✓ Publishing Registration Page as Social Media post. Capturing of 'Like' & 'Share' of Social Media posts as prospective attendees.
- ✓ Publishing Registration page's url in corporate website

✓ Distribution of Event Registration Page's url via sms/ email and capture registration details as prospective attendees

#### • Execution of Event

- ✓ Provide mobile capability among resources to update real-time Event activity execution status
- Capture event visitors' attendances and track their feedbacks
- ✓ Share list of event visitors/ attendees with event organizer

#### • Event Dashboard & Performance report

- ✓ Events' outcome dashboard
- ✓ Event performance report

### HITACHI Inspire the Next

## SOLUTION ARCHITECTURE

**O Hitachi Solutions** 

© Hitachi Solutions, Ltd. 2019. All rights reserved.

CRM DYNAMICS 365										
Sales Process					Event Planning & Operations					
ENQUIRY	QUALIFICATION	BOOKINGS	PROPOSAL		DER	FUNCTION SCRIP	TING SERV		WORK ORDER	
<ul><li>Lead Assignment</li><li>Event Type</li></ul>	<ul> <li>Emails</li> <li>Response from Organizer</li> <li>Response from Portal</li> </ul>	<ul> <li>Calendar Mgmt.</li> <li>Assign to Diary team</li> <li>SLA</li> <li>Notifications</li> <li>Automatic Event Creation</li> <li>Create Booking</li> <li>Soft Booking</li> </ul>	<ul> <li>Proposal Mgmt.</li> <li>Apply Discounts</li> <li>Approval Workflow</li> <li>Generate Proposal Document</li> <li>Digital Signature Request</li> </ul>	<ul> <li>Order Mgm</li> <li>Confirm Book</li> <li>Booking Orde Intimation</li> <li>Intimation to Planning Team</li> <li>Planner Assign</li> </ul>	ings r	<ul> <li>Event Planning</li> <li>Products &amp; Services</li> <li>Department w planning</li> </ul>	from • Link \ vise • Add F	Function•/enue•Packages•and Time•	Auto Create Product / Package Date & Time Assign to Dept. Open / Close Status Update	Accounts Receivable General Ledger
ि चंड्र Calendar						5 5 5 6 7 7 7				
CASE MANAGEMENT										
Track iss			Record interactions Share Knowledge base Route case			epts. SLA mgmt.				
CUSTOMER PORTAL										
Registration & Log-in Sub	omit Enquiry Order Items &	Services Events & Booking	ngs Proposals & Floor Plans	Event Function	DTCM Permit Lir	nk Pay Online	Organizer Profile	Create Appointments	Meeting Requests	
Power BI Dashboards   Analytics			MS SKYPE for Business Click 2 Call   Customer Interactions			Outlook Email tracking		SharePoint Iments   Workflow Mgm	nt.	

#### **INTERFACE LAYER**

# HITACHI Inspire the Next

