



CUSTOMER SUCCESS STORY

Driving efficient global event program growth at Neuberger Berman

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Neuberger Berman is an investment management firm founded in 1939 with a focus on delivering strong investment results for clients. They prioritize deep fundamental research, investment insight, and continuous innovation to serve their clients. Rose Pasqua Strickland, Vice President - Event Manager, and Donna Gambale, Vice President - Event Manager, work closely with a small team to differentiate Neuberger Berman within the marketplace through over 360 annual events, ranging from small dinners to large, multi-day conferences.

360+

ANNUAL GLOBAL EVENTS

78,000+

REGISTRATIONS MANAGED
IN THREE YEARS

50%

AVG. TIME SAVINGS WITHIN
EVENT MANAGEMENT PROCESSES



Revolutionizing Event Management at Neuberger Berman

Both Donna and Rose have helped shape Neuberger Berman's expansive event portfolio over several years. "I've been at the firm for over 27 years," offers Donna. "When we started, everything was manual, from taking RSVPs manually to managing everything in an Excel sheet." As the volume of events increased, they recognized the need for automation and began exploring internal solutions, but found them to be time-consuming and complicated to use. Moreover, they realized the need to better track event ROI and streamline reporting for stakeholders. "Folks wanted data faster, so we began our search for an event tool that could do everything we needed," Rose says.

At the time, they lacked a formal database to assign, track, and report on their global event portfolio. Inconsistent processes due to a lack of a formal request form resulted in delays for event approvals and execution, as well as issues managing event budgets. There was no central event calendar or centralized reporting structure to accurately capture the scope and impact of their events program. In addition, lead generation was not optimized due to disparate reporting methods. "All of these pain points were manual processes that took away valuable time from our team when planning events," notes Donna. "Being a team of three, time management and efficiency is critical to our success."

They needed one system to manage all data and reporting globally. They also sought to better define and automate internal processes for increased efficiencies and consistency across the business. Importantly, their chosen event management platform had to be user-friendly while still offering robust, flexible capabilities. "It had to be simple enough to use because we're not coders, and Cvent seemed like the perfect fit because we could manage it ourselves," Rose explains. The automation and ease of use provided by Cvent solutions helped evolve their highly manual processes, allowing them to create invitations, RSVP reports, surveys, and event websites autonomously.



Fostering Expertise in Cvent Event Technology

As Rose and Donna's small team deepened their experience with event technology, their proficiency grew. "As we became more proficient in using Cvent, we were able to turn around registration pages, websites, email invitations, and so on really quick," Donna says. Rose agrees, noting that they now consider themselves Cvent "super users." They can now easily self-manage the tool, creating additional efficiencies for their busy team. Donna adds, "It's a really easy tool if you're in it every day, and your skillset just grows and grows as you use it."

Once they felt comfortable with the established capabilities of the Event Management platform, Rose and Donna began looking at expanding their solution set. "Cvent was easy to use and it provided the resources that we needed at the time, but we also saw there was room for growth," explains Rose. "As our events grew, we started to see we needed more of the platform." After attending the Cvent CONNECT industry conference in 2018, Neuberger Berman realized the full potential of the integrated Cvent platform. This experience sparked a renewed sense of excitement as they sought to adopt new technologies, soon after introducing OnArrival, the Mobile Event App, and other solutions to their internal clients.



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DONNA GAMBALE
Vice President - Event Manager

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These solutions proved to be highly successful at various high-profile events. For example, at the Dyal Alternatives Summit, they needed an efficient check-in solution for 600 attendees with different registration types. With OnArrival, they were able to check in all attendees within the first hour of the event without any queues. They created a fully contactless check-in experience where attendees could scan a QR code and receive their badge printed on-demand. Rose explains, “It’s a self-serve tool that helped eliminate long lines, and we also implemented the planner alerts to keep our internal clients aware of check-in progress, all of which created a smoother experience for our attendees, our team, and our internal stakeholders.”

Additionally, at the Museum of Modern Art event in 2023, OnArrival facilitated the smooth check-in of 650 attendees in 15 minutes. Being able to print badges on-demand provided further efficiencies for the internal team while avoiding needless waste. At a Private Equity Annual Meeting, they were able to manipulate seat assignments in real time while printing badges onsite, which was imperative for VIP tables. The flexibility of the OnArrival solution ensures the effectiveness of streamlining event check-in processes.

As Neuberger Berman integrated additional solutions into their product suite, they were able to centralize their data within a single source of truth and eliminate the need for multiple technology solutions. For example, adopting Cvent’s Survey solutions allowed Neuberger Berman to integrate survey feedback directly into their event management process without needing to sync data between multiple platforms. “We were previously using SurveyMonkey, and that created a problem with two systems that didn’t connect,” explains Rose. “We were having to export an Excel spreadsheet and manually send it to stakeholders in another platform, and now we can just do it all right in Cvent.”



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ROSE PASQUA STRICKLAND
Vice President - Event Manager



◆ Centralizing and Scaling Event Program Success through Strategic Meetings Management

By the end of 2019, the team of three was managing 200 events and faced challenges in providing robust reporting to senior management. This included annual event spend by business unit, event count by business unit, estimate versus actual spend for all events, and compliance attendee reporting. They were also struggling with event assignment and scheduling as their program expanded globally. Rose notes, “At first we were just using the Cvent platform for our team, but this need for faster automation and having everything in one place necessitated a broader solution.”

Implementing Cvent’s Strategic Meetings Management (SMM) tool was the answer. They created a unique workflow within the tool specific to their firm and their event needs to help centralize and scale their overall program. This included the automated Meeting Request Form (MRF) with single sign-on for all employees, several layers of budget approvals using the Budget module, automated notifications, lead generation data, and reporting through a centralized Access Portal.



Access Portal provided their internal team visibility into relevant data and reports. “People wanted data immediately, so now we’re now able to collect the data in one shared location, keep the event process moving, and respond in a timely manner,” says Rose.

This centralized hub houses Meeting Request Forms, event reports, survey data, and much more. They’re also able to provide access and visibility on an individual user basis so each stakeholder sees the reporting and analytics that are most relevant to their needs.

Ultimately, Access Portal makes it easier for non-Cvent users to view the real-time data they need to maximize the effectiveness of their meetings and events program. They can also now capture and centrally store all important meeting information in Cvent, creating a single source of truth for their entire events portfolio.



Delivering Data-Driven Business Decisions

To streamline lead generation for their sales and marketing teams, Rose and Donna also incorporated the Salesforce integration. This creates a seamless dataflow across their event lifecycle, allowing them to automatically sync contact lists and updates and eliminate the need for manual labor as well as the capacity for human error. Through these integrations, they are able to track marketing engagement and overall campaign performance. They can automatically sync contact updates and activities as well as automate task and opportunity creation within Salesforce.

Donna adds that arming their teams with this data has ensured that “Cvent has a name for itself at our firm.” She explains that the team has become the go-to resource for all things meetings and events. “We have an initiative called ‘Actionable Insights,’ which is collecting data on client engagement,” she explains. For each event, they require a form to be filled out within the Meetings Management tool that allocates which product the event is connected to. She notes, “This allows us to better gauge the interest of our clients around certain products, which results in real leads and real interest.”



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The results have been impressive. Stakeholders now have a more professional experience with a standardized form and process for event data, approvals, and budgeting globally. Leveraging these integrated solutions has helped increase consistency and accuracy in data collection and reporting, allowing for proactive information sharing with stakeholders. The event assigning process has been reduced by one day per week, event budgets are approved 50% faster with the automated approval system, and budgets are reconciled within 30 days of event closure, compared to the previous standard of 45-60 days.

Real-time updates to event calendars have replaced weekly team meetings, saving valuable time. Moreover, the use of OnArrival for check-in and planner email alerts enables real-time check-in information and session attendance for internal clients. Final attendee lists are now available immediately after an event, rather than waiting for 48 hours. Stakeholder feedback has been extremely positive, with internal stakeholders appreciating the unified system approach.



Growing Neuberger Berman's Global Event Program

Since implementing Cvent in 2012, Neuberger Berman has experienced significant improvements in their processes and procedures. They credit their partnership with Cvent as a key resource in that success. “Cvent support has been a critical resource for our team and we would never be able to implement these processes internally as it would take too many manpower hours, time, and money away from our firm’s day-to-day business,” notes Donna.

They have since become a leader in their industry and are now able to provide solutions for their internal clients worldwide. “Based on the success in the United States, we have launched SMM and other Cvent solutions globally and the feedback has been overwhelmingly positive,” Rose adds. They have expanded to both the EMEA and APAC regions, and aim to continue growing their global program in the near future. Donna insists that the quality of their reporting and reliability of the data is one key to their program’s strategic growth. “Our stakeholders are relying on us to be the firm’s reporting for all events globally, so Cvent continues to serve us well,” Donna says. “We’ve built our credibility with regards to data and reporting. They trust the information we’re giving to them.”



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Both Donna and Rose believe having event professionals included as strategic partners within the business is vital to the success of the larger enterprise. “Event planners finally have a voice at the table” insists Rose. The influence of meetings and events on overall business success is clear. For example, she says, “One business in particular is now using cross-event reports as part of their compensation, so advisors have to meet certain thresholds of client participants and that goes into their compensation numbers.”

As Rose and Donna continue to scale their global events program, they credit event technology as an important component of their team’s success. “The only way we’re able to do the number of events that we have is because of the automation, and it really shows you the power of the Cvent platform” insists Rose. She adds that the use of this technology in powering their events program clearly impacts the business on a strategic level, saying, “It’s because we’re able to provide these data points and show ROI that we’re able to show how important our events are to business success.”





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

Cvent provides easy-to-use, integrated technology solutions to maximize the impact of meetings and events of all sizes. We help organizations plan and market events, execute onsite, engage audiences, and measure and analyze results.

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