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## Tech Demo: ePlannerPro

Christopher Velez  
Sales Executive at ePlannerPro

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## Summary

The ePlannerPro Tech Demo session presented by Christopher Velez, a sales executive at ePlannerPro, focused on showcasing the capabilities of the ePlannerPro meeting automation platform. This platform is designed to streamline the meeting scheduling and management process for event organisers, particularly those involved in trade shows. Velez emphasised the chaotic nature of manual meeting scheduling, highlighting the common use of multiple point solutions such as spreadsheets and CRMs, which can lead to scheduling conflicts and inefficiencies.

Velez described ePlannerPro as an integrated out-of-the-box solution that consolidates all aspects of the meeting engagement process from start to finish. The platform handles scheduling, management, and analytics of meetings, providing real-time updates and notifications. It integrates with popular systems like Salesforce, Microsoft Dynamics, Marketo, HubSpot, Eloqua, and event registration software through an open API, ensuring seamless data synchronisation across all tools.

During the demonstration, Velez showcased the user interface of ePlannerPro, illustrating its scalability for any number of events and users. He explained the platform's two-way engagement system, allowing organisers to reach out to clients and prospective clients to book meetings, as well as enabling attendees to request meetings. ePlannerPro is customisable and configurable, allowing users to tailor the platform to their specific needs, including data collection and meeting request approvals.





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The platform offers intuitive topic mapping, suggesting the most relevant contacts based on the meeting subject, and supports bulk uploads of existing client databases. Velez highlighted the flexibility of the platform in terms of rescheduling and managing meetings on-site, with features like drag-and-drop adjustments and capacity limits for meeting rooms. The mobile app version of ePlannerPro ensures that users can manage meetings efficiently on the go.

Velez also stressed the importance of data collection and reporting within ePlannerPro, noting that it provides pre-made and custom reports to analyse meeting attendance and engagement. The platform allows for real-time access to reports through quick links, facilitating timely decision-making and follow-up actions. He underscored ePlannerPro's ability to drive meaningful meetings that contribute to pipeline development and revenue generation.

Concluding the session, Velez invited attendees to visit the ePlannerPro stand for a deeper dive into the platform, emphasising its benefits in saving time, money, and enhancing profitability. He encouraged attendees to leverage the platform for their event management needs and offered further engagement with his team for personalised demonstrations and discussions on how ePlannerPro can cater to their specific requirements.

# Takeaways

## Integrated meeting automation

ePlannerPro consolidates all aspects of the meeting scheduling and management process into one integrated platform. This eliminates the chaos of manual scheduling and multiple point solutions, providing real-time updates and notifications. The platform's integration with popular systems ensures seamless data synchronisation.

## Customisable and scalable

The ePlannerPro platform is highly scalable, capable of handling any number of events and users, and is customisable to fit specific needs. Users can tailor the platform's data collection, meeting request approvals, and topic mapping features to suit their requirements. Its mobile app version allows efficient on-the-go management.

## Data-driven insights

ePlannerPro emphasises the importance of data collection and reporting, offering pre-made and custom reports to analyse meeting attendance and engagement. Real-time access to reports facilitates timely decision-making and follow-up actions, driving meaningful meetings that contribute to pipeline development and revenue generation.



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