

## **Cvent Flex | How to Transition** <sup>[1]</sup>

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eComm is rolling out Flex in early 2020. All Cvent users will be invited to training sessions to assist with your transition.

There is a lot to consider before jumping into Flex. Follow this easy guide to determine how to successfully transition.

### **I** **Involve your Team**

Creating a quality event from scratch takes time and attention to detail. It helps if you can get multiple people from your team involved to brainstorm, provide feedback, and test your first event.

To help your team understand Flex's potential, you can share Cvent's [introductory video](#) <sup>[3]</sup> and [showcase](#) <sup>[4]</sup> along with custom CU templates that are available.

[Flex Intro Video](#) <sup>[3]</sup>

[CU Templates](#) <sup>[5]</sup>

[Flex Showcase](#) <sup>[4]</sup>

### **Plan**

**Y**ou'll need to consider many variables to determine the correct time and pace of transitioning your events from standard to Flex. Here are some things to consider when prioritizing which events to transition first:

#### **Available Features**

Cvent is constantly building and improving upon Flex to make sure it's the best event management software out there. [Keep visiting this page to see what's included in the latest update](#) <sup>[6]</sup>.

- *Are there any features you require that are NOT currently available? You'll need to wait on migrating these events.*
- *What features are you excited about adopting that are new with Flex?*

## AVAILABLE FEATURES <sup>[7]</sup>

### Resources

The amount of time and effort it will take to transition to Flex highly depends on your unit's resources. This is the time to have honest conversations about your team's goals and the allocation of resources needed to accomplish them.

- *Who is involved in your Cvent Flex transition?*
- *Who is primarily responsible for creating your unit's first Cvent Flex event?*
- *Is this the right time for your unit to prioritize migrating to Flex? If not now, when?*

### Complexity

eComm will provide you with CU Branded templates to clone, but it will be your responsibility to modify the template to encompass your event's custom features and registration process. It's best to tackle a simple event your first time in Flex.

- *Which of your events is on the simpler side and would make a good transition to Flex?*

### Launch Date

Creating your first Flex event will take time to configure and test. You should **project no less than one month** to create your first Flex event. Do not fail to include the 1-3 days your eComm specialist requires to approve your event before it is launched.

- *List your upcoming events and their desired launch date that provides you more than one month to prepare.*

### Learn Flex

Complete new user Flex training <sup>[8]</sup> to start. Once you have the basics, there are numerous resources to take your Flex skills to the next level <sup>[9]</sup>.

Flex Basics <sup>[8]</sup>

Additional Cvent Flex Resources <sup>[9]</sup>

### Create Event

Start by cloning a CU Branded template and modify it to encompass your event's custom features and registration process.

CU Branded Templates <sup>[10]</sup>

## Test!

Involve your team in testing. It's a great way to get feedback before launching the event and opening registration to real attendees.

## Monitor & Improve

Track how the transition to Flex has been received and identify areas for improvement.

Schedule a lessons learned session with your team soon after your first event concludes. Brainstorm with your team to find real ways to remedy any problems and put your solutions into place! Here are some questions to drive conversation:

- What worked well?
- What didn't work well?
- How can we improve things for next time?
- Were there any surprises leading up to or on the day of the event, both for the attendees and the event staff?
- Could any event information have been better distributed?
- Was your staff informed of registration counts as the event date approached?
- How was your attendee vs. no-show rate?
- Did attendees enjoy their event experience?
- Were you able to check-in attendees quickly?

## Related Content

- What is Cvent Flex? <sup>[11]</sup>
- Should I transition to Cvent Flex? <sup>[12]</sup>
- What are the available features in Cvent Flex? <sup>[13]</sup>
- Where can I see some examples of Cvent Flex events? <sup>[14]</sup>
- Is there available training for Flex? <sup>[15]</sup>
- What else should I be asking about Flex? <sup>[16]</sup>

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