

SUCCESS STORY



NEEDS:

- Find a solution that helps manage budgets within a cost recovery department, and can synch with overall University accounting package
- Book rooms for meetings, events, camps, etc. at different campus locations
- Allow students, faculty and other groups to schedule services to ensure event success

SOLUTION:

Event CRM, Booking, Event Management, Registration, Speaker & Abstract Management, Catering, Audience Participation, Inventory, Membership, Personnel Management, Accounts Receivable, General Ledger, Query & Reporting

University Finds Ungerboeck Software Expands as Their Needs Increase

THE CLIENT

Duke University, located in Durham, North Carolina, hosts dozens of conferences, meetings, special events, and performances, throughout the year. In addition to scheduling meeting rooms for student groups, the event management department offers comprehensive services including meeting planning, special events, and audio/visual support to academic, professional, youth and athletic organizations. Because the event management department is a cost recovery operation, it is responsible for generating revenue while supporting the educational mission at the school.

THE OPPORTUNITY

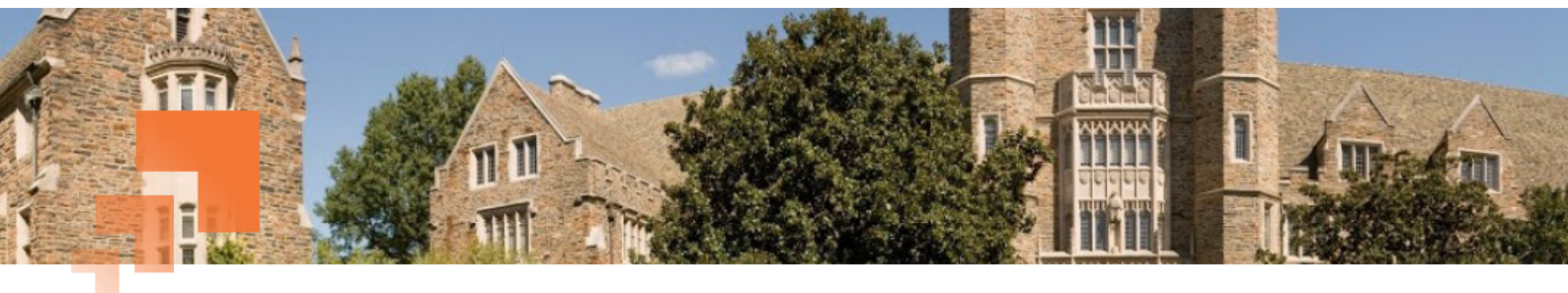
Prior to 1996, different units within the event management department were working as individual business units, but often drawing upon the same resources. When Chuck Catotti, who had worked within several of the units throughout his tenure, was promoted to the director over the entire event management department, he knew some of the limitations the organization had by not centralizing information. "I went through the whole department, unit by unit and talked through their procedures and we created a comprehensive process map." Catotti explains. "From there we created a questionnaire and used it to evaluate a number of different software companies."

Through the discovery process, Catotti and his team knew they were looking for a comprehensive solution that could help them manage registration, inventory, labor scheduling, room booking, invoicing, accounts receivable, and credit card processing. At the time, Catotti was apprehensive about what he'd find in the marketplace, "I doubted that we'd be able to find anything like that, but the more we learned about Ungerboeck, the more it seemed ideal."

THE UNGERBOECK SOLUTION

The most potentially impactful aspect Ungerboeck Software offers that Catotti couldn't find in other event and venue management software packages is the fully integrated, event specific financials. "There were the modules that seemed to hit all the buttons we were looking for, the thing that differentiated Ungerboeck was the strength of the financial piece," says Catotti. The event management department invoices customers, charges credit cards, or withdraws funds from university accounts. Ungerboeck Software allows for each of these types of payments, and lets the event management group export accurate financial data directly to the university's overall business management system.

Because the department's financial information is stored in Ungerboeck Software, Catotti can more easily track down data that helps him run the department. "When I write reports and compare the university general ledger against the financials we track in Ungerboeck, they'll match to the penny. It's been basically 100% accurate and that's an integration piece that's been great for us."



After adopting Ungerboeck Software for the event management department, Catotti was able to identify another area where the solution could work effectively for the university. “We have a marine lab in Beaufort, North Carolina that, in addition to traditional student use, runs essentially a conference business.” Catotti was asked to consult with the marine lab because the event management department is also in the business of managing food, booking rooms and planning events. “What we found was a really complicated system of spreadsheets. Some were linked by fields so they would sort of flow together. After seeing everything they were doing, I quickly realized they could do it all in Ungerboeck, so we set up a new organization within the software, that included the marine lab space and resources, trained the staff on how to use it and went live.”

The shared software allowed the university to operate another revenue generating department at the marine lab without the additional cost of setting up a separate business office. The marine lab is able to manage their event booking and resources through Ungerboeck, and Catotti’s team at the main campus acts as their business office by processing invoices and managing accounts receivable.

Over the years, Catotti says they’ve adopted new components of Ungerboeck Software in order to meet their customers needs. “We went live with online booking a little over a year ago and we’re averaging around a hundred bookings a month that way,” explains Catotti. “Although that does save us time, our push was more directed at customer self service. Our customers, especially students, when they finish a meeting during non-business hours – even as late as midnight – they want to be able to go online and find a space that’s available for an event they’re planning on the date they want. Ungerboeck let’s them do just that.”

In addition, Duke has found that online registration allows them to offer additional services to customers. “We’ve added a lot of clients and we offer different pricing schemes for different conferences that we support, whether it’s per participant registered or a percentage of their gross, and online registration allows us to capture revenue appropriately.” Catotti also says online registration frees up staff, lets participants register at times that are convenient for them, and allows Duke to analyze data to understand where revenue is coming from, make adjustments to pricing, better manage costs, and manage growth.

After more than a decade and a half with Ungerboeck Software, Catotti says not only is he satisfied with the functionality of the product, he appreciates the partnership with the company. “My IT department supports multiple products and they think Ungerboeck support does a great

job. We’ve been satisfied with the continual enhancement of the product. When we need training, we’ll set up a conference call or a web session and they’re great.” Another benefit Catotti has found working with Ungerboeck is that you never have to license the software again after your initial purchase, “We’ve seen from other companies where that isn’t the case.”

ABOUT UNGERBOECK SOFTWARE

Ungerboeck Software is the world leader in end-to-end venue and event management software for conventions, exhibitions, conferences, associations, universities, stadia, arenas and theaters. For most organizations, Ungerboeck Software delivers the capabilities of three to five separate software packages at a fraction of the cost including room scheduling and conference registration, CRM, booth sales, booking, CAD floor plans, budgeting, event management, operations, financials and more. Available in 6 languages, Ungerboeck software drives increased revenue and decreases costs for over 40,000 event professionals in 50 countries.

Ungerboeck supports its worldwide client base from its world headquarters in St. Louis, Missouri and regional offices in Germany; United Kingdom; France; Australia; China; and Hong Kong.

For more information, please call one of our offices or visit ungerboeck.com.

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