Venue Success Guide
# Table of Contents

**About This Guide** .................................................................................................................................................................2

**Getting Started** .................................................................................................................................................................3  
  * Starting as a New User ..........................................................................................................................................................3  
  * Starting as a Venue Administrator .................................................................................................................................4  
  * Helpful Hints for Venue Administrators ........................................................................................................................5

**Getting Help** ........................................................................................................................................................................6  
  * Who’s Who ..........................................................................................................................................................................6  
  * Accessing Support ..............................................................................................................................................................7  
  * Support Tips .......................................................................................................................................................................8

**We’re Here for You** ..................................................................................................................................................................9
Every organization handles group business differently: different needs, different goals, and different ideas of success. Cvent has been working with all types of venues since the start of the Cvent Supplier Network in 2008. In the process, we’ve learned a lot and we’d like to share the best ways to capitalize on our software with you.

In this guide, we cover everything you need to succeed on the Supplier Network. Learn how to get started. Understand what it takes to be a great Venue Administrator or a knowledgeable user. Explore the best methods for contacting support. Whether you’ve just upgraded your free account or you’ve been partnered with us for years, we’re here to give you the latest information on how to use our software and services to keep your business running efficiently.
How you begin depends on what you’ll be doing in Cvent. If you’ll be a Venue Administrator—responsible for user management, account upkeep, and ensuring your coworkers get trained—scroll down to the “Starting as an Venue Administrator” section. All other users should follow the steps below.

Starting as a New User

1. Meet your Venue Administrator. Know who’s in charge of your organization’s Cvent account. Discuss with them what you’ll be doing in the application, so they can ensure you have the appropriate user rights.

2. Log in to your account. You should receive an email with your account details when your Venue Administrator adds you. You’ll have 48 hours to click the link within and log in.

Missed that window? Just go to app.cvent.com, click Forgot your login information? and reset your password.

3. Learn the product. Follow the curriculum outlined in the Cvent Community. We recommend beginning with either CSN Training for Venues I, which will go over the basic proposal creation process, or Maximizing your Cvent Profile, which will cover how to update your planner-facing listing (depending on your role.) Then proceed with the rest of our training to learn about additional timesavers and best practices.

4. Stay informed. Check the community frequently for announcements of new features or scheduled downtime. Also be sure to read the section that outlines your account team. They’re here for you. Capitalize on their expertise.
Starting as a Venue Administrator

1. **Review what you purchased.** Unless specified otherwise, an invoice was emailed to whomever signed the contract. For an additional copy, questions, or upgrades, contact your Account Manager.

2. **Meet with a Client Success Consultant.** After the agreement is signed, a Client Success Consultant will reach out and schedule a meeting. This kickoff call will be the first step in the onboarding process. During this conversation, the Client Success Consultant will review what you have purchased, any creative deadlines, and also what you hope to accomplish with Cvent and set expectations for the rest of the onboarding process.

3. **Know your resources.** The Client Success Consultant will recommend a specific curriculum during the kickoff call. You may also be able to set up a group training for your team. If you’d like a head start, [follow the curriculum outlined in the Cvent Community](#).

4. **Learn from fellow Cvent admins.** Check out tips from our most successful customers on the next page and your admin skills will go from good to great. If you’re looking for more tips, or want to share knowledge of your own, [check out the forums in community](#).
Helpful Hints for Venue Administrators

- **Assign appropriate rights.** You don’t want the marketing intern to be able to turn down your biggest program of the year. Give users permissions based on your organizational structure. When someone leaves the company, remove that user from Cvent as well.

- **Keep current.** Release notes, lists of what’s been changed or added, can be found in the Cvent Community after each product update. You can also check for any downtimes at status.cvent.com.

- **Assign a designated backup.** We’ve found that the best run accounts have at least two Administrators. If possible, someone else in the organization should know Cvent as well as you do.

- **Get certified.** Once you've attended a few training sessions and created a few proposals, you're going to feel like an expert! Make it official by becoming Cvent certified. Learn about the available programs at cvent.com/certification.

- **Budget for the future.** Consider the price of upgrades that might be necessary as your needs evolve. This could include increasing your ad presence, purchasing additional logins, or getting certified.
Who’s Who

Here you’ll have an entire team working to ensure your success. The roles dedicated to supporting your Supplier Network needs, include:

- **Product Consultants** have the deepest Cvent knowledge and form our front-line support team. When you submit a case, open a chat, or call us, a Product Consultant will be the one troubleshooting your issue or answering your question. They are available 24/5.

- **Client Success Consultants** guide you through the implementation and setup of any contract that you have purchased. A Client Success Consultant is committed to understanding the specific needs of your organization. They are available by appointment only.

- **Account Managers** ensure you get the most value out of your account. They handle contract-related questions and requests for additional marketing or functionality. Your Account Manager will also schedule review calls to gauge your satisfaction and success with Cvent.

**Example Questions**

- “How do I upload images?”
- “Where is this RFP in my account?”
- “What do I do to fix this error?”
- “Does using a SpeedRFP button make sense for us?”
- “How should I optimize my 4 Diamond Cvent listing to attract the most planners?”
- “How much does this feature cost?”
- “Can you share our comp set data so we can see how we are performing?”
Accessing Support

When you do have questions, follow the steps below in the order provided to make getting the answers you need as quick as possible:

1. **Search the knowledge base.** Access a library of instructional articles, videos, and frequently asked questions in the Cvent Community. We recommend clicking CSN Supplier on the left to filter by product.

2. **Ask our community.** Get answers or advice from fellow Cvent users in our forums. This content is moderated to ensure all information is accurate and up-to-date.

3. **Open a case.** Fill out the form in the Cvent Community or on the Contact Us page, and you'll correspond with a Product Consultant via email.

4. **Chat.** Message an agent directly in the Cvent Community. A transcript of your conversation will be saved along with your case details.

5. **Call.** Recommended for time-sensitive issues, you can always dial one of our toll-free numbers. Have your account ID and password ready to expedite the process.
Support Tips

To ensure your experience contacting support is as quick and effective as possible, we recommend doing the following:

• **Always provide an account number and user name.** If you don’t know both, click **My Profile** in the top right of your account. Unable to access Cvent? Ask your Venue Admin. No matter how you learn it, be sure to write this information down. Without it our Product Consultants will be unable to pull up your account and begin the support process.

• **Give specifics when filling out the forms for cases and chats.** Avoid generic terms in the description. Include the person, venue, or RFP your inquiry relates to and provide screenshots when applicable.

• **Help us help you.** Most of the time your issue will be resolved with the first interaction, but we may need additional information or your assistance in testing. In some cases, we’ll have to reach out to our development team and potentially other vendors to find a solution.

• **Make sure you’re getting our messages.** Not getting our emails? Check your spam folder. If you want to ensure your organization isn’t blocking emails from support, whitelist our IP addresses.

• **Understand our support boundaries.** We love to help, but there are some things we’re just unable to do. **Become aware of these ahead of time**, so you can plan accordingly.

No matter how you contact support, the Product Consultant logs a case for your reference. You can find it by clicking **My Cases** in the top right of the Cvent Community. Within the case, you’ll find instructions, resolution, and any articles that pertain to your inquiry.
We’re Here for You

Our goal at Cvent is to make managing RFPs simpler, help you respond faster, and bring in more leads with your Supplier Network profile—whether you’re representing a single property or an international chain.

This guide was created from advice given to us by existing customers. Follow the steps within and we’re confident your profile will attract more group business and your bids will top the stack. No matter what, we're here to support you throughout it all.