Eminent Investment Advisor Streamlined Event Management With monday.com Work OS

Watch Our Customized Solution in Action

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Ensuring Success. Always

The Client Profile

The client is an SEC-registered investment adviser based in Boston. Since its inception in 2006, the client has invested globally, focusing on the technology, media, and telecom sectors.

The Challenge-Difficulty in Managing Information Related to Events and Conferences

The client schedules events (meetups, conferences) on a regular basis, but earlier there was no system to keep track of all the events in one place. Everyone in the organization would manage their subset of events on emails, personal notes, and Google sheets. As a result, various teams and individuals were not aligned with respect to the events they participated in. In the absence of clear communication and transparency, these events would often overlap, resulting in the improper allocation of resources or, in other words, complete chaos.

They needed a solution to see the bigger picture across all events and keep all the information in one place.

Lack of a centralized solution to track all events in one place

No proper communication and transparency among teams

Overlap of events and conferences leading to chaos and mismanagement

Inefficient resource allocation for meetups and conferences

The Solution-Customized monday.com Work OS for Event Management

Customized monday.com Boards for Event Management

Damco's consultants carefully assessed the client's requirements and built a solution on monday.com work OS. The solution consisted of various boards to manage daily, weekly, and monthly events and conferences.

Value Delivered-Streamlined Management of Events, Enhanced Cross-Team Collaboration, and Improved Transparency

▸ Damco's solution allowed the client to manage and track all event-related information in one place, keeping them from maneuvering between tedious & bulky spreadsheets, multiple tools, and platforms.

▸ Staying updated about events is easier than ever; the client can now update their teams about upcoming events with just a few clicks rather than constantly updating spreadsheets

▸ The solution allows clients to share their planning processes for conferences with external vendors for instant syncs and updates.

▸ Cross-team collaboration is a breeze; thanks to the solution, the client can easily coordinate with attendees in real-time and manage calendars.

▸ Automating many repetitive processes has allowed the client to slash mundane work and boost employee productivity.

▸ Managing the CXO category calendar became easy to choose from multiple events and attend the high-value ones.

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About Damco

Damco Solutions is a trusted software and IT partner for businesses from different industry verticals spanning across the world. As a reliable monday.com partner, We help teams realize their full potential by building bespoke monday.com solutions, leading to optimized workforce, workflows, and processes. We have empowered businesses ranging from Startups to Fortune 2000 clients with its tech-integrated solutions.

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