

F102: Diving into Strategic Meetings Management Programmes: Quick Wins

Facilitator:

Tracey Wilt, Manager Global Travel & Meetings Management, Xerox

Presenter:

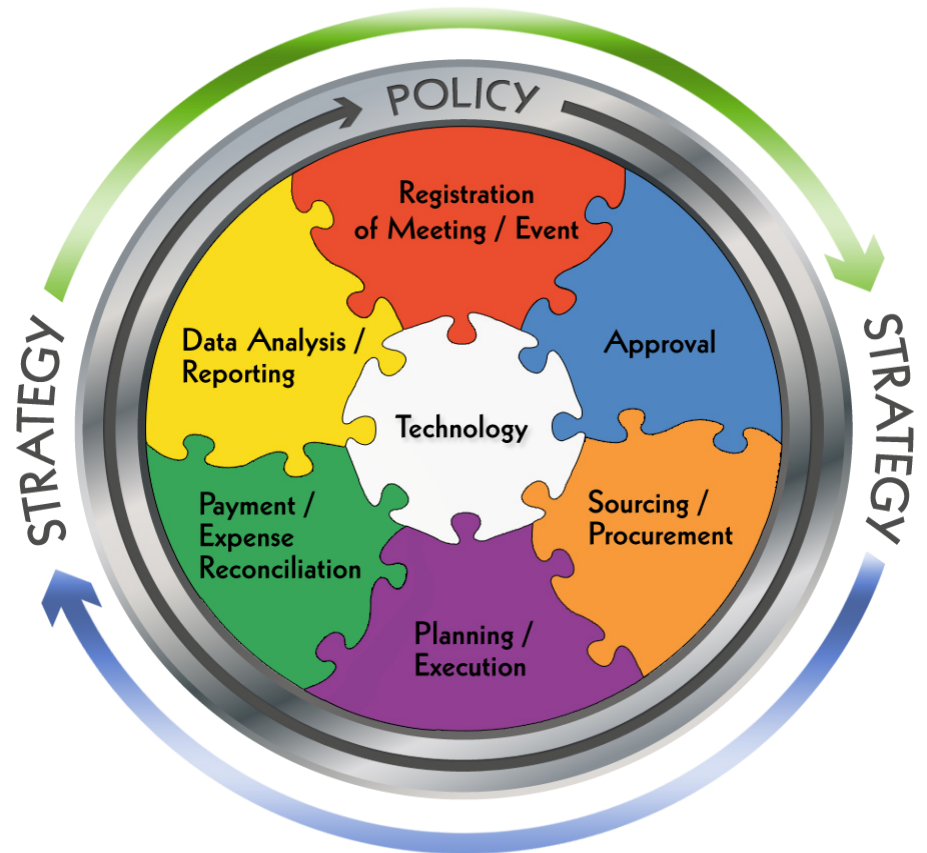
Kari Kesler, KK Strategic Solutions, NBTA Board of Directors

Objectives

- Define SMMP
 - What it is
 - What it is NOT
- Challenges to deployment
- Success factors
- Opportunities for Quick Wins
- Resources and education

The strategic management of enterprise wide meeting related processes, spend, volumes, standards, and suppliers to achieve quantitative cost-savings, risk mitigation, and superior service

Components of a Best in Class Strategic Meetings Management Program (SMMP)



The Science of SMMP

- One program/company
- Driven by strategy which is reflected in policy
- Must contain processes to address each component
- Multi year, phased process driven by continuous improvement
- Capture all activity and link to key business objectives

What SMMP is NOT

- A single planner/group of planners becoming strategic about their events
- A program containing part but not all of the SMMP components
- Strategic Meeting Planning & Delivery (SMPD)
- Meeting Architecture
- Meeting procurement/sourcing

SMMP today

- Many models of success/mature programs to emulate
- Benchmarking becoming available
- Second level strategies being vetted
- Tangible savings numbers worth addressing (25%+)
- Global industry research supports value proposition
- Economic austerity required
- Regulatory requirements abound
- Investment in meetings must be well managed and easily demonstrated

Challenges to Deployment

- Massive scope relative to company size
- Company culture/silo driven mentalities
- Variable nature of meetings/events
- Communication challenges
- Funding for potential solutions
- Lack of SMMP expertise
- Lack of understanding in commodity area
- Other?

Success Factors

- Customized strategy aligned with corporate culture
- Intentional focus on internal stakeholder alignment
- Manageable scope
- Previous success of like initiatives
- SMMP expertise in house/available
- Economic climate
- Other?

Quick Wins

- Register events
- Central approval
- Centralized sourcing
- Contracting process/policy
- Payment process/policy

Registration

- Determine key data points you will need
- Develop “form”
 - Manual fill in/fax or scan/email
 - Intranet based form/submit
- Technology acquisition
- Draft policy and communicate
- Transfer data into database

Central Approval

- Design process to align with business controls
- Determine methodology for approval
 - Electronically via current tech systems
 - Technology acquisition
 - Manually with registration process
- Draft policy and communicate
- Transfer data into database



Centralized Sourcing

- Gather information on current preferred partnerships
- Design sourcing flow
 - Lead comes into process
 - Business requirements are gathered
 - Set expectations on turnaround
 - Set parameters around bidding guidelines by commodity area
 - Design result presentation format
 - Outline final decision and reasons
- Draft policy and communicate
- Transfer data into database

Contracting Process/Policy

- Determine contracting objectives
- Design templates pre-approved by legal
 - Corporate driven agreement?
 - Addendum to supplier agreement?
- Identify resources for process support
- Draft policy and communicate
- Transfer data into database

Payment Process/Policy

- Determine current payment options across enterprise
- Detail preferred payment methods by commodity
- Develop process to obtain access for end users
- Draft policy and communicate
- Transfer data into database

Now . . . use the data to drive additional process improvements, policy refinements, and increase the corporate interest in launching full SMMP

Spectrum of Event Complexity

- Small – medium
- Business focus
- Internal attendees

- Large, high impact
- Incentive
- Mix of business & leisure



SPECTRUM OF EVENT COMPLEXITY

Low complexity

High complexity

Strategy by Event Type

Type of Meeting	Meeting Demographics					Solutions		Approval Requirements
	Purpose of Meeting	Average Cost per attendee	\$ value Of event	# of attendees	Type of Attendee	Ops/ Planning	Sourcing	
Advisory Meeting	Customer focus group, gaining feedback or input into product or process	Company: €2400 Industry:	Any	10 - 80	Current or potential Customers	Requires Planning Support	RFP major Suppliers	Senior Leadership sign Off
Board/ Management Executive	Business focus for specific individuals who exercise administrative or managerial control	Company: €3400 Industry: €3800	Any	30	Board members, high level Management	Requires Planning support	RFP major suppliers	Senior Leadership sign Off
Client/Industry Small	Business focus for distinct group of people associated with a specific group or business line within company	Company: €600 Industry: €500	<€40K	10 - 150	Client or industry in Association with some Internal associates	Turnkey Meeting Solutions	Master Agreements in Place Program Orders only	Senior leadership sign off

Resources & Education

- “Framework for Success” series by NBTA
- Upcoming Strategic Meetings Management Certification (SMMC)
- Global conferences (like this one!) with SMMP content
- Network with like companies
- Hire in expertise from 3rd parties

Questions?

Thank You!

Enjoy the rest of the conference . . .