Creating a Virtual Meeting and Event Strategy

Virtual meetings and events, a critical component to a strategic meetings management (SMM) strategy, expand organizations’ options to communicate, and they broaden a meeting planner’s toolbox of planning solutions.

There is no doubt, virtual meetings are on the rise and will continue to be used more by planners. In a 2011 industry study, almost one-third (30%) of meeting professionals say they will be using more virtual and/or hybrid meetings in the future, an increase of 57% over the 2010 study, when only 13% forecast more virtual events.

But not all perceive the same definition or expect the same services when hearing the term, “virtual meeting” or “virtual event.” By definition, a virtual meeting or event provides for live or archived communications among small to large and local to global attendees. Yet, the three tiers of virtual meetings and events offer different experiences for attendees and require various levels of support to be successful. Various types of virtual meetings and events exist:

Tier 1 - Teleconference, Videoconference and Desktop Applications

The most common virtual meetings are delivered by technologies familiar to most people, such as videoconferencing, Skype, GoToMeeting, Webex, LiveMeeting, etc., and are user-friendly. Often, these technologies are used for meetings with less than 50 attendees and can be quick to set up. These tools have become common in the home and business environment and can be delivered to the attendee through multiple mediums. Some people also consider teleconferences and instant messaging as virtual meeting options, part of the overall virtual experience.

Tier 2 - Webinars and Webcasting

This category of virtual meetings requires some level of expert assistance and supplier intervention, usually because of a higher number of attendees or the level of functionality desired. Some of the same suppliers that offer the first tier of services may offer a more enhanced level of services. Meetings or events using this kind of technology may feature more than 50 people and usually require a couple of days to up to a few weeks to organize properly.

Behind the scenes, the difference between the first and second tier of virtual meetings is the level of technical and planning support needed. While technology support is needed to deliver the content and support the connectivity, a Virtual Meetings and Events (VME) planner provides preparation services such as project management, communications and social media, content development and formatting, rehearsals and reporting. This role may be an internal or external resource, as meeting planners who provide services for face-to-face meetings can also learn to deliver virtual meetings.

¹ 2011 Meeting Professionals International FutureWatch study
Tier 3 - Virtual Events

The third and most complex tier of virtual events requires a high level of expert assistance. The technology supplier will provide an experienced team to lead the development and delivery of the client’s virtual event—whether it is a convention/exhibit, trade show, job fair, expo, symposium, or other type of event. Some virtual events may be 3D in appearance and often provide the most immersive experience for attendees; yet, these events may require months to produce. A VME planner will be needed and may work side-by-side with a virtual event production coordinator.

Why use virtual meetings and events?

Virtual meetings and events can provide numerous benefits to your organization and attendees. Some face-to-face meetings are complemented with virtual meetings, also known as “hybrid meetings,” and some virtual meetings replace face-to-face meetings to reduce the cost of the meeting, broaden the reach to more attendees, or increase the speed to market. A hybrid meeting may reduce a four-day face-to-face meeting to a two-day face-to-face event with virtual meeting components to fulfill the four-day content requirements.

To drive adoption towards using virtual meetings, an organization may want to communicate the benefits of using virtual technologies to its staff so they recognize the delivery medium as a win/win for all involved (and a plus for the environment). Here are some benefits when discussing the need to move toward virtual meetings/events:
## Benefits of Virtual Meetings & Events

<table>
<thead>
<tr>
<th>Provides Better Access to Content</th>
<th>Improves Scalability and Reach</th>
<th>Dramatically Improves Measurement</th>
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<tbody>
<tr>
<td>Allows immediate immersion into visual, listening and participative environments with people who are not nearby; Provides immediate access to subject matter experts, multiple presenters from numerous locations and more spontaneous and immediate decisions in lieu of planned meetings; Provides for replay/archive capabilities for people who are unable to be present or want to replay the on-demand archive; Provides multiple language options</td>
<td>Removes the distance for global workforces, clients and markets; Offers scalability so that large meetings can still &quot;fit&quot; without having to reserve more rooms; Provides for more people to attend trainings and workshops that could not attend based on travel costs; Improves work/life balance and the ability to provide attendees with the option of avoiding business travel when possible; Provides a safe environment for people who may want to discuss topics but are uncomfortable in doing so with an audience in a room or a meeting filled with people they may not know; Provide an anonymous environment to obtain survey results by using VME polling features</td>
<td>Provides for tracking of multiple metrics, including attendance during live and archived sessions, poll/survey compliance statistics, and activity data to track what users actually do within the platform. Improves consistency in branding and marketing. Cuts the carbon emissions and environmental impact of travel; Cuts non-productive traveling and flight time and travel expenses; Reduces telecom costs with a unified communications strategy</td>
</tr>
</tbody>
</table>

### When to use virtual meetings and events?

Virtual meetings and events will provide the best delivery method for many meetings; but they may not be the right answer for all meetings. The answers will help determine whether to go virtual or face-to-face:

1. What is the general meeting type?
2. What is the general purpose of the meeting?
3. What is the expected outcome and how will it be measured?
Virtual Meeting/Event Decision Tree

Virtual Meeting or Event

What is the general meeting type?

Internal meeting
- Convene business meeting
- Program/project management meeting
- Management/executive meeting
- Training program
- Customer/client meeting
- Marketing initiatives
- Supplier meeting

- "Aggressive" approach: Easy to transition to virtual communications
- Move 25-40+% to virtual method for cost containment/carbon emissions reduction initiatives

Potential customer/client meeting
- Recruit or interview people
- Conference/convention
- Exhibit/sponsorship

- "Aspiration" approach: somewhat challenging to transition to virtual communications
- Move 15-25+% to virtual method for cost containment/carbon emissions reduction initiatives

Retreat
- Incentive
- Meeting or Celebratory event (e.g. breakfast lunch or dinner event)

- "Allusive" approach: Difficult to transition to virtual communications
- Move 5-10% to virtual method for cost containment/carbon emissions reduction initiatives

What is the general meeting purpose?

Share information
- Communicate/discuss
- Demonstrate
- Motivate
- Provide subject matter expertise
- Presentation
- Educate

Meet/discuss and view body language/reaction
- Manage to different cultural communication norms
- Build team camaraderie
- Convey sensitive information
- Conduct longer than 4-hour sessions (that cannot be divided into shorter segments)
- Deliver to locations with unstable connectivity
- Offer complex and numerous meeting breakout sessions

Consider virtual technologies to supplement or replace a face-to-face meeting or event; and consider:
- one-way or two-way communications abilities
- security of technology, content, and accessibility
- where are the speakers, SMEs, attendees, etc. (locations)
- how much it will cost compared to a face-to-face and a conference call
- how to convey message
- how to collaborate
- when to conduct meeting (time zones, etc.)
- archival options
- interactivity functionality
- accessibility
- testing abilities
- audit capabilities
- compliance tracking
- limitations
- lead time
- technical support

Consider:
- conducting the meeting or event via face-to-face;
- using technologies that provide for visual and auditory two-way communications methods if a virtual meeting or event is selected;
- designing the content using participatory activities if virtual
- using small group sizes if virtual

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Meeting/Event Types

The most common types of virtual meetings are internal meetings, general business meetings, training programs, ongoing customer/client meetings and supplier meetings. Gaining ground but less common, virtual technologies may be used for important (or new) client meetings, recruiting, interviewing, exhibits, conferences, conventions and sponsorships. Rarely are retreats, incentives or celebratory events delivered through a virtual medium. However, all of these common face-to-face meeting types can be supplemented with virtual sessions to progressively immerse attendees in the meeting experience.

Virtual Meeting/Event Purpose

A virtual meeting is a good option when the meeting sponsor or planner wants to share information, communicate, demonstrate, motivate, offer subject matter expertise, sell, present and educate. In contrast, face-to-face meetings may be better if the meeting sponsor or planner wants to discuss sensitive issues and view the attendees’ body language or reactions, build team camaraderie at the beginning of a project, strive for 100% engagement during presentation of complex topics, deliver to locations with unstable connectivity, or manage multiple cultural norms with some countries that may not be receptive to VMEs.

In place of Travel

The integration of Travel and Video Conferencing helps manage Travel and Meeting expenses and increase ROI on technology investment.

Some organizations include a virtual meeting option on their online booking tool so that the virtual alternatives are highlighted to remind travelers to consider this alternative.

Now, Sabre is offering Virtual meetings capabilities too.

“Sabre Virtual Meetings solves these challenges with an easy-to-use, global scheduling system. Room availability, compatibility, and connectivity are all seamlessly verified, so employees know where to book, what’s available and what to do when they show up to a meeting,” said Suzanne Neufang, president of GetThere and Sabre Virtual Meetings. “Our Virtual Meetings solution also enables public room and partner room access for those companies looking to maximize visual collaboration.”

Sabre Virtual Meetings is the only solution providing enterprise-wide, secure access to private and partner video conferencing rooms as well as a global network of over 4,000 public rooms. Similar to online travel reservations, all options for a given city pair search are provided in a single, secure booking path. Filtered by company policy and room availability that the corporation explicitly authorizes, employees can choose the room options that best meet their business needs.
Measuring Virtual Meeting/Event ROI

A meeting’s content and messaging are more important than the delivery medium. Virtual meetings and events are not about the technology, but rather about bringing together virtual attendees to accomplish a goal. All of the creativity that meeting planners bring to a face-to-face meeting can be repackaged in a virtual environment, albeit, in different ways. Virtual Meeting and Event Planners must learn how to add the human touch to virtual meetings by consciously creating an interactive environment where attendees can engage as though they are mingling in a hotel hallway or meeting room. However, it is very challenging to measure interactivity levels in a hotel hallway or meeting room, whereas in a virtual environment, it is much easier to gauge these informal actions.

Most VME planners need to prove a return on investment (ROI) and should identify the expected benefits and measurements before planning the meeting or event. For the most part, meetings and events are held to communicate, motivate, educate, celebrate, evaluate, generate revenue, or regenerate the workforce through recruiting. Consider the following measurements to calculate ROI for a virtual meeting or event:

**Ideas to Measure ROI**

<table>
<thead>
<tr>
<th>Communicate</th>
<th>Was the communication used and understood?</th>
<th>Measure the effects of the communication efforts. For example, if a business meeting was held to discuss a new project, the measurement could be the success of the project completion as evaluated by the project sponsor.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motivate</td>
<td>Did the attendees change or improve behavior through motivation?</td>
<td>Measure the effects of the improved behavior. For example, if a meeting was held to motivate attendees to use a new policy, the measurement could be the increase in policy usage.</td>
</tr>
<tr>
<td>Educate</td>
<td>Did the attendees learn something that would reduce cost or risk, improve productivity or quality, or generate more sales?</td>
<td>Measure the effects of the education. For example, if a meeting was held to educate attendees on how to use technology, the measurement could be the increase in productivity as a result of using the new technology.</td>
</tr>
<tr>
<td>Celebrate</td>
<td>Did the attendees feel appreciated?</td>
<td>Measure the effects of the perceived value of the celebratory event. Even celebratory events can be held through virtual technologies. Although most planners may not calculate ROI for a celebratory event, it could be done. For example, if a meeting was held to celebrate an accomplishment within a team, the measurement could be the increase in accomplishments throughout the year or the perceived feeling that the attendees had during the celebratory event.</td>
</tr>
<tr>
<td>Evaluate</td>
<td>Did the attendees evaluate the service or product as expected and provide the needed feedback?</td>
<td>Measure the effects of the attendee feedback. For example, if a forum was held to evaluate a product or service, the measurement could be the thoroughness of the responses.</td>
</tr>
<tr>
<td>Generate revenue</td>
<td>Did the attendees generate more revenue?</td>
<td>Measure the effects of the leads or revenue generated. For example, if a virtual expo was held to generate sales, the measurement could be the number of leads generated and the resulting sales from those leads.</td>
</tr>
</tbody>
</table>
Regenerate the workforce through recruiting

Did the organization hire more staff?

Measure the effects of the recruiting and interviewing efforts. For example, if a virtual job fair was held to generate interest in a company, the measurement could be the number of subsequent interviews held or the number hired who attended the job fair.

When measuring VMEs, also consider one or more of these metrics:

- Attendee satisfaction
- Meeting sponsor/budget-holder satisfaction
- Lead time to plan virtual meeting/event
- # of registered attendees (and demographics such as internal staff vs. external clients, location, business unit, company, etc.)
- # of live attendees (to presentations, exhibits, virtual meeting spaces, etc.)
- # of attendees that viewed on-demand archive
- Length of VME
- # of minutes/hours each attendee spent at virtual meeting/event and average per attendee (live and on-demand)
- # of exhibitor booths
- # of leads generated
- # of presentations offered and materials downloaded; average downloads per attendee (live and on-demand)
- # of questions asked and average questions per attendee (live and on-demand)
- # of locations visited and average per attendee
- # of complaint/issues
- # of times technology failed
- % of the Service Level Agreement and Key Performance Indicators met
- # of hours that the meeting required for preparation and delivery services from each VME planner
- Amount of estimated budget, actual budget and variance
- Amount per person to deliver meeting/event
- # of credits awarded (if an accredited program for CPU or other type of credit) and average # of attendees who qualified to receive credits
- If this virtual meeting/event replaced or complemented a face-to-face meeting, provide a cost/benefit analysis of how the virtual meeting reduced overall meeting costs

Capturing VME Metrics

Depending on the type of VME you plan, virtual meeting and event functionality requirements can be simple or complex – similar to face-to-face meeting needs. As a result, it is common to use multiple suppliers. However, that can lead to disparate data collection, especially for large organizations. A VME best practice is to use a central repository for all VME requests, approvals, attendee management, budgeting and reporting so that the meetings organization can report the VME metrics side by side with the face-to-face meeting/event metrics.
Create a VME Strategy

Creating a VME strategy provides guidance for your organization leaders, meeting requesters, internal and external suppliers and attendees. This strategy, supported by change management, addresses how to reserve, who can support and supply, and how funding is managed for virtual meetings. The best strategy includes direction for all three tiers of VMEs, and establishes that strategy development is through a team of stakeholders from IT, procurement, training and development, marketing, travel and meetings management.

One common pattern is that the IT department selects a virtual meeting supplier and then the meeting sponsors ignore the edict and choose whatever suppliers they want. Technology support may be owned by IT, yet the meetings, marketing, and training and development teams should be included to build the virtual meeting environment and culture. Implementing a virtual meeting culture requires a balance from all business units to ensure the success of these initiatives. Usually, the objective is to lower operating costs by minimizing the administration and support by centralizing the function with the meetings department. The virtual meeting management process requires well-managed standard operating procedures, trained services roles, communication, brand the realization of benefits through comprehensive metrics. Technology is only the enabler, not the solution. As such, the management of VME services should not reside in IT.

By centralizing the management of VMEs, you:

- Support the customer by acting as the single point of contact for all meetings;
- Eliminate some face-to-face meetings with a recommended hybrid or virtual approach;
- Reduce the costs of meetings by eliminating or decreasing travel, facility costs and expenses;
- Build leverage with preferred virtual meeting suppliers;
- Ensure consistency and quality in VME delivery;
- Drive adoption through use of subject matter expertise and support services;
- Allow for tracking and measuring volume and spend.

Roles and Responsibilities
Although marketing and incentive efforts appear to be crucial factors in prompting sponsors and participants to embrace VMEs, it is the amount of support that they receive that actually increases their willingness to use virtual meeting applications. A virtual meeting and event governance structure facilitates timely decision-making by the right team, at the right staff level, for seamless services that are delivered to meeting requesters. As such, there are various roles that may be needed for an organization to provide comprehensive VME services. Here are some examples below:

- Information Technology – may manage the relationship with technology suppliers from a contract, support and service level agreement perspective;
- Procurement – may manage the request for proposal and contracting process along with stakeholders from IT, Marketing, Training and Development, Meetings and Events, and Travel;
- Training and Development – may manage tools for e-learning or may have a key stakeholder role in the virtual meetings and events initiative;
- Marketing –a key stakeholder in the virtual meetings and events initiative;
- Finance –a key stakeholder to support virtual meeting and event payments and reconciliations (or this task may be assigned to the meeting requestor or the meetings team);
- Meetings and Events and/or Travel – may manage the service delivery of virtual meetings and events.

When meeting and event requests are generated and surge into the meetings team (internal staff or outsourced), the meeting planner should offer or recommend virtual meetings/events as a viable solution when it is applicable. If a virtual meeting/event is a viable solution, then a VME planner may be assigned.

- Top activities for a VME planner may include:
  - Receives request; adds to VME calendar
  - Consults with the VME Owner/requester on the appropriate virtual meeting technology based on objectives, audience size, locations, playback requirements and budget
  - May act as the project manager and develop project plan
  - Confirm VME budgets, route for approval, and pay suppliers using a centralized payment system
  - Identify resources (content, presenter(s), etc.)
  - Team with face-to-face meeting planners if the VME complements a face-to-face meeting
  - Determine compliance requirements
  - Check technology availability
  - Send a “Save the Date,” and prepare communications with instructions that will be sent to the presenters and attendees
  - Manage, monitor and support the registration; respond to pre-and post-VME questions
  - Plan a backup strategy in case the technology fails (technology may be videoconference equipment, Internet, computer, etc.)
  - Plan the rehearsals
  - Interface with virtual meeting technology company and all virtual meeting sites/participants to ensure they are prepared technologically and psychologically
  - Prepare presenters (and technology supplier if involved) with information for pre-call
  - Test question database, teleconferences, equipment, links, etc.
  - Upload presentations into webcasting tool if applicable
  - Manage live VME; record program
  - Conduct a debrief; and use information to improve current or future VMEs
  - Prepare content for on-demand viewing
  - Distribute VME evaluations to attendees to collect meeting feedback
  - Run reports; manage compliance requirements
  - Provide VME metrics to leadership
- Act as the liaison with IT, Education & Development and Marketing and other stakeholders to develop VME processes and procedures best practices.
- Strategically manage the direction of virtual meetings in an enterprise-wide environment with meeting stakeholders and IT

**Interacting with Virtual Meeting/Event Suppliers**

VME suppliers offer wide-ranging functionality and capabilities – just like the numerous suppliers in the face-to-face meetings environment. It is best to identify the common virtual meeting/event needs with the key stakeholders and use a request for proposal process to find preferred suppliers. Yet, if the organization already has preferred VME suppliers selected (possibly through IT), or if the organization is moving towards Unified Communications (see the end of this chapter for more information on Unified Communications), then reach out to those suppliers first to learn about their services.

Many organizations already have Telepresence (virtual meetings featuring life-size participants, high-definition video and high-fidelity audio) studios or other production studios in their facilities that should be considered before using external suppliers.

If an organization plans to outsource its VME planning and needs to further identify the VME capabilities of its meeting management suppliers, add the following sections to the meeting management request for proposal (RFP):

- Describe your virtual meeting planning capabilities, and list the resources most frequently used, in-house and subcontracted, for webcasts, videoconference and other virtual meeting technologies. Provide detail on your abilities to recommend and support our virtual meeting and event needs.
- Describe the method you use to recommend a virtual meeting over a face-to-face meeting and the process used to access meetings technology.
- How many clients do you provide virtual meetings for?

**Driving Virtual Meeting/Event Adoption**

If you build the strategy and obtain the technology, will your audience use it? No, not unless you provide high quality meetings and events that are engaging and interactive. No one likes to participate in a one-way communication webinar and experience ‘Death by PowerPoint.’ To build stimulating virtual events, design creative activities to engage the audience with interactive content that enforces your message. Consider using an experienced e-learning instructional designer to help build the content for your virtual meetings. A professional knows how to engineer content for the best virtual and mobile delivery. When attendees are progressively immersed before, during and after the VME, the ROI is more likely to be positive.
Changes in action may happen instantaneously, yet changes in repeated behaviors and habit, and changes in attitudes may take years. To help bring about shared virtual meeting and event behaviors, the organization must embrace continuous communication efforts and use rewards and coaching. To help change attitudes and behaviors about VMEs in your organization, consider these strategies below:

- Obtain leadership support: To be credible, the VME strategy must receive the visible commitment and support of Leadership. Leadership plays a critical role in communicating the importance of the VME strategy. In addition, leadership endorsement sets an example for how people will be expected to behave in the future.

- Practice effective communications: Communications have a significant role in generating awareness, understanding, and in building commitment. Effectively informing people of what to expect (and how it fits logically into the business unit strategies) will increase the likelihood that the VME strategy will be accepted.

- Articulate roles & responsibilities: The VME implementation will change how people work, network and meet. A clear articulation of future roles and responsibilities will contribute to the successful acceptance of VME processes. Clearly defined and communicated policies will increase success.

- Identify competencies: As roles and responsibilities change, the capabilities and skills necessary to perform these will also change. For example, people will need to know how to collaborate with peers live online and focus on the virtual environment without multitasking and losing site of the meeting or learning objectives. Identifying competencies and developing education surrounding the initiative is imperative for leadership as well as participants.

- Measure Performance: Measuring performance plays a critical role in shaping how people behave. Performance measures show when to provide corrective feedback and motivate the adoption of the VME strategy. Use the ideas on measuring ROI provided in this chapter to measure performance.

- Reward High Performers: Rewards and recognition amplify the effectiveness of leadership, communications and performance measures recommendations. Rewards and recognition also serve to entice and reinforce the adoption of new behaviors.
Creating a Virtual Meeting/Event Policy

Similar to a typical meeting policy, consider adding the following elements to a VME policy (which may be a subsection of the overall meeting policy).

- Business objectives can be accomplished more economically through the use of audio, video, webcast or another virtual technology. This delivery medium must be considered before conducting a face-to-face meeting. (Link to a page describing the virtual technology options.)
- The meeting planner or site selection/sourcing professional may ask or recommend VME alternatives to the meeting requester. (Link to a page describing the virtual technology options.)
- Virtual meetings/events that are for over 50 people or require the intervention of a technology supplier must be registered in the company’s meetings management technology platform and be listed on the meetings calendar. Self-service virtual meetings through the use of our preferred suppliers (e.g. Webex or another tool) do not require any documentation or registration through the meeting registration technology. [Option: Describe the tiers of service.]
- VMEs that are estimated to cost over $10,000 (Insert the applicable number), may route through the meeting approval process.
- A VME planner will be assigned to support your meeting and assist you with preparation, planning, rehearsals and implementation.
- Preferred VME suppliers will be considered first before using a non-preferred supplier.
- Tier 2 VMEs [describe] should be reserved as soon as possible, preferably two to three weeks or more in advance of the event.
- Tier 3 VMEs [describe] should be reserved as soon as possible, preferably six months or more before the event.

What’s Next in Virtual Meetings?

An emerging trend in VMEs is the introduction and use of a unified communications, an all-inclusive service already prevalent at many large organizations. Unified communications includes voice and cellular services, instant messaging, calendaring, email, video telephony, contacts, and virtual meetings and collaboration tools.

When you integrate virtual meetings collaboration tools into a unified communications application, the tools become standard and less likely to be used ad-hoc throughout the organization. Unified communications will increase adoption and help make virtual technologies easier to use.
Resources on Virtual Meetings and Events

- [www.teplus.net](http://www.teplus.net)
- [http://www.linkedin.com/groups/strategic-virtual-meetings-management](http://www.linkedin.com/groups/strategic-virtual-meetings-management)

About Debi Scholar

Debi Scholar, author of “SMM: The Strategy Quick Reference Guide” and co-author of “The SMM Handbook” (available now on Amazon) consults with organizations, associations, education facilities, and suppliers on virtual meetings and events, strategic meetings management, travel management, and T&E expense management. Debi is a pioneer in the face-to-face and virtual meetings industry using virtual technologies beginning in 1998 to connect distant participants and e-learning attendees. She was the first Meeting Director to have included Virtual Meetings under her direction back in 2002 at PricewaterhouseCoopers and since, has become a leading expert in how to effectively drive virtual meeting adoption to reduce travel costs and complement or reduce face-to-face meetings. In 2002, Debi Scholar, Director at PricewaterhouseCoopers, created a dedicated function within Meeting & Event Services to centralize the management of virtual meetings within the U.S. firm. It started with one full time dedicated virtual meeting manager who planned about 50 events that first year and when she left in 2009, the team was comprised of six full time virtual meeting professionals who planned about 1,000 audio and video webcasts, webconferences and virtual events per year. The virtual meeting team was part of her larger Meeting & Event Services 70-person team that managed $200M+ in meeting spend, over 2,000 face-to-face meetings, and $21M in group air spend.

Debi has led numerous projects for global organizations in numerous industries, entertainment venues, and government agencies as she transitioned to the PricewaterhouseCoopers’ (PwC) Lead for Travel and Entertainment Expenses (T&E) strategic management and worked for the leading consulting firm for 13 years. Before PwC, Debi worked for Dean Witter in #2 World Trade Center as a Technology Training Manager.

One of the most notable projects that Debi won, through an RFP process, was to lead a virtual communications project for a global organization located in 166 countries to reduce their T&E spend and replace travel with virtual
meetings. The project included analyzing travel spend, surveying team members in 60 countries, creating a cost benefit analysis and developing a technology business case to present to senior leadership officials that enabled the organization to use the travel savings to enhance the technology capabilities.

To advance the Strategic Meetings Management (SMM) industry, Debi has created innovative tools and materials such as the first SMM Maturity Model©, the SMM Benchmarking Tool© (available at www.smmbenchmark.com), the SMM Supplier Readiness Assessment©, the SMM Boot Camp©, the SMM Challenge©, the SMM Strategy Articulation Map© and A Guide to Virtual Meetings and Events© in addition to supplying the industry with numerous publications via her blog, www.teplus.net, which has been viewed over 25,000 times and regarded as a "must-read" by an industry trade magazine.

Debi contributed Travel Policy information to the Business Travel Buyer's Handbook, 2011, is on the Editorial Board of HotelExecutive.com, and has been retained by Business Travel Executive Magazine to produce twelve SMM articles.

Debi was selected as the one of the top 20 Changemakers in the Industry, one of the Business Travel News Practitioners of the Year and one of the VIPs in the Strategic Meetings Management Industry. Debi participated on the Global Business Travel Association (GBTA) Foundation Board of Trustees for two years and was the co-chair of the NBTA Groups & Meetings Committee for four years. She participated on the Editorial Advisory Board for MeetingNews magazine. She has been featured in numerous industry articles and was the highest rated speaker for two years in a row at the Strategic Meetings Management Forum. She continues to be a requested speaker at numerous conferences, conventions and events.

Debi's graduated from Davenport University, attended Aquinas College, Indiana University, Wharton and holds the following designations:

- Wharton Aresty Executive Education / Global Business Travel Association (GBTA) Global Leadership Professional (GLP)
- Global Business Travel Association (GBTA) Global Travel Professional (GTP)
- Meeting Professionals International Certificate in Meetings Management (CMM)
- Convention Industry Council Certified Meeting Professional (CMP)
- NBTA Corporate Travel Expert (CTE)
- PwC Six Sigma Green Belt (SSGB)
- Chauncey Certified Technical Trainer (CTT)
- Certified B.A.N.K.™ Sales Trainer (CBST)

Debi has over 45 recommendations listed on LinkedIn.