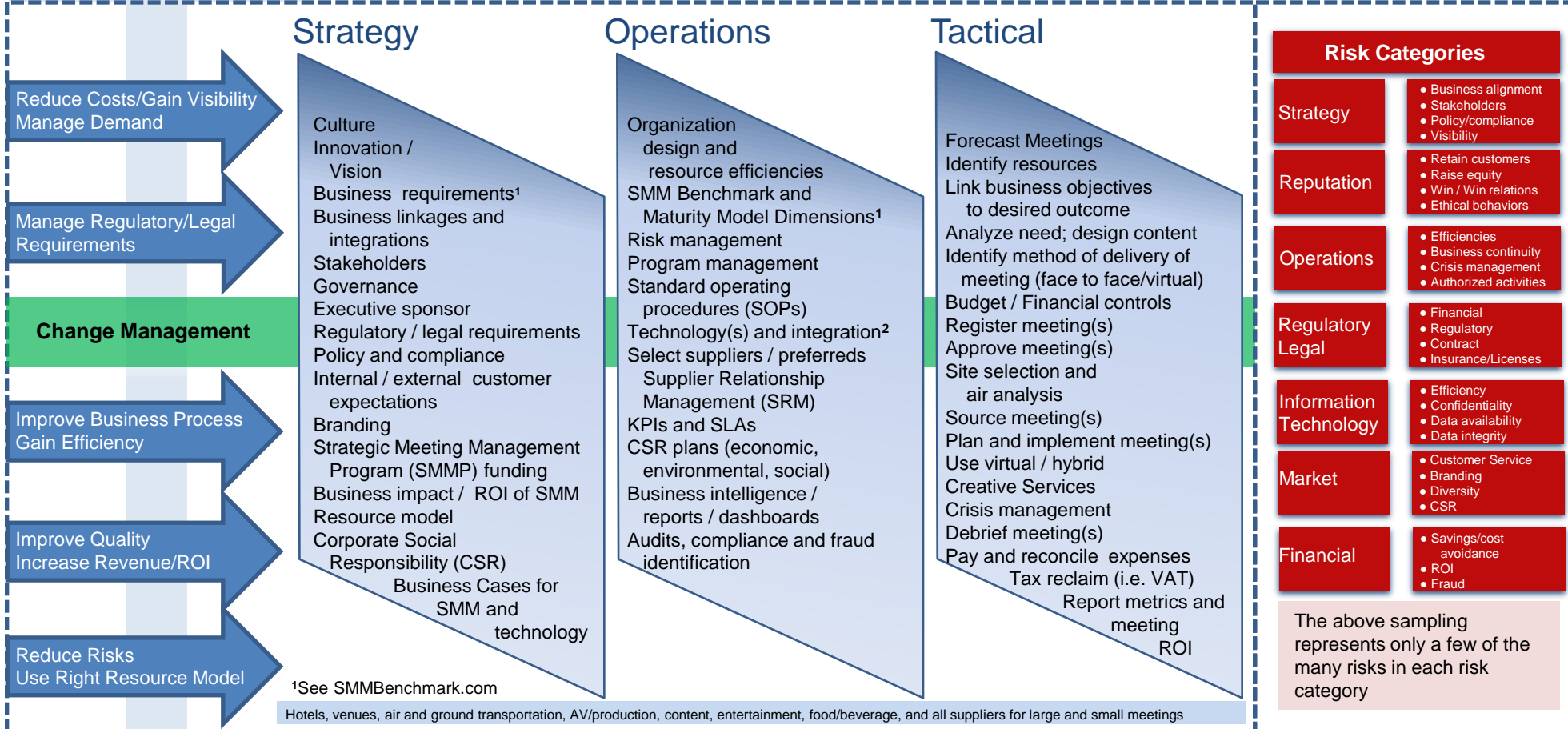




Value Proposition

Strategic Meetings Management (“SMM”) Strategy Articulation Map

Strategic Meetings Management provides direction for organizations to guide the strategy, operations and tactical activities of meetings and events in order to improve business processes, quality, and return on investment, and reduce costs, risks and inefficiencies.



<sup>2</sup>Technologies that may be integrated in SMM

Make technology a means to a solution; not an end to a solution.

Technology should support the organization strategy and enable its processes, not dominate as a strategy.

- Organization's Intranet / Portal
- Meeting Mgmt. System<sup>3</sup>
- Customer Relation. Mgmt.
- Learning Mgmt. System
- Online Booking Tool
- Virtual Meeting Technologies<sup>3</sup>
- Regulatory / Compliance
- Expense Mgmt. / ERP System
- Enterprise Contract Mgmt. System
- Misc. databases

# Strategic Meetings Management Maturity Model

The Maturity Model offers a horizontal linear path to best-in-class, mature activities in each of the components yet the vertical levels may, or may not, be implemented in parallel. The components are not on a master timeline to start and end at the same time so it is possible for an organization to be "Mature" in Policy and "Develop" in Strategic Sourcing as an example.

1 – Describes an organization that is aware of the SMM components and may take first steps in building a program (15-25% savings opportunity)

2 – Describes an organization that is building an SMM program and may launch some components (15-25% savings opportunity)

3 – Describes an organization that has implemented one or a few of the SMM components; Program updates may be underway (10-15% savings opportunity)

4 – Describes an organization with proper oversight, governance and change management (5-10% savings opportunity)

5 – Highest level of Maturity (5-10% savings opportunity)

Value Creation

- ## Learn
- Enterprise-wide strategy needed
  - A person or group may begin to uncover meeting and event spend and volume
  - Recognizes that the collective group of meetings and events may be an opportunity for savings opportunities, risk reduction and service improvement
  - Meetings/events may be captured using some technology (e.g. Excel, multiple dbases, etc.)
  - T&E policy exists; Meeting and event policy does not exist but may be part of strategy
  - Risk awareness but not mitigated
  - Ethics and compliance policy may exist but may not include meeting and event content
  - Ad-hoc and professional planners are being identified; focus group may be created to begin sharing best practices
  - Meeting requests are directed to ad-hoc staff, e.g. AAs, marketing staff, HR, planners, etc.
  - Organization may not be using technology, or some may use a database to track incoming mtgs
  - AAs and other ad-hoc planners contact properties directly for meeting space
  - Contract protection is minimal; Need to advance
  - Most or all meetings and events are planned without standard operating procedures
  - Planning is disparate throughout organization
  - Expenses are paid through corporate card, AP or personal cards; Need to advance strategy
  - Corporate Social Responsibility may be part of corporate plan but may not be considered for meetings and events; Need to advance
  - Limited or ad hoc reports are available on a meeting-by-meeting basis; Need to advance

- ## Develop
- Person or group has identified an executive sponsor
  - Spend, risk, technology and service analysis conducted to identify current state
  - Business case is created for current and future state for strategy, people, processes and technology
  - Limited oversight and governance
  - Marketing and communications may have started; some training may exist
  - Proposed meeting policy vetted with leaders
  - Business leaders supports policy or guideline
  - Strategy, reputation, operations, legal, IT, market and financial risks are identified
  - Resources may be identified for most large meetings and events (may be internal, outsourced or a combination of both)
  - A meeting management technology/database may be used to initiate some meetings/events but may not be enterprise-wide
  - Contract addendum may be created for some professionally managed meetings
  - Procurement processes used sporadically in one or more business units
  - Savings may be tracked for few meetings and events
  - Some business units may be using professional planners and processes for some meetings
  - Ad hoc planning of small meetings is common
  - Ping Risk is minimized (e.g. by business continuity plans, proper certificates of insurance, crisis mgmt plans, proper music licensing, etc)
  - Payment process developed for some meetings and events
  - Unmanaged spend is uncovered by a spend analysis of AP and T&E cards
  - Few planners consider and may act on "green meetings" and use resources to calculate carbon emissions
  - Few reports may be available on known meetings and events; suppliers may contribute to reports
  - Quality of Service tracked by reaction feedback

- ## Evolve
- One or a few components of a strategic meeting management program are in place and communicated for one or more of the business units; Oversight and governance started.
  - Some business units are aware and using the SMMP process and available resources;
  - Bus Leaders, travel and procurement involved
  - Spend, ROI, risk, efficiencies and service managed
  - Program updates may be underway
  - Meeting policy, either stand alone or in T&E policy, is communicated to one or more business units; Business leaders uphold policy
  - Team with stakeholders to create risk mgmt plan
  - Most business units are following the policy and compliance is average to good
  - Resource model is leveraged across some or all business units to drive consistency and service
  - Resources may work on projects that cross over into travel, procurement, and other businesses
  - Meeting registration system and calendar available and use is encouraged
  - Meeting approvals may be in place for those using the system
  - Preferred virtual meeting technologies may be in place and communicated
  - Most business units are using procurement strategies to source meetings and events
  - RFP scoring/evaluation encourages a fair and equitable selection process
  - Contract signing delegation may be in place
  - Approved addendums may be used
  - Document retention policy is communicated to all who source and negotiate contracts
  - Planning standards may exist and some business units may be following
  - Small meetings may gain visibility and require mgmt due to cost, risk and service quality
  - Meeting or P-Card used for most meetings and events
  - Technology may be used to reconcile spend
  - One or more business units may encourage or mandate use of CSR principles for small and/or large meetings
  - Standard reports issued for known volume; quantitative feedback calculated and reported
  - Attendee absorption may be checked/tracked

- ## Transform
- All strategic meeting management components are in place for all business units
  - Business Leaders own, support and market the program
  - Strategy in place for people, processes and technology; Oversight and governance exists
  - Mtg. Mgmt. Technology supported and used throughout all business units
  - Change management optimized
  - Virtual meetings are optimized and supported
  - Meeting policy supports the strategy and all business units are following; Policies revised regularly as needed
  - Risk mitigation and governance is optimized
  - Compliance monitored through monthly reports
  - In addition to typical sourcing/planning skills, resources are educated on SMM and virtual meetings
  - Resources operate seamlessly for sourcing/planning (insourced/outsourced)
  - All small and large meetings and events are registered and routed through an approval system, if approvals are applicable
  - Small meetings may be sourced and planned using an express process or system
  - Virtual meeting communication options are visible and supported for meeting requestors and attendees
  - All business units are sourcing meetings and events using enterprise-wide procurement process supported by technology
  - Corporate contract may be created and used in place of addendum; or addendum is used for all applicable meetings and events globally
  - Concessions and discounts may be negotiated across multiple meetings or an entire program
  - Planning workflow is automated through technology for all meetings and events
  - Emergency management and incident handling plans are used by all planners; attendee location tracked
  - Mtg. or P-Card payments are reconciled using integrated technology solutions
  - Disputes are actively managed and resolved within 45 days; Available credits visible
  - Common to use CSR components such as incorporating "green meeting" initiatives (environment) and incorporating community volunteer activities into meeting content (social)
  - Dashboard metrics are used by Sr. Leaders to manage demand; suppliers contribute data
  - Attendee application of meeting/event objectives tracked

- ## Mature
- T&E strategy used for all spend categories throughout all business units globally
  - Services and stakeholders are linked and integrated such as travel, procurement, meetings and events, finance, and security for all T&E categories
  - Technologies are integrated and seamless for users (Mtg. Mgmt., OBT, LMS, ERP, etc.)
  - Meeting and event intranet site accessible for all global staff with resources, tools, suppliers, etc.
  - Active marketing and communications
  - T&E policies are integrated and automated into business processes
  - Strategically sourced suppliers understand and support the policy
  - All risks in seven risk categories are mitigated and audited
  - Compliance monitored and consequences are instituted for non-compliance
  - Resources for SMM, sourcing, planning and execution are forecasted and optimized using best resource model for organization
  - Resources are in an organization with career paths and management opportunities
  - Automated workflow for large and small meetings through technology system
  - Processes integrated through LMS, OBT, ERP, and Mtg. Mgmt. technology
  - Demand management optimized by encouraged or mandated use of virtual communications technologies
  - Content created and linked to BU objectives
  - Leveraged spend and suppliers among all T&E categories (business travel, meeting and events, entertainment, catering)
  - Global strategies and supplier partnerships are sourced and audited regularly
  - Enterprise Contract Management system is in place and used; sourcing technology used
  - Globally designed and locally performed SOPs used by planners
  - Tasks are automated for small and large meetings using mtg. mgmt. technology(s)
  - Visibility into unmanaged spend
  - Authority to rectify with offenders through compliance policy
  - Audits performed regularly
  - Three pillars of CSR (Economic, Environment and Social) are strategically incorporated into all aspects of the SMM, meetings and events globally in all business units
  - Follow the Dow Jones Sustainability Index
  - T&E spend (incl. mtgs and events) is reported and managed through ERP system or another expense mgmt system
  - Data intelligence through metrics help drive business decisions; ROI calculated

- Components
- Strategy and Governance
  - Policy, Risk Mgmt, Compliance
  - Resource Mgmt
  - Meeting/Event Requests
  - Strategic sourcing
  - Plan and Implement
  - Payment and Reconciliation
  - Corporate Social Responsibility
  - Reporting