

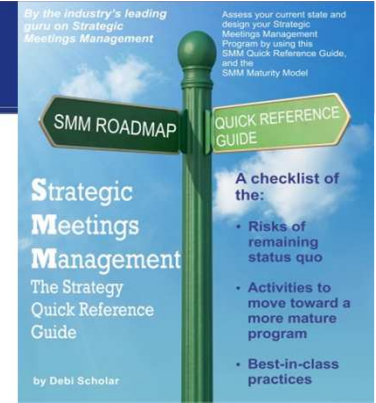


Strategic Meetings Management

Debi Scholar

President, The Scholar Consulting Group

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According to the State of the Industry Report by Meeting Professionals International ...

TRENDS

01 SMM is critical, not optional.

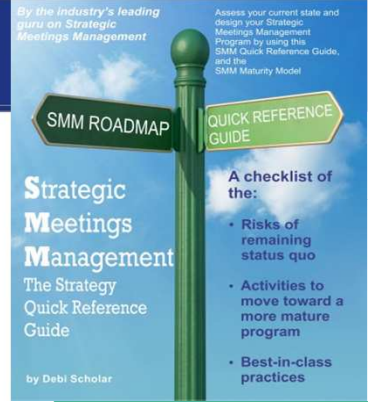
You Say: Two acronyms will dominate meeting industry dialogue this year—SMM and ROI. It has never been more important to build meeting strategy and measure results.

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2011 The Year Events Get Smart

FutureWatch 2011

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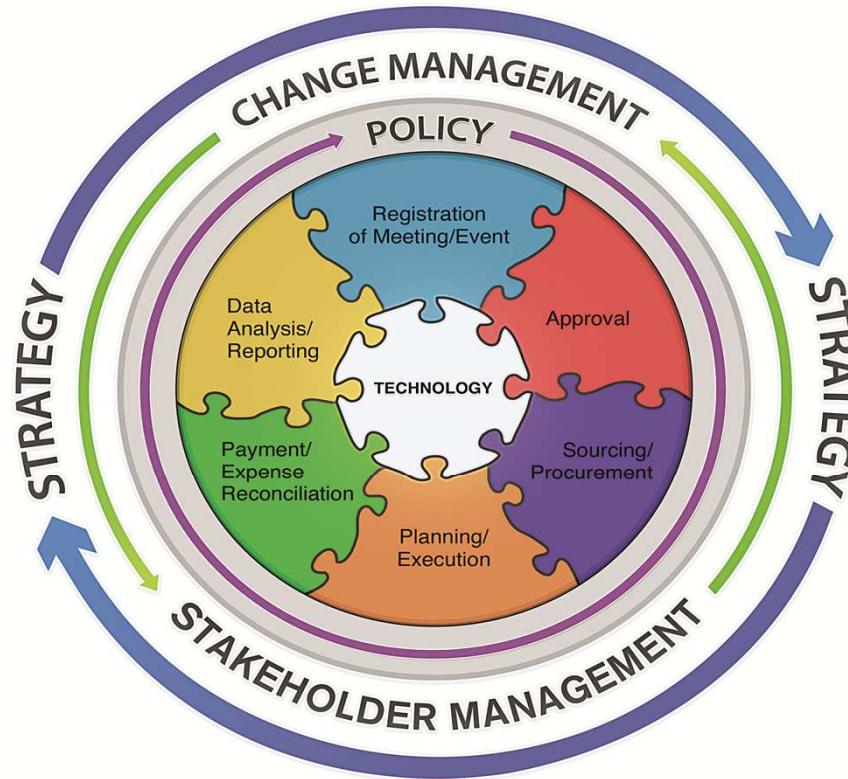
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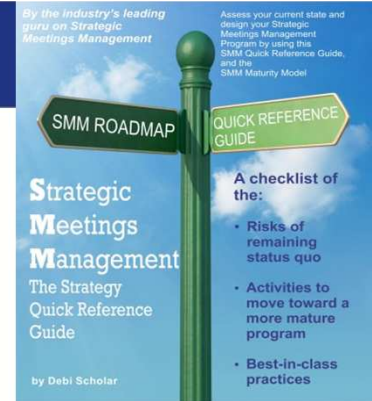
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Strategic Meetings Management (SMM) is a disciplined approach to managing enterprise-wide meeting and event activities, processes, suppliers and data in order to achieve measurable business objectives that align with the organization's strategic goals / vision, and deliver value in the form of quantitative savings, risk mitigation, and service quality.



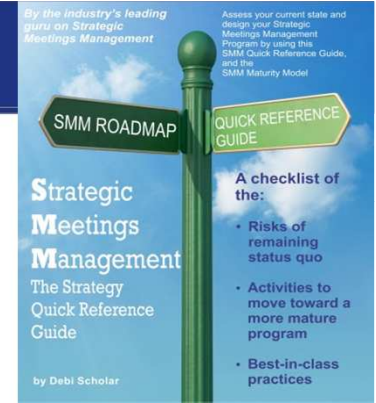
Global Business Travel Association produced the first whitepaper on SMM in March 2004.



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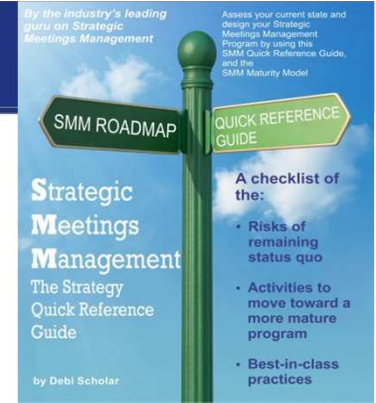
20 Questions – Find the Answers

1. Who and how many people are planning meetings/events? What business units are they from? Do they have planning skills?
2. How much money are we spending on meetings/events? Is the data captured anywhere?
3. How many meetings/events did we have in the last 12 months? Is the data captured anywhere?
4. How many meetings/events are on our company-wide calendar for the next 12 months? Is there a company-wide calendar of meetings and events?
5. Do meetings/events require approval? Where is the approval captured?

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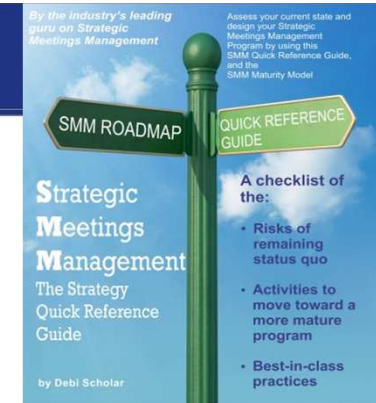
20 Questions – Find the Answers

6. Do our meetings/events include estimated budgets? Where are the budgets captured?
7. Are we using standard [organization] language in our hotel and supplier contracts? Where are the contracts stored?
8. What technologies are we using for meetings and events? What is their functionality?
9. Do we have standard operating processes for meetings and events? Where are the SOPs stored? Does everyone use these documents?
10. Do we have a meeting policy? Where is it stored? How is it communicated?

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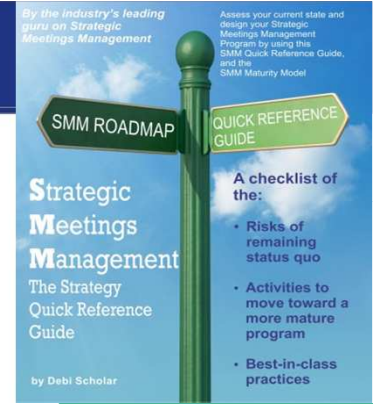
20 Questions – Find the Answers

11. What supplier is used to book travel for our meetings and events? Is this the same supplier that is used for transient travel?
12. How many penalties have we incurred in the last 12 months? Where are the penalties stored? Do we have credits available?
13. Do we strategically use our preferred transient properties for any meetings? Do we have a small meetings program in place?
14. What do our suppliers know about our business and what do they recommend?
15. Do we have preferred suppliers? How do we source our meetings/events?

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20 Questions – Find the Answers

16. What is the itemized breakdown of our spend in each supplier category (e.g. hotel, air, ground, AV, etc.)
17. What do our clients think of our meeting/event resources, processes and technology(s)?
18. Do we have crisis management plans in place for all meetings/events?
19. Do we recommend virtual meetings as a viable option or as a complement to our meetings/events?
20. How do we pay for all of our meetings/events?

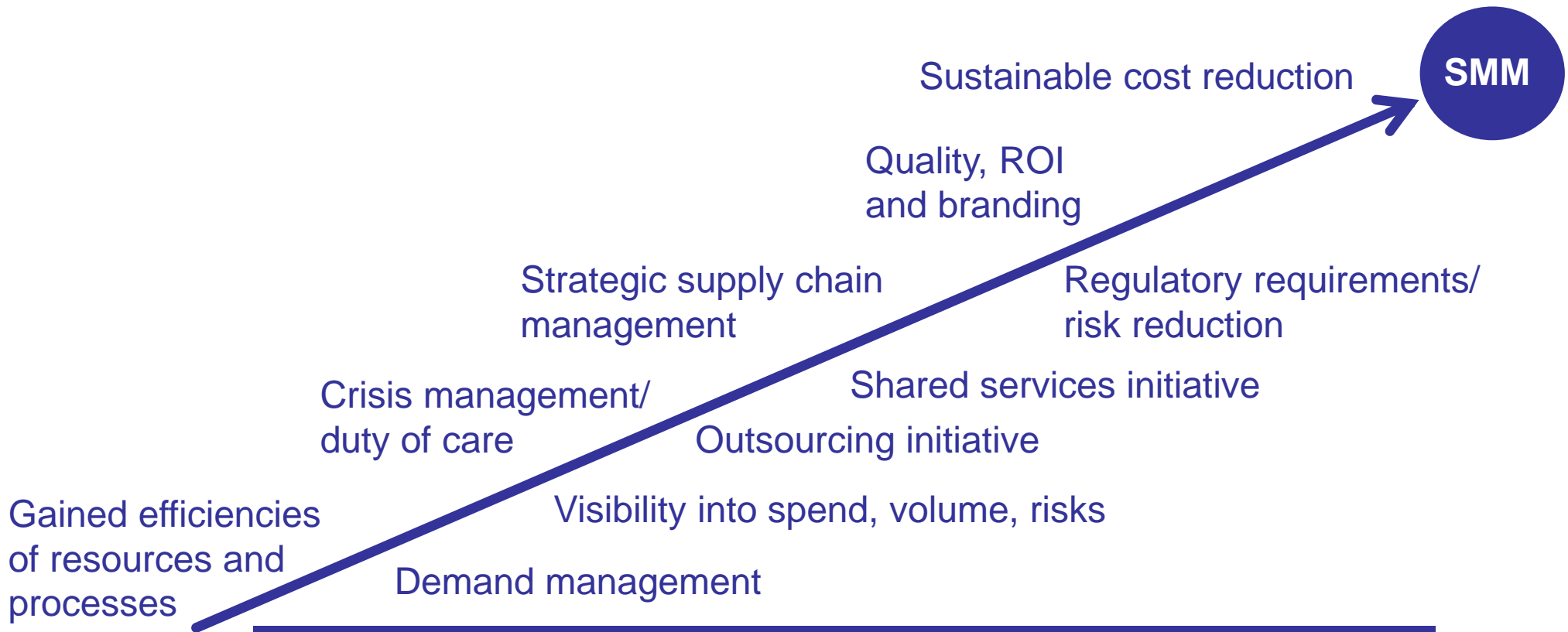
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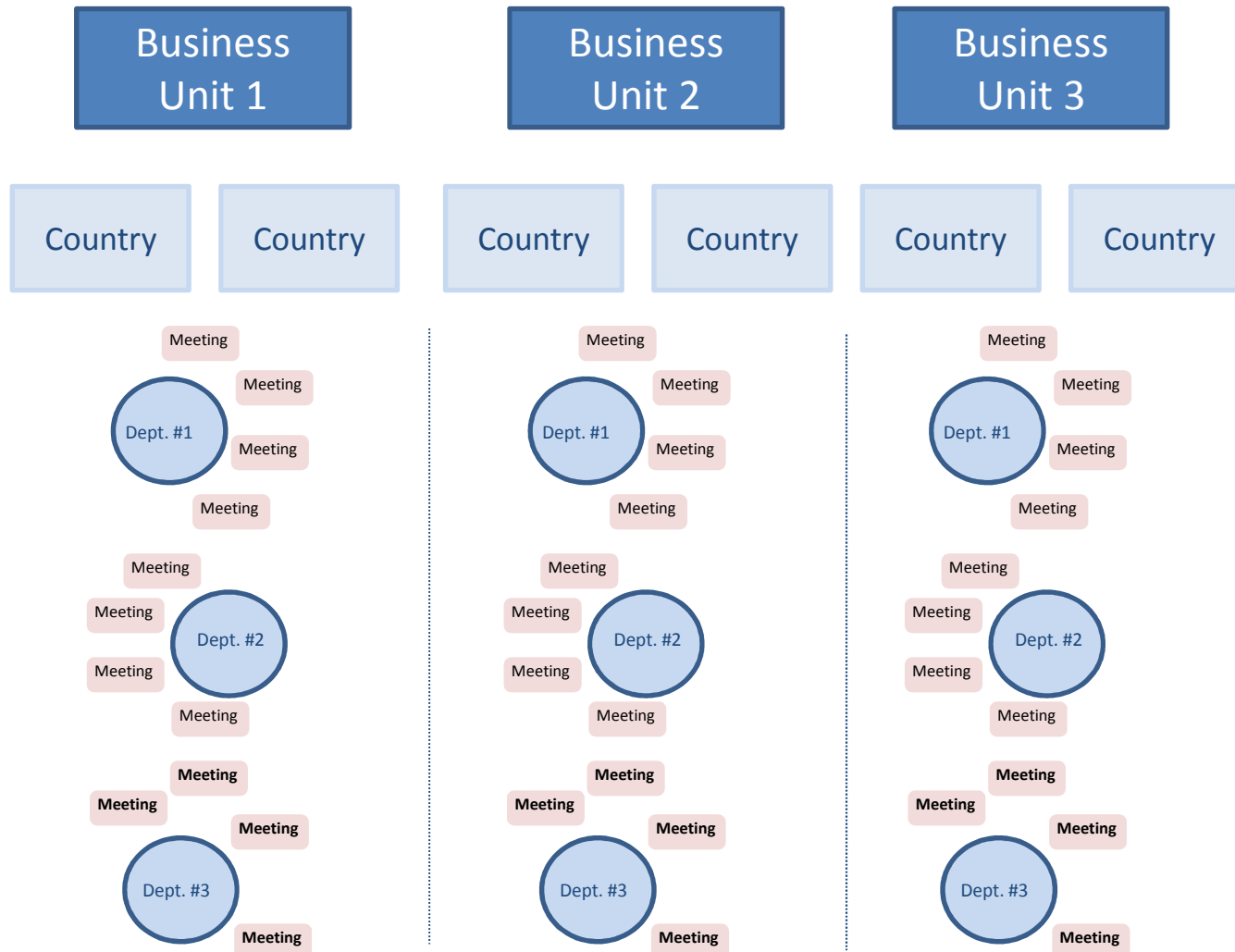
10 common, powerful forces driving SMM Programs (SMMP)*



*Priority of the driving forces is driven by the organization's objectives and, often, the person who may be leading the effort (e.g., Marketing leader may expect higher ROI while CFO may expect sustainable cost reduction)



Example of Meeting and Event Silos within an Organization

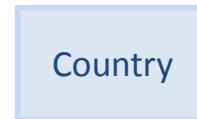
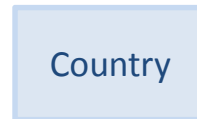
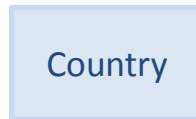
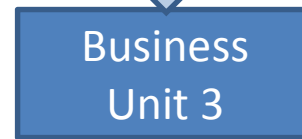
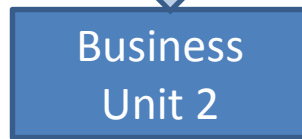
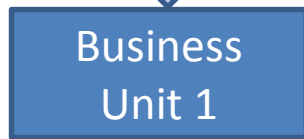


When meetings are not strategically managed, an organization encounters inconsistent and ineffective:

- Processes
- Contracts
- Suppliers
- Technologies
- Resources

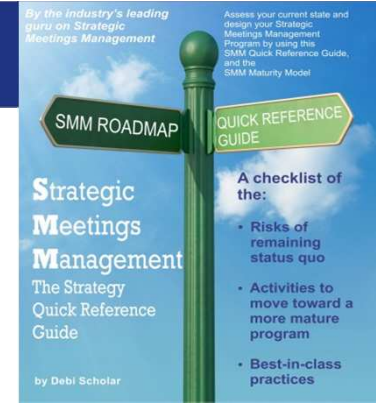


Organization-wide Management



Benefits include:

- Common vision for meetings / events
- Improve branding
- Leverage spend / contain costs
- Reduce risks
- Gain efficiency
- Improve quality / consistency
- Improve and automate processes
- Increase visibility
- Build improved relationships with suppliers
- Forecast and leverage resources
- Improve business continuity / manage crisis planning activities across enterprise



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Strategic Meetings Management can be used to integrate the following spend categories for greatest savings opportunities and efficiencies

Highly Fragmented Spend

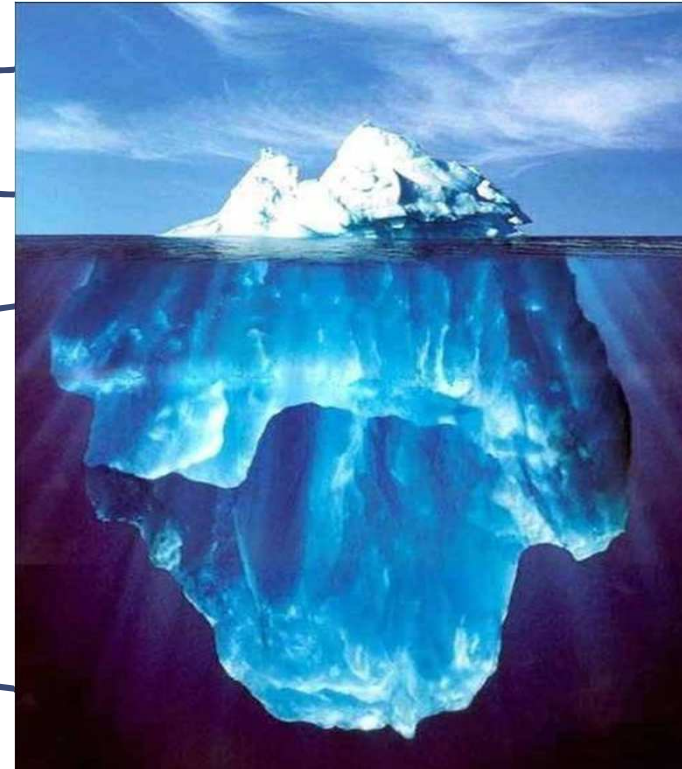
- Travel
- Hotels
- Meetings and events
- Ground transportation
- Entertainment assets
- Client entertainment
- Ancillary support (audio visual, production, content (speakers)
- Sponsorships
- Conventions and Trade Shows
- Incentive Programs
- Webcasts, webinars, virtual meetings
- Gifts and giveaways
- Technology(s)

Exceedingly Disparate

- Service and consistency
- Process and controls
- Resources
- Technology and automation
- Payment methods
- Data and metrics

Managed Spend*

Unmanaged spend



*Managed spend is often siloed by spend category or within business unit rather than throughout enterprise

Estimate total meeting/event spend by one of these methods:

- 25-35% of total T&E spend
- 60% of corporate air volume
- 1/2 to 1% of annual gross sales
- 2-3% of revenue



Meeting and events expense management maturity

Meeting and event spend is 25% - 35% of your total T&E costs

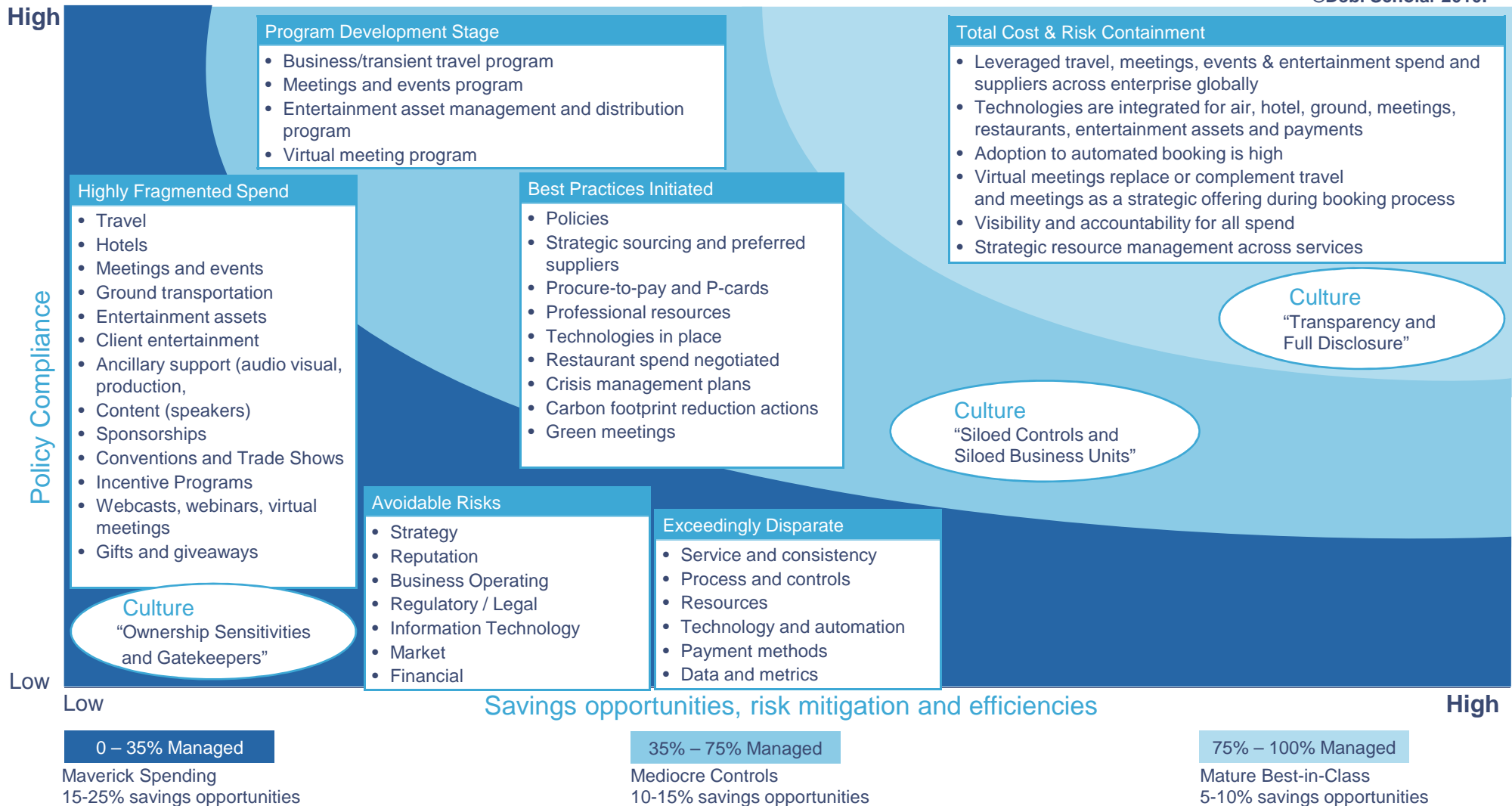
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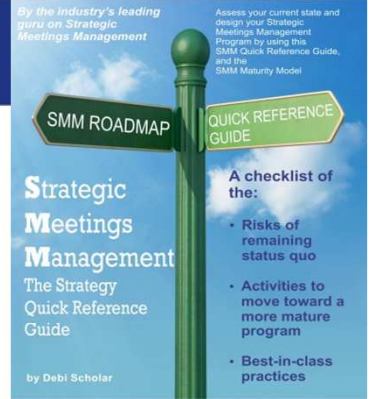
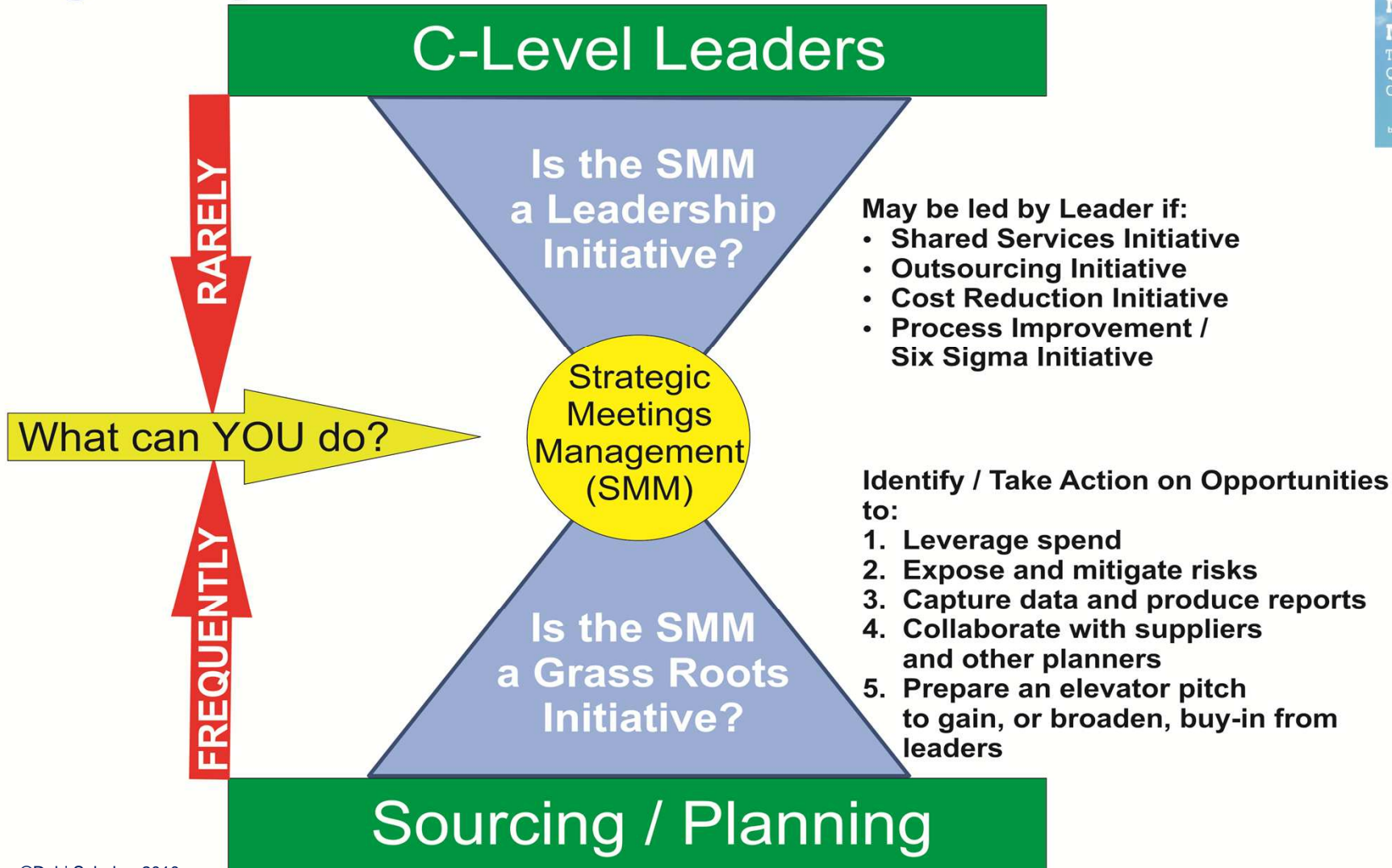
Meetings and events management maturity: Move toward *High and High*

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Beginning the SMM Initiative



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Treat an SMMP initiative as a professional project

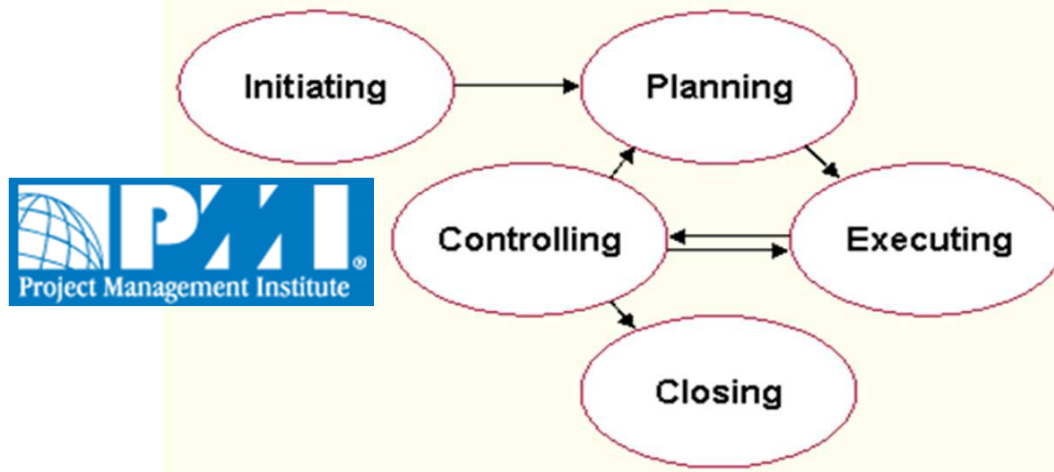
Use project management discipline

Implementing a Strategic Meetings Management Program



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Five Major Project Management Processes



The “project” may close, but the SMM initiative is in the “control” stage and requires continuous improvement.



Where to find Meeting and Event spend

Accounts Payable

Look for:

- Travel Spend
- Meeting Spend
- Management Fees

Hotels
Travel Agencies / Travel Management
Transportation Services
Meeting Management Companies
Audio Visual / Production Companies
Entertainment Venues
Restaurants
+ More

Corporate Cards, P-cards, Meeting Cards

Look for:

- Travel Spend
- Meeting Spend
- Management Fees

In 40+ Standard
Industrial Classification
Codes

Hotels
Airlines
Travel Agencies / Travel Management
Transportation Services
Meeting Management Companies
Audio Visual / Production Companies
Entertainment Venues
Restaurants
Destination Management Services
+ More

Leverage total spend
with suppliers:

Hotels
Travel
Travel Management
Ground Transportation
Audio Visual
+ More



Building an SMMP

1. **DEFINE** - Develop the problem/opportunity statement including the breadth or scope of your initiative. Develop a stakeholder list (see Appendix) and find an executive sponsor. Consider this **YOUR “BUSINESS.”**
2. **MEASURE** - Begin speaking to stakeholders to determine the current state such as spend, processes, policies and staff involved in planning meetings and events. Ask business leaders and meeting sponsors, conduct surveys, search through finance, T&E and credit card data, and ask your suppliers/hoteliere for their records. Also note, it is common for meeting spend to be approximately 25%-35% of your total T&E spend.



Building an SMMP

- 3. ANALYZE** - Identify the opportunity by seeking cost savings/avoidance, process efficiencies and risk mitigation actions. Determine the cost of implementing the SMMP against the benefits. Develop an SMMP business plan (Template at Debi's blog located at: www.teplus.net)
- 4. BUILD** - Engage stakeholders to exchange knowledge and ideas. Emulate the successes of others in the industry. Develop a process map and supporting documentation. Prepare a business case or plan including current state, potential future state, gap analysis, and cost/benefit analysis. Determine priorities as to how and where to begin.



Building an SMMP

5. **IMPLEMENT** – Communicate, educate, motivate, market, and use sound change management activities to roll out the SMMP. It may be in a phased approach or across the whole enterprise at the same time.
6. **IMPROVE** - It is ever-evolving and requires continues improvement as do the change management activities. Ongoing communications and education is required. Innovate. Be flexible.
7. **CONTROL** – Use innovation, change management, policies, controls and consequences to sustain your program while keeping “Improve” and “Control” in a continuous cycle.

NOTE: Most practitioners break down the tasks into manageable action items. In large organizations, it is common for 100% adoption to take 3-5 years.



*Of the total percentage saved

SMM Savings Opportunities

Policy

*
20-30%

Adhere to policy spending guidelines
Improve leadtime of meetings/events
Drive adoption of online booking tool for group travel

Demand Management

15-20%

Reduce length of meetings using virtual technologies / eliminate non-essential
Reduce or lower demand of product or service

Strategic Sourcing
(hotels and other suppliers)

8-15%

Move market share towards preferreds
Improve negotiations, use master contracts
Leverage spend with transient volume

Technology / Automation

8-10%

Automate end-to-end process
Integrate technologies
Reduce legal/regulatory fees by improved compliance

Planning Negotiations
(hotels and other suppliers)

5-10%

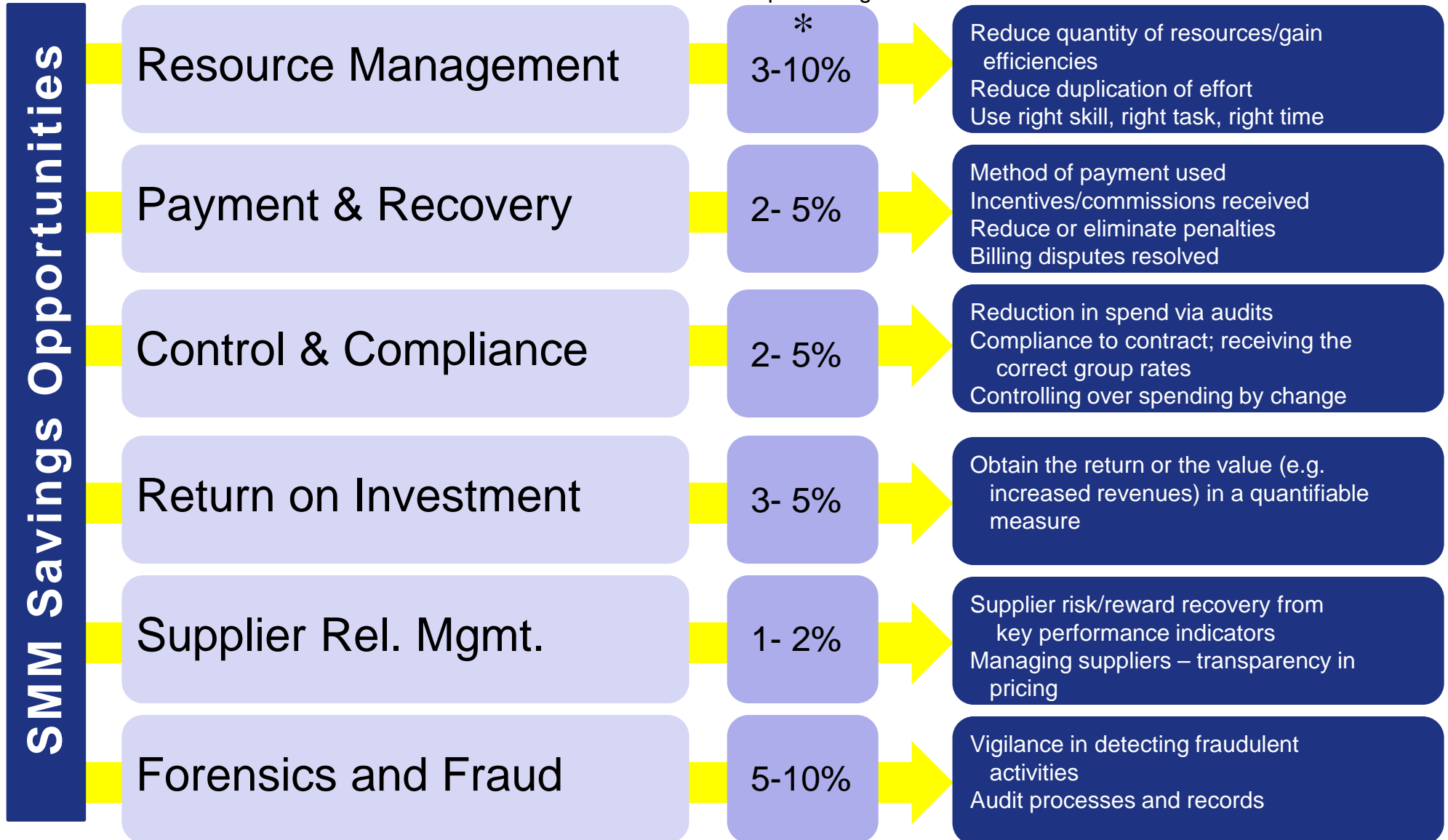
Negotiate pre-meeting, during meeting and post meeting to gain cost reductions

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*Of the total percentage saved



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Strategic Meetings Management Programs Value Proposition Opportunities

Strategic Sourcing and Planning Management

- Use strategic sourcing to consolidate and select preferred suppliers
- Negotiate annual agreements with standard concessions
- Use skilled hospitality negotiators during sourcing and planning stages
- Increase visibility into historic negotiations by using automated sourcing tools
- Leverage meetings volume spend with transient travel
- Optimize meeting choices and reusability
- Divide meeting costs by type; benchmark against others for potential excessive spend in certain areas
- Use local talent, staffing, resources and suppliers
- Adjust minimums and guarantees
- Eliminate deposits
- Eliminate/reduce gifts and promos
- Monitor attendee registration to reduce attrition penalties
- Negotiate with Travel Management Company to leverage meeting management services capabilities (sourcing and planning)
- Buy vs. rent

Demand or consumption management – reducing the quantity

- Move toward virtual meetings as an alternative.
- Eliminate unnecessary meetings; reduce frequency or length of meetings; identify carbon footprint of meeting
- Ensure meetings meet business objectives
- Consolidate multiple meetings into fewer locations
- Collaborate with business units, external partners to share meeting expenses, materials and resources
- Collaborate with external partners to share and use penalty credits
- Enforce no-show attendee penalty charges
- Close registration to avoid overflow situations
- Reduce meeting and resource requirements
- Use hot dates/distressed space first
- Provide approvers with all meeting and content costs
- Restrict approvals to leaders only
- Provide budget to actual spend reports to gain visibility into overruns

Productivity, Process and Resource Management

- Create standard operating procedures for all processes
- Improve quality, turnaround time and consistency by using experienced planners
- Reduce manual tasks such as email attendee tracking
- Automate meeting registrations using self-serve forms and meeting sponsor input
- Use templates and automation for eRFPs, sourcing and attendee registration
- Automate and drive a rapid payment/reconciliation process to take advantage of discounts
- Automate group travel booking
- Automate attendee reimbursement process
- Allow for online networking of attendees to alleviate one-way communication for Q&A before meeting
- Use the right skill for the right job to reduce resource costs
- Forecast resources to reduce non-utilization of full time employees

Policy, Compliance, Duty of Care Management

- Eliminate spend on point accruing cards
- Mandate advance scheduling of meetings/events
- Mandate advance travel bookings
- Eliminate unethical perks and gifts
- Mandate use of properties with penalty credits first
- Follow through on consequences for non-compliant behavior to policy
- Comply with Sarbanes-Oxley, Healthcare and Government regulations to reduce possibility of fines
- Ensure confidentiality, security and intellectual property
- Add insurance coverage for events or activities not typically covered
- Ensure branding corresponds to vision, mission and values
- Incorporate corporate social responsibility and green meeting efforts

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Strategic Meetings Management Programs - Value Proposition

Issues

- Inability to capture meeting/event spend, volume, contracts, effectiveness or locations
- Lack of controls which may lead to negative Sarbanes-Oxley Audit Results
- Paying premium rates; failure to reduce excessive spend
- Meetings/events being held without leadership approval
- Unauthorized contract signers
- Excessive non-preferred suppliers
- Inability to find staff in crisis situations
- Lack of consistency, quality and branding of meetings/events
- Wrong roles/types of professionals spending time planning meetings
- Lack of metrics

RISKS

- Vulnerable to numerous legal/regulatory, financial, operational and intangible risks such as:
 - SOX/regulatory
 - Contract management
 - Insurance
 - Document retention
 - Crisis Management
 - Conflicts of Interest
 - Branding continuity
 - Confidentiality

Opportunities

Strategically position the organization to proactively manage meeting and event volume, costs, risks, and effectiveness.

- Align meetings/events to business strategy; increase quality, consistency and continuity with branding requirements
- Build a proactive environment that integrates capture mechanisms and controls across the enterprise
- Reduce costs and risks associated with meetings and events
- Encourage alternative options such as virtual meetings to reduce costs, increase productivity and decrease carbon footprint
- Establish dashboard metrics to monitor and manage meetings and events.
- Optimize resources
- Automate for efficiency and security

Actions

Streamline the sourcing and planning of meetings while adding necessary controls:

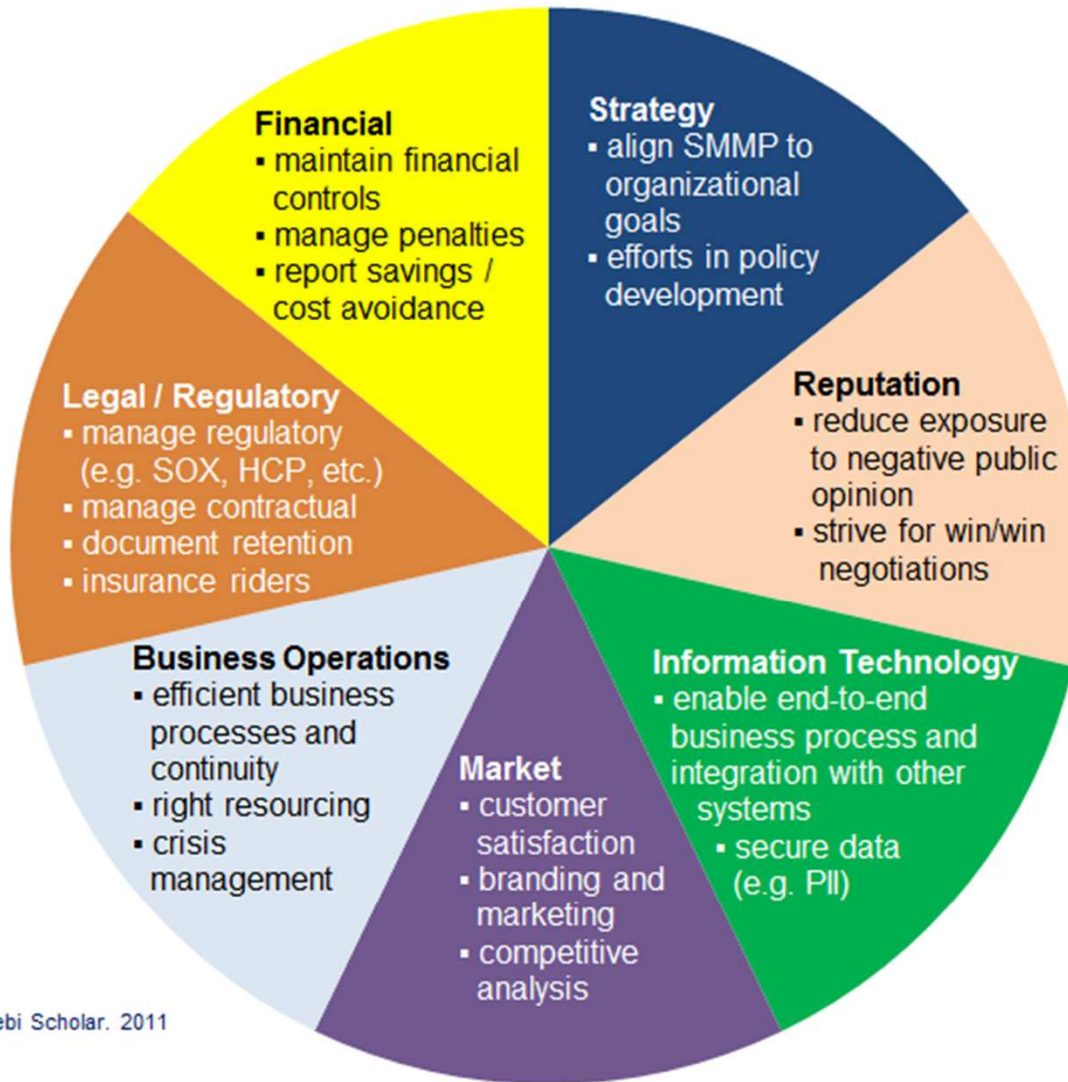
- **Policy and Compliance** – Develop an organizational policy and compliance mechanisms linked with travel, T&E and other stakeholders
- **Uncover and Control** - Systematically capture all meeting and events by using a web-based tool for self-service input. Follow with leadership approval to ensure fit with business strategy
- **Strategic Sourcing and Savings** - Incorporate strategic sourcing for meetings and events. Formalize contracts and concessions to leverage savings across the organization and with transient travel spend
- **Resources** - Develop a resource model for optimization; forecast meetings and events to ensure non-utilization of resources
- **Processes** - Process map and establish standard operating procedures to ensure consistency and reduction in duplication of effort
- **Automate** – Automate the end-to-end meeting and event process; provide enterprise-wide consistency
- **Payment and Reconciliation** – Determine the most cost-effective and time efficient payment and reconciliation system for meetings and events
- **Reporting** – Build management metrics and standard reports; create dashboard for business units
- **Change Management** – Manage the master project plan, educate and communicate the changes throughout the organization to ensure consistency across the service delivery team

Benefits

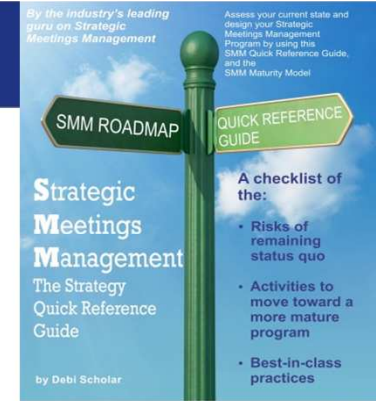
- Approved meetings/ events aligned with business strategy
- Lower costs, reduced risks
- Increased confidence in control effectiveness to meet Sarbanes-Oxley requirements
- Simplified and standardized meeting and event planning with centralized calendar
- Appropriate use of resources
- Viable virtual meeting strategy for alternative
- Improved crisis management procedures
- Transparency in volume, costs and effectiveness with ROI capabilities
- Increased teaming among travel, finance and other stakeholders



Identify the Risk Exposure



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Strategic Meetings Management Programs

Risk Mitigation

Legal/Regulatory Risks

- **Sarbanes-Oxley**
- **Healthcare Compliance**
- **Government Regulations**

If conference or meeting regulations are not followed, then organizations could be fined or appear corrupt.
- **Contract Management**

If contract language does not protect the organization, then they could be charged or sued.

If unauthorized employees sign meeting contracts, then contract may be voided or challenged in court.
- **Insurance**

If the proper insurance is not garnered, then organizations could be sued or found liable.
- **Document Retention**

If RFPs and contracts are not retained for the appropriate length of time, then auditors may deem the organization "unauditable."

Financial Risks

- **Savings/cost avoidance**
- **Penalties-Cancellation or Attrition**

If negotiations are not pursued aggressively and penalties not reused, then organization could lose savings or cost avoidance of 10% - 20% or leave money on the negotiating table.
- **Preferred suppliers**
- **Leverage meeting and business travel spend**

If meeting and event volume is not leveraged, or not leveraged with all business travel transient spend with key suppliers by strategic sourcing, then organizations miss out on 15%-20% savings on supplier management.
- **Payment and Expense Reconciliation**

If non-standard or decentralized payment and expense reconciliation methods are used, then organizations

 - a) Pay higher than average processing costs cutting checks manually,
 - b) Finance point-accruing cards favored by employees and
 - c) Miss valuable data that a single, consolidated process could deliver to best leverage volume for future negotiations.
- **Meeting Approvals**

If meetings and events planned and contracted are not visible to leaders on a master calendar or in a contract repository then organizations may be unable to postpone, cancel or adjust meetings to align with business objectives and thus, inadvertently hold more meetings, or spend more money. Issue also presents risks for SOX compliance in that management may not be in control of spending.
- **ROI and Analysis reporting**

If ROI and meeting metrics are not analyzed regularly or organizations are not tracking total meeting spend, then they may spend money unnecessarily.

Operational Risks

- **Crisis management preparedness**

If meetings and events are not registered in a central technology system for tracking purposes, then organizations may be unable to track employees during crisis situations.
- **Business Continuity and Consistency**

If interruptions, disasters and weather are not considered, then organizations may be in a mayday situation with location, logistics, resources or other critical components.
- **Automated processes and standard operating procedures**

If processes and procedures are not standardized, then organizations may lose productivity and require more resources
- **Customer Service**

If inexperienced planners are used, then organizations may experience a level of service inconsistent with business goals and/or brand standards.
- **Resource Constraints**

If resources are not forecasted, then organizations may encounter poor implementation, lack of people to follow through or excess capacity.
- **Systems and Technology**

If systems and technologies are not considered, then organizations may lose critical data, productivity and strong reporting capabilities

Intangible Risks

- **Conflicts of Interest**

If inexperienced planners or others accept unethical gifts or unnecessary familiarization trips, then organizations could be perceived as lacking employee compliance to policies and allowing bribes.
- **Confidentiality and Intellectual Property Protection**

If controls and contract language are not in place, organizations face the possibility of breaches and competitors in same property at close proximity.
- **Branding**

If meetings and events are planned without considering the organization's branding standards, then they may experience damage to brand recognition and marketing.
- **Corporate Social Responsibility**

If meetings and events are planned without considering the organization's corporate social responsibilities, then they may be perceived as inconsiderate and may lose valuable clients.

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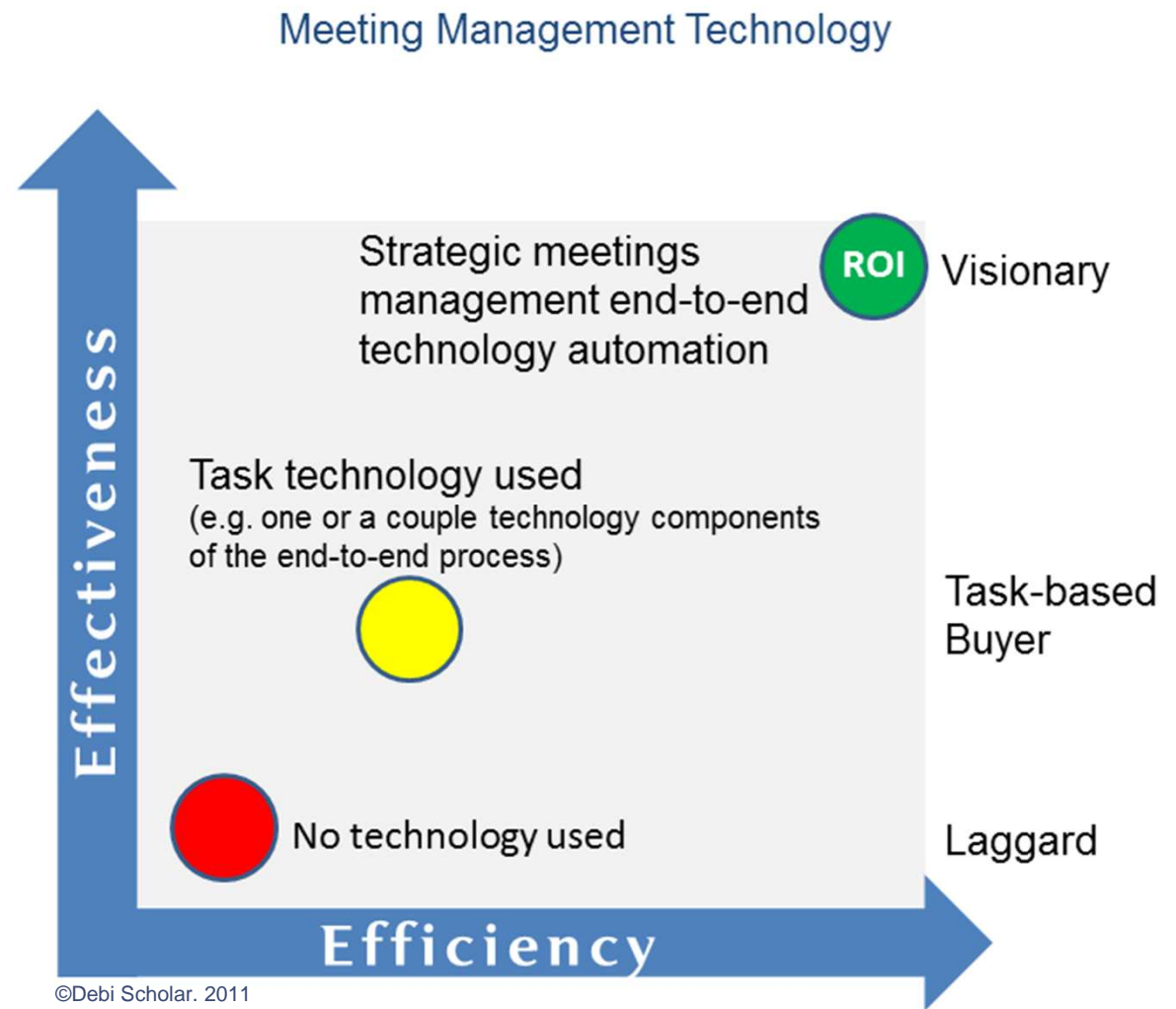


Buy Technology like a Visionary

If you buy a technology that only services your immediate needs at a tactical level, what will you do when your program moves towards maturity and you require more functionality?

Will you migrate all of your current data to the improved technology?

Why use multiple technologies in a patchwork environment when you can have one technology that services all of your needs?





Technology Functionality

No.	Functionality	Technology Supplier A		Technology Supplier B	
		Available through single-source supplier	Unavailable	Available through single-source supplier	Unavailable
1.	Meeting portal website with links to policy, FAQs, calendar, etc.				
2.	Meeting registration				
3.	Meetings calendar				
4.	Approval routing				
5.	Supplier database with ability to customize based on preferred suppliers				
6.	eRFP / Sourcing / evaluation analysis				
7.	Communications to attendees				

Do you want to buy full-functioning or patchwork technology?



Technology Functionality

No.	Functionality	Technology Supplier A		Technology Supplier B	
		Available through single-source supplier	Unavailable	Available through single-source supplier	Unavailable
8.	Budgeting; credit availability				
9.	Attendee management (meeting website, registration, rooming list accommodations, and uploads, etc.)				
10.	Policies and exceptions within system; automated escalation				
11.	Surveys				
12.	Payment and reconciliation (payment to suppliers and speakers, accept payments from attendees)				

Do you want to buy full-functioning or patchwork technology?



Technology Functionality

No.	Functionality	Technology Supplier A		Technology Supplier B	
		Available through single-source supplier	Unavailable	Available through single-source supplier	Unavailable
13.	Enterprise-wide data reporting (across all meetings) including ad hoc and custom reporting				
14.	Small meeting solution				
15.	Virtual meeting management				
16.	Compliance tracking				
17.	Multiple language capabilities				
18.	Multiple currency capabilities				

Do you want to buy full-functioning or patchwork technology?



Technology Functionality

No.	Functionality	Technology Supplier A		Technology Supplier B	
		Available through single-source supplier	Unavailable	Available through single-source supplier	Unavailable
19.	Arrival/departure manifests				
20.	Resource management (to track sourcing and planning team time, activities)				
21.	Document retention (to store contracts and other important documents)				
22.	Ability to integrate seamlessly with CRM, OBT, ERP, ECM, LMS, Compliance databases, etc. – 2 way data transfer				
23.	Ensure that you own the data; that it is portable in the desired format				

Do you want to buy full-functioning or patchwork technology?



Buy Technology like a Visionary

Use a meetings and events portal to drive adoption to your program, register all your meetings/events, and improve your change management efforts

Meeting and Event Services

- Plan/Register a Meeting or Event
- Policies, Procedures and Guidelines
- Meeting Resource Center
- Calculate your Meeting/Event Costs
- Small Meetings (less than XX people)
- Cancellation Credits Available
- Training Opportunities
- HELP and FAQs
- Contact Us

The Meeting and Event Services ("MES") team provides the organization with expert services in site selection, contract negotiations, attendee management, planning/onsite services, and paying invoices for meetings and events. In addition, the MES team manages virtual meetings (TelePresence, videoconference, webcasts, webinars) for meetings that are larger than 50 people and are not self-service. The MES strategic meetings management services provides for superior meeting quality, consistency, accountability and risk mitigation while allowing for flexible, creative solutions.

[Register a Meeting/Event](#)

[View the Calendar](#)

[Current Meetings/Events](#)

Board Meeting

When: [date and time]
Where: [location]

Training Class

When: [date and time]
Where: [location]

Recruiting at State University

When: [date and time]
Where: [location]

Leadership Forum

When: [date and time]
Where: [location]

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Top 10 Reasons to Build an SMMP

- 1. Increase visibility into meeting and event volume, spend, types and venues**
- 2. Reduce legal/regulatory, financial, operational and intangible risks by creating policy or guidelines and compliance tracking**
- 3. Reduce costs with suppliers by formal negotiations, using standard contracts, and using cancellation/attrition penalties**



Top 10 Reasons to Build an SMMP

4. Reduce number of suppliers and create preferred supplier programs for increased savings

5. Reduce duplication of effort by aligning all meeting business into professional planning teams, formalizing outsourced relationships or creating a hybrid approach

6. Leverage spend with suppliers for business travel (transient) and groups, meetings and event spend; make it easy for administrative assistants and others to use a small meetings solutions



Top 10 Reasons to Build an SMMP

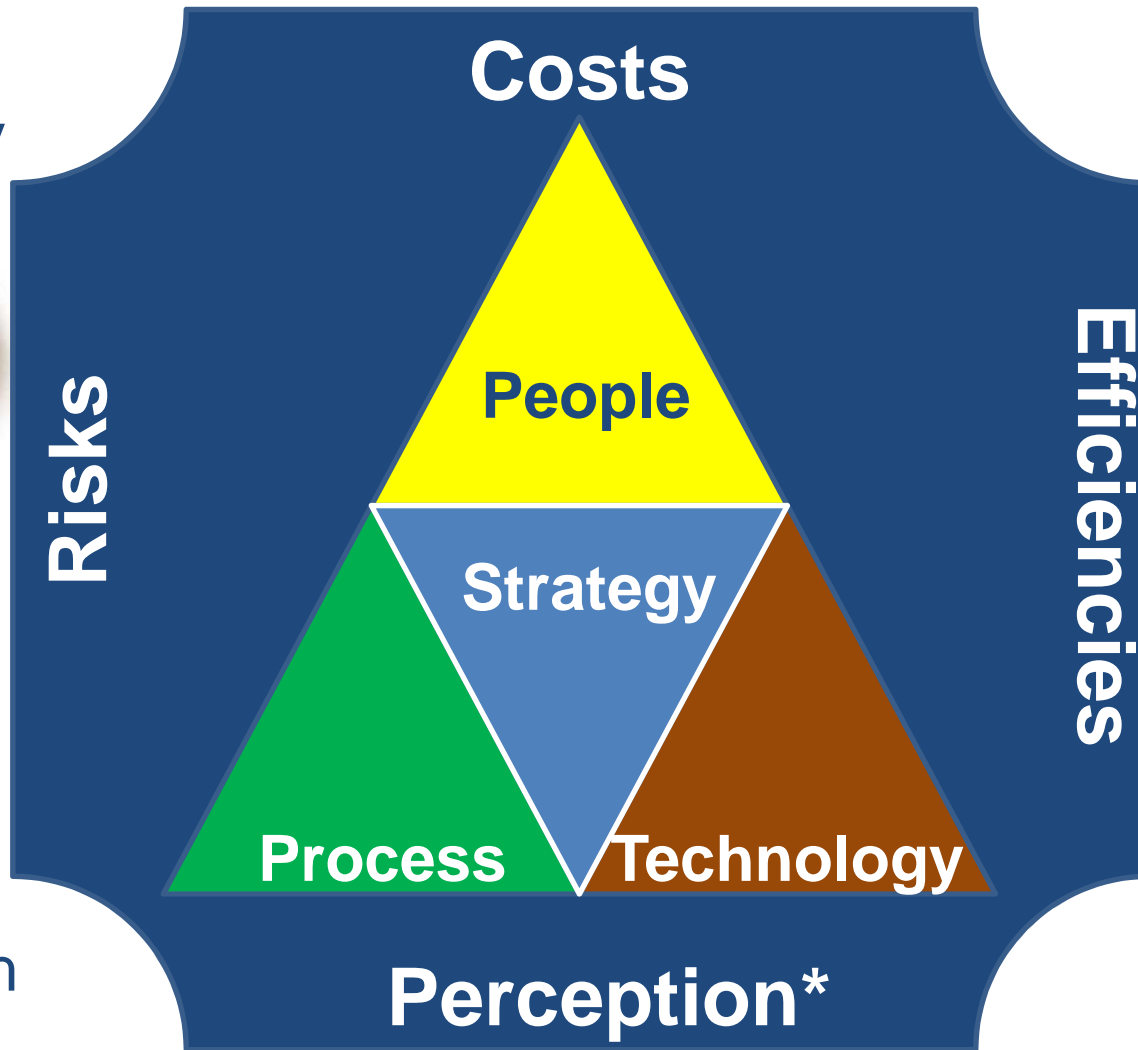
- 7. Prepare for crisis management situations by knowing where all meetings/events are occurring and monitoring participant well-being; fulfill duty-of-care requirements**
- 8. Capitalize on professional planning skill sets to ensure consistency and quality across all meetings/events**
- 9. Analyze and report ROI in addition to other metrics while gaining an average of 20% savings**
- 10. Automate processes to improve staff efficiency and maximize productivity**



Develop an Opportunity Analysis



Holistic Approach



*of Quality, Brand, Services, Products or anything that will affect **The Revenue**

By the industry's leading guru on Strategic Meetings Management

Assess your current state and design your Strategic Meetings Management Program by using this SMM Quick Reference Guide, and the SMM Maturity Model

SMM ROADMAP

QUICK REFERENCE GUIDE

Strategic Meetings Management
The Strategy Quick Reference Guide

A checklist of the:

- Risks of remaining status quo
- Activities to move toward a more mature program
- Best-in-class practices

by Debi Scholar

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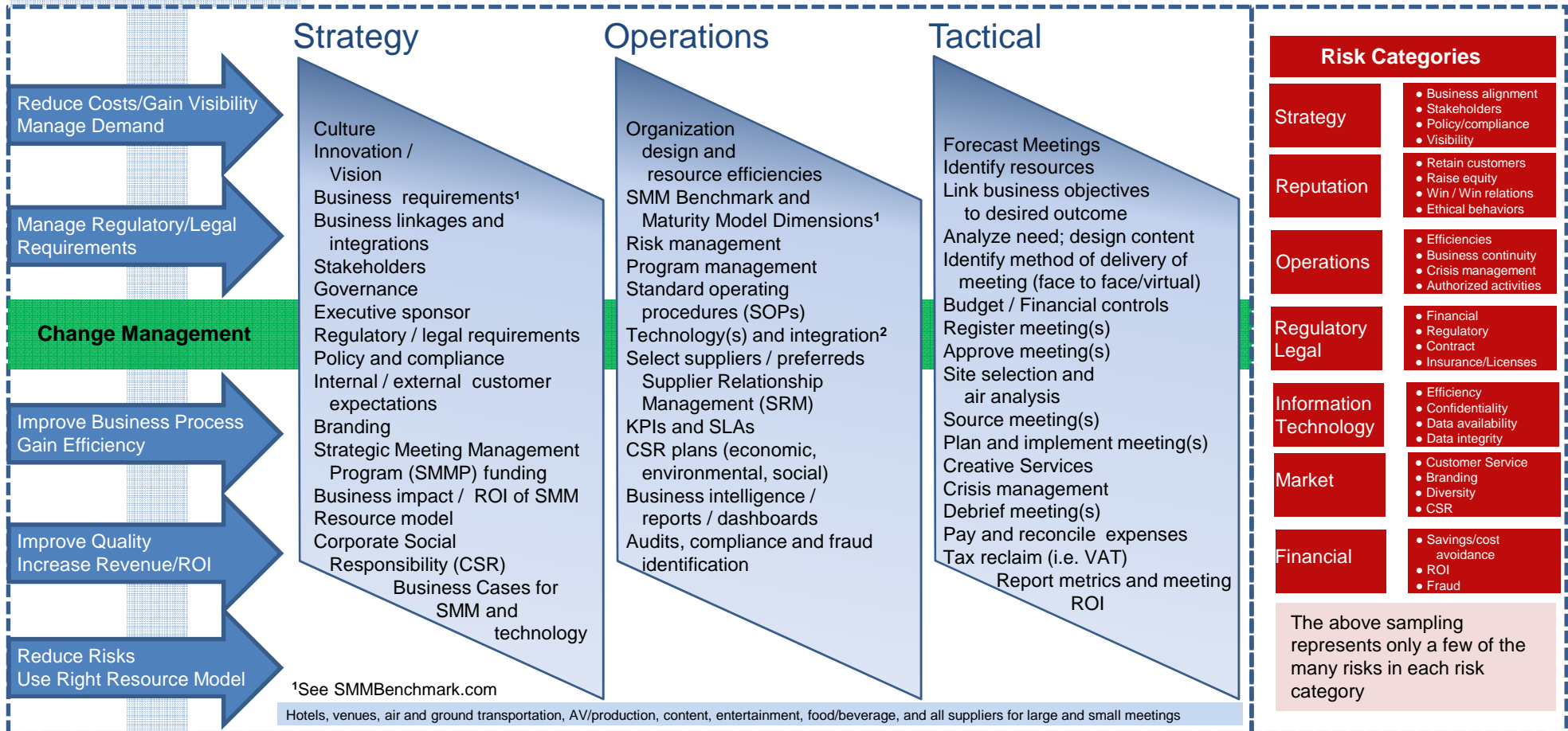
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Strategic Meetings Management (“SMM”) Strategy Articulation Map

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.



²Technologies 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. System³
- Customer Relation. Mgmt.
- Learning Mgmt. System
- Online Booking Tool
- Virtual Meeting Technologies³
- 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

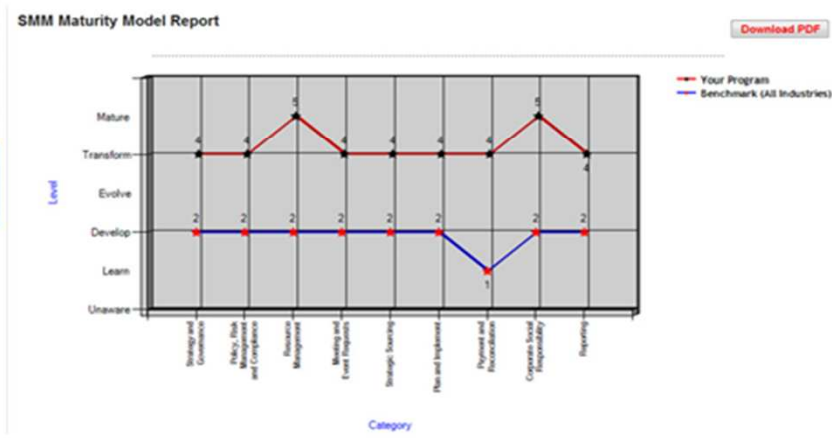
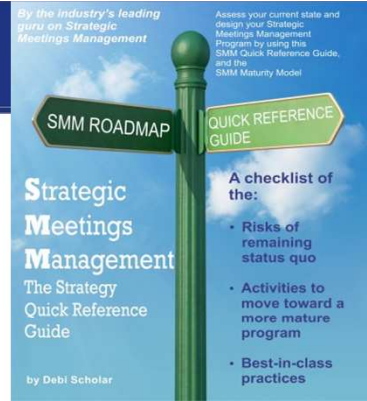
Maturity Level	Learn	Develop	Evolve	Transform	Mature	Components
1	<ul style="list-style-type: none"> Enterprise-wide strategy needed A person or group may begin to uncover meeting and event spend and volume Recognizes that the collective group of meetings and events may be an opportunity for savings 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 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 may be 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 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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 SMM 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 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> Strategy and Governance Policy, Risk Mgmt, Compliance Resource Mgmt Meeting/Event Requests Strategic sourcing Plan and Implement Payment and Reconciliation Corporate Social Responsibility Reporting



SMM Benchmarking

When you compare your business processes to other leading organizations, the resulting information offers a foundation to develop improvement plans that will guide you towards best in class, or mature programs.

To benchmark processes and obtain a free written report on your current Meetings Program, go to www.smmbenchmark.com.

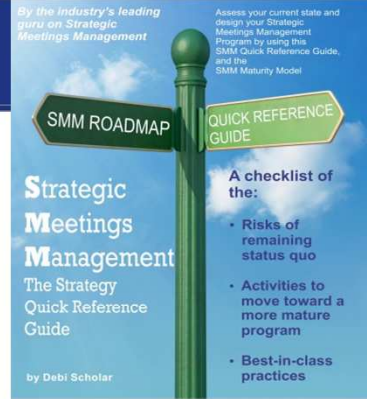


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Opportunities?
Risks?
Spend?
Technology?
SOPs?
Stakeholders?
Policy?
Compliance?
Payment method?
Staffing?
Suppliers?
SLA/KPIs?
Virtual Meetings?

**WHAT ARE YOUR CHALLENGES?
HOW CAN WE HELP YOU SOLVE THEM?**

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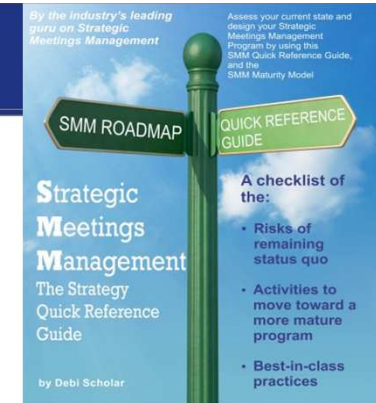
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Debi Scholar, President of Scholar Consulting Group

- Author of SMM: The Strategy Quick Reference Guide
- Co-author of the Strategic Meetings Management Handbook
- Consults with organizations, associations, education facilities, and suppliers on T&E, strategic meetings management, travel management, and virtual meetings
- Created the meeting industry's first SMM Maturity Model[©]
- Created two LinkedIn groups (T&E Plus and GBTA SMMP) with over 2,000 members
- Her blog, T&E Plus, has been viewed over 24,000 times and was described as a "must-read" resource by an industry trade magazine
- Previous co-chair of the GBTA Groups & Meetings Committee
- Previous MCAF member
- Previous GBTA Foundation Board member.
- Top 20 Changemakers in the Industry
- Business Travel News Practitioner of the Year
- VIPs in the Strategic Meetings Management Industry
- Contributes to HotelExecutive.com
- Contributes to Business Travel Executive magazines monthly.
- Edited the Travel Policy in the Business Travel Buyer's Handbook
- Managed the PricewaterhouseCooper's SMM Program and Group Travel for over 2,000 meetings and a budget of over \$200M
- First Meeting Director to have included Virtual Meetings under her direction back in 2002
- PwC Travel and Entertainment Consulting Lead and worked for the firm for 13 years



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Corporations, Organizations,
Associations, Government,
Colleges, Hospitals, Hotels, Travel
and Meeting Management
Companies, Suppliers

Reduce costs and risks
Improve compliance and transparency
Gain efficiency and improve service
Increase revenue and market share

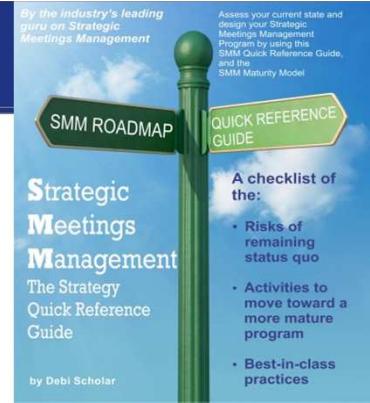


Debi's designations include:

- UPenn/Wharton Aresty Executive Education/Global Business Travel Association (GBTA) Global Leadership Professional (GLP)
- Meeting Professionals International Certificate in Meetings Management (CMM)
- Convention Industry Council Certified Meeting Professional (CMP)
- GBTA Corporate Travel Expert (CTE)
- PwC Six Sigma Green Belt (SSGB)
- Chauncey Certified Technical Trainer (CTT)

A Group of the most experienced professionals in...

- *Strategic Meetings Management (SMM)*
- *Travel and Expense Management (T&E)*
- *Virtual Meetings & Events / Hybrid*
- *Procurement, Sourcing, SLAs, & SRM*
- *Spend Analysis and Baseline Measurements*
- *Business Plan / Case Development*
- *Change Management & Training*
- *Project Management*
- *Resource Analysis & Management*
- *Benchmarking & Audits*
- *Data Intelligence, Metrics, Dashboards*



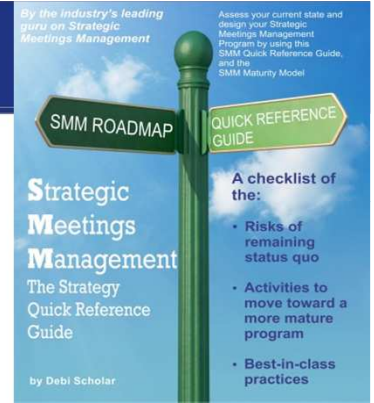
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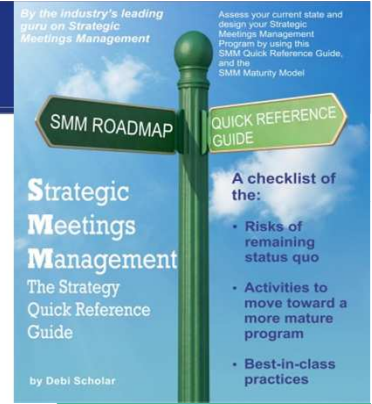
Appendix



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Key Stakeholders and Their Perspective

Chief Executive Officer - By understanding how the new initiative can benefit our clients and our shareholders, I can provide the governance model and support needed to move it forward.

Chief Financial Officer or Finance - By understanding the comprehensive costs of meetings/events, the resources, the processes and the technology, I can help the other leaders and the CEO control costs, maintain financial controls and mitigate risks.

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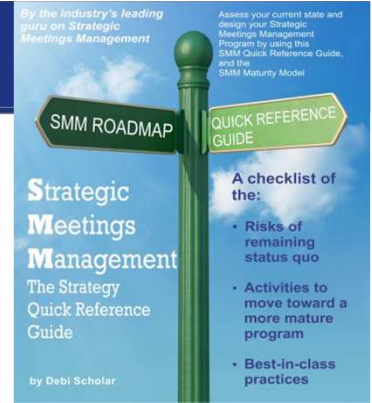
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Chief Operating Officer, Operations, Shared Services - By understanding the core processes and how they integrate within the various teams (travel, procurement, security, etc.), I can help streamline processes for maximum efficiency, shift resources to improve those processes that drive greater value and develop (or provide guidance on) standard operating procedures.

Chief Technology Officer or Information Technology - By understanding how the processes are enabled by technology, I can help by providing the resources and support necessary to assist with selection, implementation and support of the right technology.

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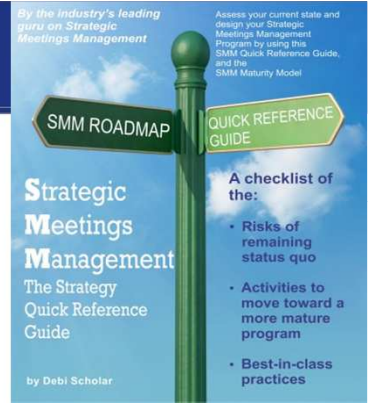
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Chief Human Resources Officer or Human Resources - By understanding the resource requirements to support the initiative, I can help by providing guidance on best practices on resource models, organizational design, searching and selecting the right resources.

Chief Marketing Officer or Marketing - By understanding the business purpose of the initiative, I can help by offering the marketing perspective, recommending ways to incorporate the flexibility that we need while still maintaining the controls necessary, and providing feedback as the “voice of the customer.”



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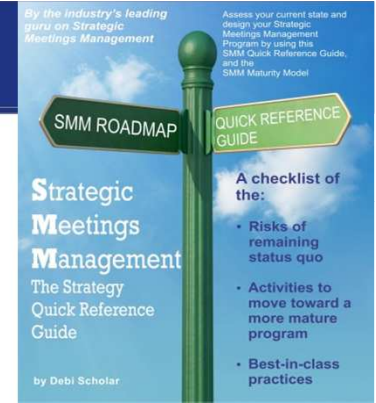
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Chief Procurement Officer or Procurement - By understanding the business purpose, costs, controls and supplier needs, I can help by providing procurement and supplier relationship management expertise to identify, select and maintain suppliers.

Meeting Requestors/Sponsors - By understanding the business purpose and how it affects my business, team, meetings, relationships, planning staff, processes, and budget, I can help by providing input and feedback as the “voice of the customer.”



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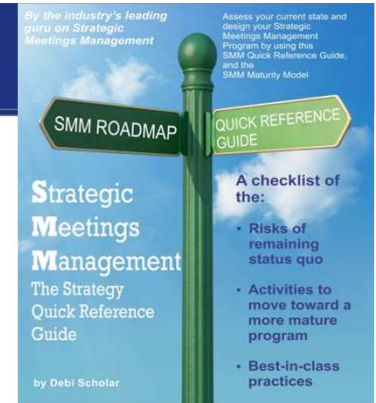
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Meeting Leader(s) - By understanding the organization's priorities, vision and mission, and with leaders' help and support, I can design a comprehensive strategic meetings management program that supports the value proposition.

Meeting Sourcers, Planners (professional and ad-hoc) - By understanding the business purpose and how it affects my job, I can help by providing the information about the current process, my customers' requirements, best practices and support to move forward.



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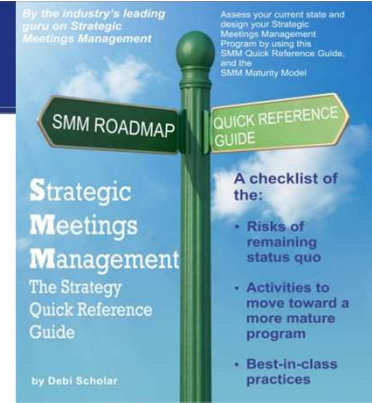
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Travel - By understanding the business purpose and travel requirements, I can help by providing the current transient and group travel processes, best practices in travel and support to move forward.

Legal - By understanding the business purpose, legal and contract requirements, I can help by providing guidance on legal language for contracts (or this activity may be through Procurement) and offering guidance on those staff members who are allowed to sign contracts on behalf of the organization.



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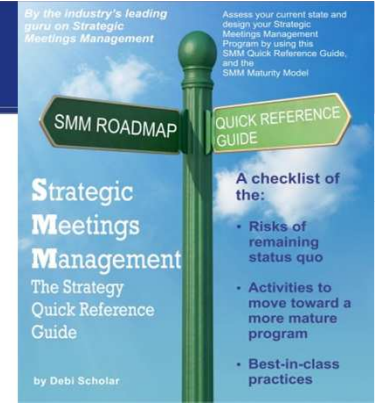
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Risk Management and/or Compliance - By understanding the business purpose and risk exposure, I can help by providing guidance on risk mitigation, compliance and reporting requirements

Security - By understanding the business purpose, security risks and crisis management needs, I can help by providing guidance on developing standard operating procedures for mitigating security concerns and crisis management plans.



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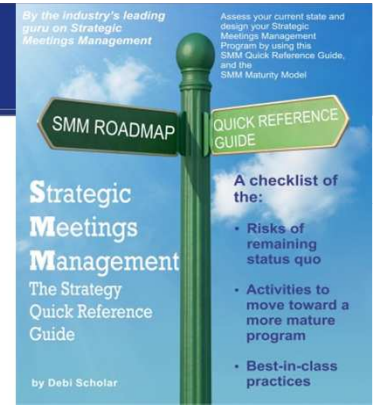
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Real Estate - By understanding the business purpose and the applicability of using internal meeting space, I can help by offering meeting space inside the organization when necessary and integrate meeting requests with the conference room request system as applicable.

Training and Development - By understanding the business purpose of the initiative, I can help by offering the training and development perspective, recommending ways to incorporate the flexibility that we need while still maintaining the controls necessary, and providing feedback as the “voice of the customer.”



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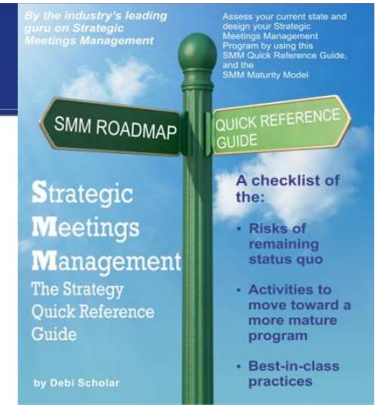
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Meeting Attendees - By understanding the business purpose and that my perspective is that of the “end user” of the services, I can help by providing feedback as the “voice of the customer.”

Suppliers - By understanding the direction of the initiative, I can help by providing information about the current process, the requests that I receive best practices from other organizations and industries, and support to move forward.



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