



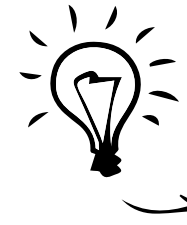
# Prepare for a Changed World

## Meetings Culture for Modern Companies and the New Normal

- Best practices and success stories from industry experts

groupize

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Prepare for a  
**Changed World**

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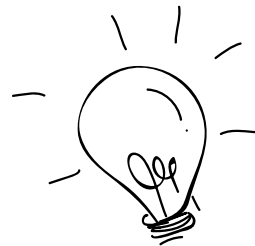
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# Introduction

This eBook is a compilation of best practices on how the industry will need to evolve the culture and approach to meetings management in this changing world. This peer to peer advice and framework for success comes from travel managers, meeting planners, procurement, TMCs, and industry partners.

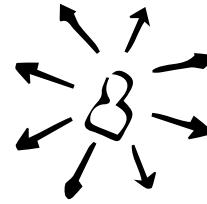
**Corporations are looking for easier, more efficient, and cost-effective meetings management strategies.**

Explore insights from industry experts on how they approach meeting management for the new world, including some of their lessons learned, best practices and successes.



# The Problem

## The Problem



# 1. We Had a Pandemic Brewing: What Can We Do Now?

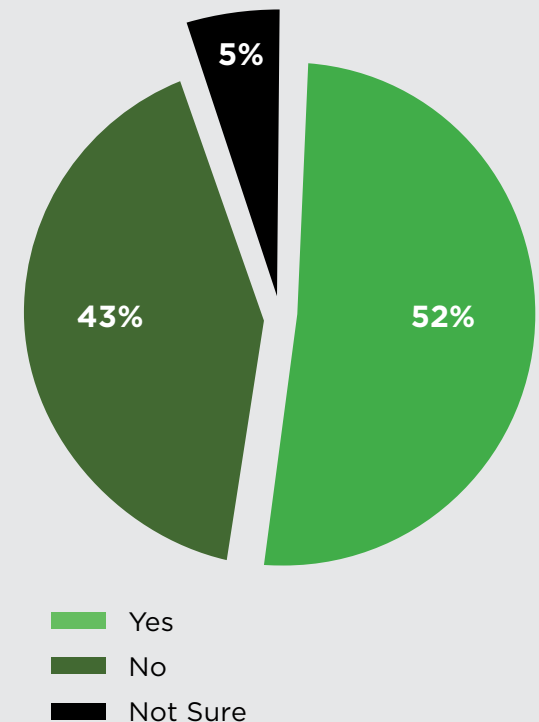
What would we do differently if we could go back 90 days?

Before this event, most corporations didn't know:

- How many meetings do we have?
- How much do we spend on meetings?
- How many admins are signing contracts, and what clauses they are signing?
- Where are our meeting attendees?
- How many \$25K-\$100K cancellation penalties do we absorb a year?
- What data security risk do we expose the company to with all these manual processes and unsecured tools?

## Only Half of Buyers Say Their Company Has a Managed Meetings Program

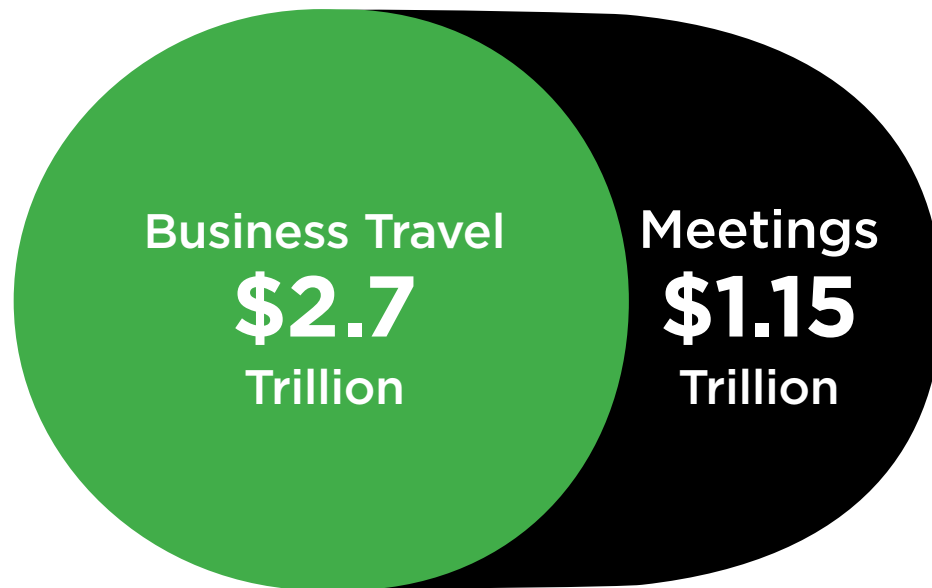
Does your company have a managed meeting program? (n=141)



2018 GBTA Omnibus Research

## The Problem

Meetings involved more than 1.4 billion participants



2018 study conducted by Oxford Economics



**“ Out of the \$225 billion spent in the U.S. domestic travel industry, 57% was for general business travel, and the remaining 43% was attributed to meetings. ”**

*- The Role of Business Travel in the U.S. (Economic Recovery) by U.S. Travel Association*

## The Problem

### 2. As an Industry - We Can't Ignore It Anymore

*“PhocusWright took the broadest perspective possible, defining a group to be two or more traveling overnight to one of more location(s) for a common purpose or event. The exception is day meetings.”*

*Groups and Meetings:  
Market Opportunity Redefined 2007*

**How can we, as an industry,  
overlook 43% of our travel spend?**

We all knew it was big,  
but it just wasn't anyone's  
responsibility. **It is Now.**

#### **What constitutes a group or a meeting?**

As an industry, we have traditionally defined a group as ten or more travelers. Phocuswright defines a group as two or more travelers to the same destination. When we think about it every business travel transaction is for actually for a meeting of some sort. It takes 2 to meet!

As an industry, we have visibility into the conferences and the larger meetings. However, we have little visibility into multi-travellers, day meetings to simple to complex meetings. As an aggregate, the spend and the risks are enormous. As a rule of thumb:



**ANTHONY PAOLA,**  
CMP, Managing  
Director, Meetings  
Operations, Sales &  
Strategy at Travel  
Leaders Corporate

**LINKEDIN** ▶▶▶▶



## The Problem

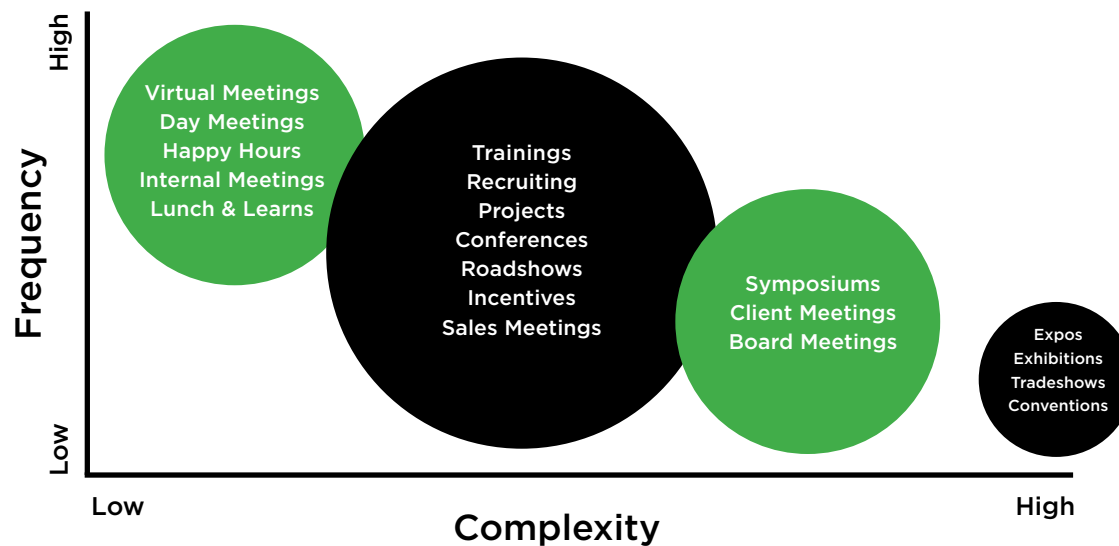
### Meetings by the numbers:

1-3% of a company's total revenue.

25-30% of total T&E spend.

60-120% of corporate air volume.

.5 to 1% of annual gross sales.



**“60%-97%  
of meetings  
can be  
defined  
as simple.”**





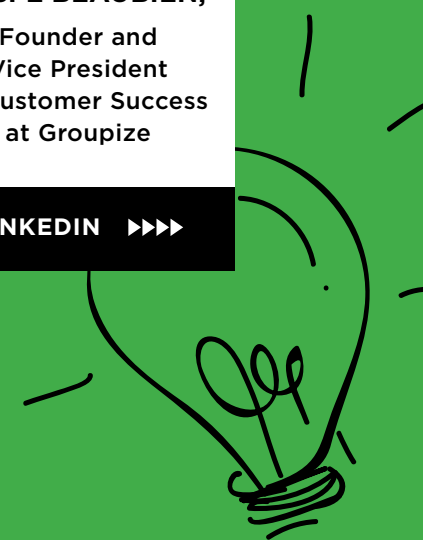
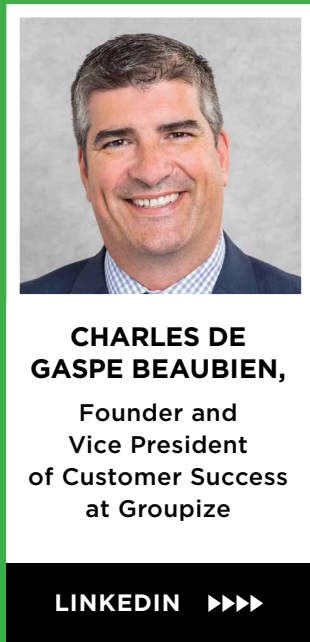
## The Solution

### 3. The Solution: Modern Approaches to Company-Wide Adoption

The “consumerization” of corporate travel technologies and the introduction of easy to use platforms facilitate gaining company-wide visibility and adoption.

New meetings technology entrants worldwide have been gaining traction over the last couple of years as they take a fresh approach to meetings visibility, controls, and spend management.

These newer technologies introduce the approach of self-service for meetings, mirroring the concepts of Online Booking Tools (OBTs). Corporations have all deployed travel programs to gain adoption of their transient spend. They can now revisit some of the pillars of those strategies as they approach modern meetings management with a hybrid of DIY for simpler meetings combined with a full-service model for more complex meetings.

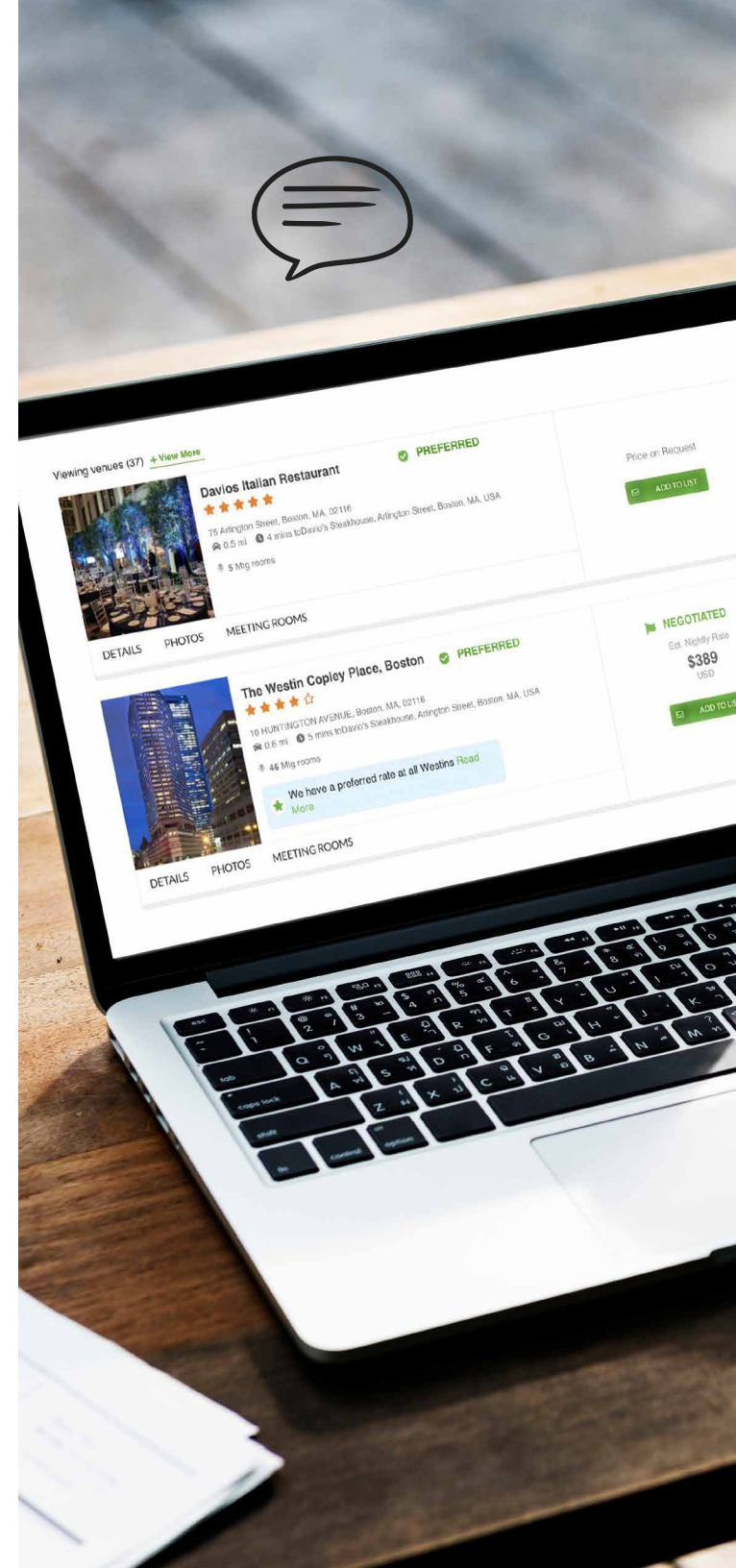


# Goals

## Goals

### 4. What Should You Care About? No One Answer Fits All...

- **Visibility:** Ability to “register all meetings” to a company calendar. How many meetings do we have? How much do we spend?
- **Spend Management:** Budgets, approvals, invoices, payment method, reconciliation.
- **Duty of Care:** Where are my travelers attending meetings?
- **Savings:** You can save 10%-20% with a meetings management program.
- **Risk Mitigation:** Who is signing hotel contracts?
- **Security:** Are we using GDPR compliant tools? What about PII?
- **Brand Integrity:** Do we put our best foot forward?
- **Productivity:** How much time can we save?



## Goals

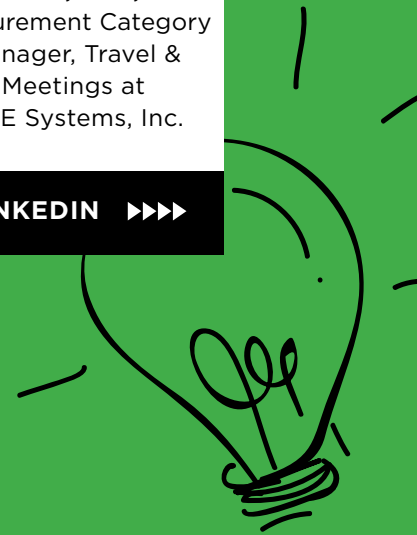
### 5. What are Savings? What Does Procurement Care About?

**Corporations can achieve an average of 10% - 20% savings when they implement best practices in sourcing, supplier optimization, processes, and policy compliance.**

What can you consider for savings?

Every procurement group defines it differently. You need to find your formula. Options include:

- Year-over-year savings (not apples-to-apples comparisons, but, how much does it matter to you or your organization).
- Savings from budget (business units hold a budget for their events, so how much you helped them to under-run this budget).
- Incremental savings (the differential between last year/last quarter and this quarter – could be savings or dissavings).
- Competitive bid process & negotiations. Savings could reflect the difference between the original quote and the final negotiated agreement.



## Goals

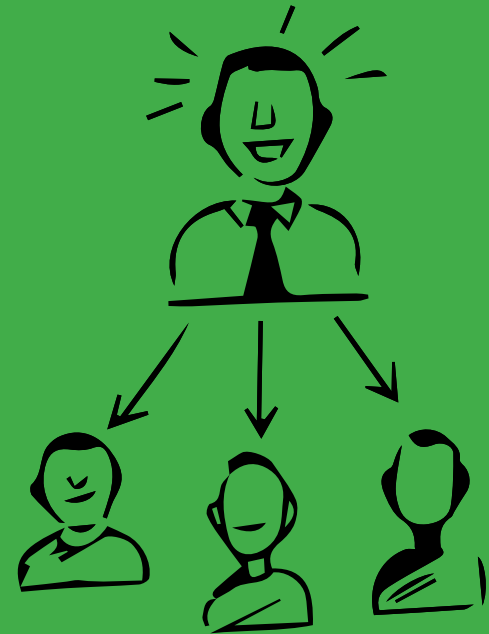
- BAR vs. negotiated transient rates (preferred hotel program) vs. group rates (this is a true market comparison – rates at the time of contracting vs. preferred hotel rates vs. negotiated group rates).
- Average attendee cost year over year (YOY) (again, not apples-to-apples).
- Savings achieved as a result of signing multi-property or multi-year agreements simultaneously.
- Group air (ticketing fees & booking window savings).
- Labor savings by moving to self-service (you define the parameters of what types of events can qualify for self-service – as long as the planner uses your prescribed tool(s) and efficiencies in sourcing and registration).
- Technology savings by not having user fees, lower licensing cost, implementation, and support of technology.



## Goals

**“ With one simple policy and support from Finance, I got 450 meetings registered year one and got the centralized financial data with no heavy lifting. I’m probably at 90% compliance already and can now focus on the next phases of my strategy.”**

*- Fortune 2,000, Company Travel Manager*



## Goals

### 6. What Does Security Care About?

While many 'security checklists' exist online, not all security needs are universal. You know there are risks to bringing people together, so selecting a venue that has defined, existing protocols can reduce the time you spend on ensuring the health and safety of your attendees. Going in, you should understand WHAT you are protecting beyond attendees – company secrets? Celebrity or political speakers? Executives? Innovation samples or exhibits? Party crashers?

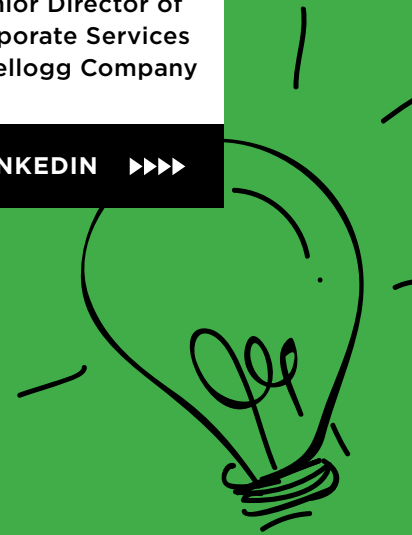
**Most professionals know to walk the venue with security before your meeting arrival date, to understand vulnerabilities actively modify strategies such as:**

- Is surveillance active or passively reviewed?
- Staff to entry point ratios? Fire exits and sprinklers?
- First Aid and first responder access?
- Was your list of contacts for emergencies distributed to the right people?



**CECILE MUTCH,**  
Senior Director of  
Corporate Services  
at Kellogg Company

LINKEDIN >>>>





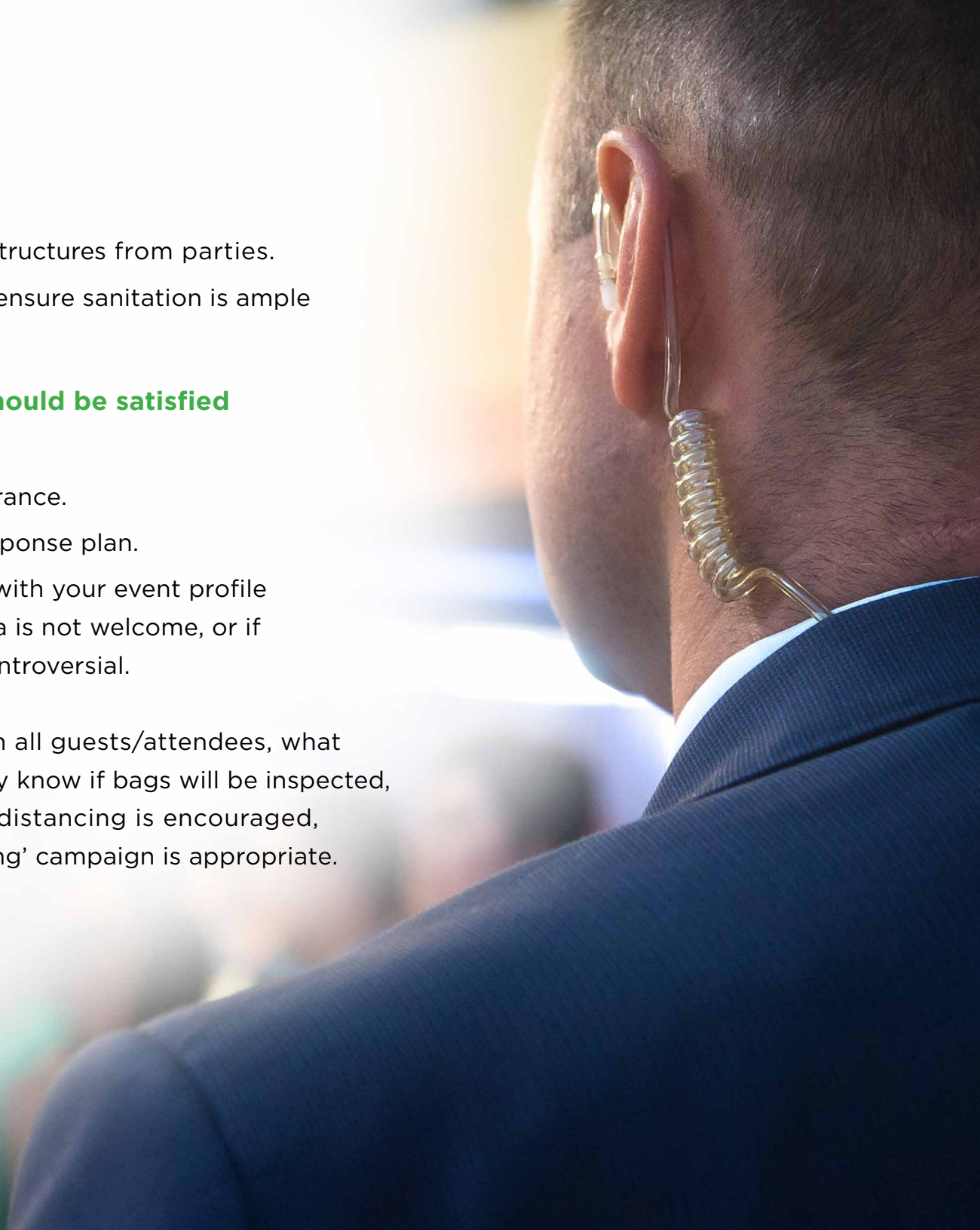
## Goals

- Removing or blocking risky structures from parties.
- Post-COVID-19 you'll want to ensure sanitation is ample and accessible to all.

### **But before you even arrive, you should be satisfied with the following:**

- The venue has adequate insurance.
- There is an Active Shooter response plan.
- The venue's prior experience with your event profile especially if it is large, if media is not welcome, or if your featured speakers are controversial.

You should communicate clearly with all guests/attendees, what to expect prior to their arrival, so they know if bags will be inspected, metal detectors will be used, social distancing is encouraged, and if a 'see something, say something' campaign is appropriate.





## Goals

### **Duty of Care and Data Visibility:**

Do you have visibility of 100% of your meetings?

- When and where are they being held?
- Who is attending your meetings, and where are they at all times?
- Who has approved the meeting expense?
- Was the contract reviewed before signing?
- What is your risk if the meeting must be canceled or postponed?
- Is your meeting data GDPR and PCI compliant?

We all just learned the challenges with the outbreak of COVID-19. If you had the data, you were able to support your senior leadership with their strategic decision-making as the crisis evolved. Data is key in a crisis. Those that didn't have a meetings program enforced had to scramble to initially determine which employees were in regions that were exposed and then had to determine if there were



## Goals

any executed contracts that exposed the company to risk if they needed to cancel or postpone the meeting. Without easy access to the data around the meetings and contracts, companies were forced to endure a fire drill to get the data. Decisions were made ad-hoc as opposed to strategically due to the lack of data.

And it is not just about the contracts and knowing what the location of the meeting is. You need to be able to access all the attendee data easily. Too many companies rely exclusively on GDS data, but typically that only includes flight data. The hotels bookings are typically offline in a room block, and not all travelers fly to events, so they will not be displayed in the GDS. This means that companies need to identify and approve the attendee registration solutions utilized in their companies, and these systems need to push data to the company's traveler tracking solutions. Again, these traveler tracking tools typically only pull transient travel data, and it needs to include your meeting data as well. It is no longer acceptable to only manage the large marketing & incentive events. You need to manage all groups that are greater than 2 people.



## Goals



**“ With my register your meeting policy, I now have full visibility into all my meetings globally. I can see where people are going, and if needed, where people have been.”**

# Best Practices + Success Stories From Early Adopters

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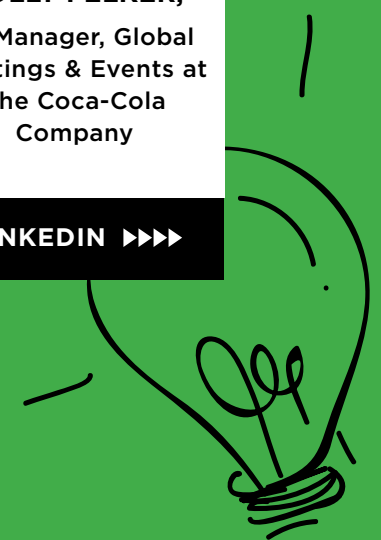
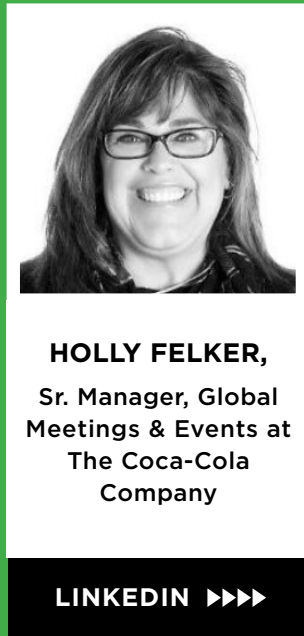
### 7. Best Practices for Driving Adoption of a Company Payment Policy:

A company payment policy is a key component of your meetings and events program. The policy will provide a clear and documented outline of the guidelines concerning meeting expenses and what is required to get expenses paid. The policy will also inform associates about the consequences of failing to comply with the policy and local payment terms.

Involving the right stakeholders when designing this process is crucial to its success. Partner with the business process owner to ensure the right control points are identified and integrated into the Standard Operating Procedures (SOPs).

#### Recommend engaging with at least the following groups:

- Finance
- Meeting Management Team
- Procurement
- Third party meetings agency
- Meetings management technology provider/IT
- Legal



## Best Practices + Success Stories From Early Adopters

Where a PO process is in place, ensuring that all teams are clear on the workflow and tracking of the process.

A similar process can be applied for other payment methods such as card products or inbuilt as part of a payment platform. If using a card method such as p-cards, meeting cards or corporate T&E cards, a level of reasonable control should be built into the process, possibly scaled by payment value.

A technology solution will increase automation in this process. For example, if you have a technology platform in place, the meeting could be required to be registered, a meeting ID aligned to the request and that ID must be issued before payments can move through for approval. This is a more advanced workflow and with technology integrations you can enable budget approval, card creation, assignment, and reconciliation as an integrated part of your meeting technology platform.

Average Attendance

**2,832**

43.0%

Average Response Rate

**4,034**

61.3%

Events by Stage



Events by Sourcing Stage



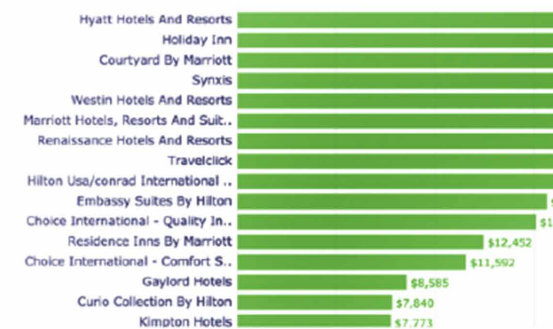
Number of Bookings

**607**

Book

**\$4**

Spent



## **8. The Convergence of Travel and Meetings**

**The key to success for these programs has a single common factor:**

**Data.**

**No matter how mature or integrated a program is, having an understanding of the data is a great place to start.**

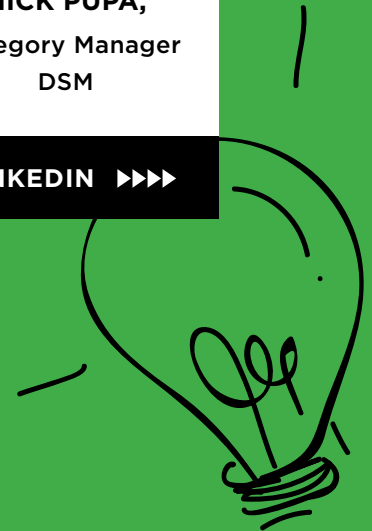
**If a program is just starting down this path, here are some ideas for quick wins:**

- Communicate with your internal peers about how to win together.
- If the meetings and events team is separate from the business travel team, schedule common supplier meetings together. Present suppliers with a united front.
- Share the business travel hotel strategy and preferred suppliers/venues with the meeting planning team.
- Leverage the new airline meeting programs for ALL meetings and events. The technology recently deployed makes it easier than ever to obtain meeting discounts and rebates.



**NICK PUPA,**  
Category Manager  
DSM

**LINKEDIN** ▶▶▶



## Best Practices + Success Stories From Early Adopters

**Now that your program is presenting a united front and the lines are starting to blur, let's lay out some ideas for where to go next:**

- Investigate and deploy integrations for tooling already in place for GDS-related travel data and meetings and events data.
- Use combined commercial leverage to source technology platforms that service both the business travel and meetings and events programs.
- Where possible, leverage business travel agency FTE peaks and valleys to liaise with meeting planners on group air, attendee registration, and attendee management.
- All supplier review meetings should be combined – all data should now be presented as a single point of reference.





## Best Practices + Success Stories From Early Adopters

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**If you are ready to be Best-in-Class, here are the keys to success:**

- Integrated business travel, meetings and events websites.
- Business travel and meetings and events policies are cross-referenced within each.
- Meetings and events have the same Duty of Care requirements as business travel.
- All data streams are shared and available to the combined team.
- Make group air benefits (points/miles) available to internal meeting requestors for site visits or meeting-related travel to show the tangible benefits of working within the boundaries of the program.



**“Consolidation has grown 62% since 2015. If consolidation adoption continues at this rate, two-thirds of programs will be fully consolidated.”**

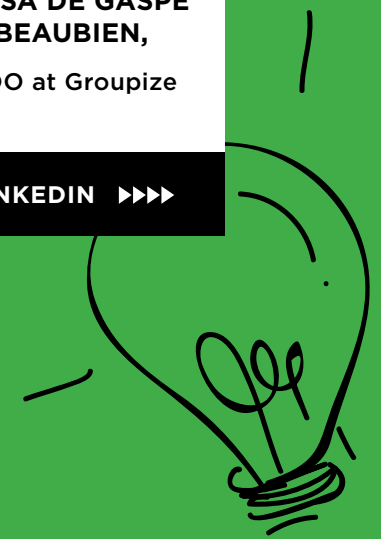
*- Cvent & GBTA Shifts, Trends, and Status Quo December 2017*

## **9. Self-Service Air with SAP Concur as Part of Convergence**

**Use your online booking tool to provide self-service or track air spend for your meeting attendees.**

Meetings are one of the last areas where flights are booked in a full-service process. This means full-service costs and a process that breaks with how we book most of our business travel. Why not integrate your online booking tool, like Concur Travel, to your attendee registration process?

- Significant cost savings on fees when you switch from full-service to self-service (estimate \$50-\$75 to est. \$10- \$15).
- Significant savings of the air tickets: With a meeting or event, you know the primary travel dates so you can better enforce the optimal 10-14 booking window. EY estimates that flights



## **Best Practices + Success Stories From Early Adopters**

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booked outside the 14 day range, ticket price savings are in the 18-22% range. These simple savings can far exceed the negotiated savings on the venue or sleeping rooms!

- Integrations with Concur Travel enable the meeting planner to see all the flight details without having to get reports from the travel departments. This process savings is significant when you consider the last-minute flight and schedule changes that occur. These changes can not only impact the arrival & departure pickups but also enable you to change your minimums for events like your opening or closing receptions.



**“ Businesses looking to optimize their travel spend can save an average of \$200 per domestic flight simply by booking six weeks in advance of departure date.”**

- SAP Concur

### **10. No one size fits all. Segmenting your Meeting Tiers and workflow with rules**

Understand your mix of meetings. Odds are 60% or more of them are Simple. Don't use the same processes and labor model for all meetings. Self-service of meetings within many programs is a new phenomenon that works in conjunction with full service. Keep in mind that self-service meetings have been happening outside of your program for as long as meetings have been planned. It's time to let the experts add value where it is most efficient, either at specific points in the planning process or more complex meetings, and bring everyone under one big tent.

**Use rules to break down your meetings by size, type, budget, level of risk between occasional planners and professional planners.**



**NICK PUPA,**  
Category Manager  
DSM

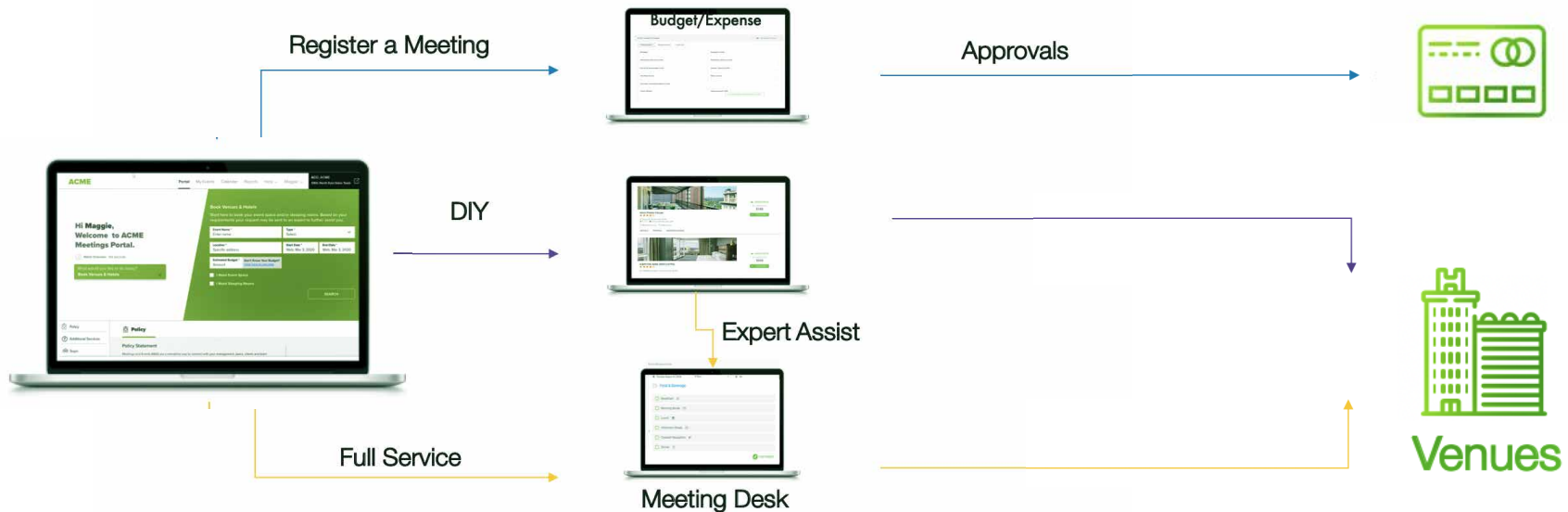
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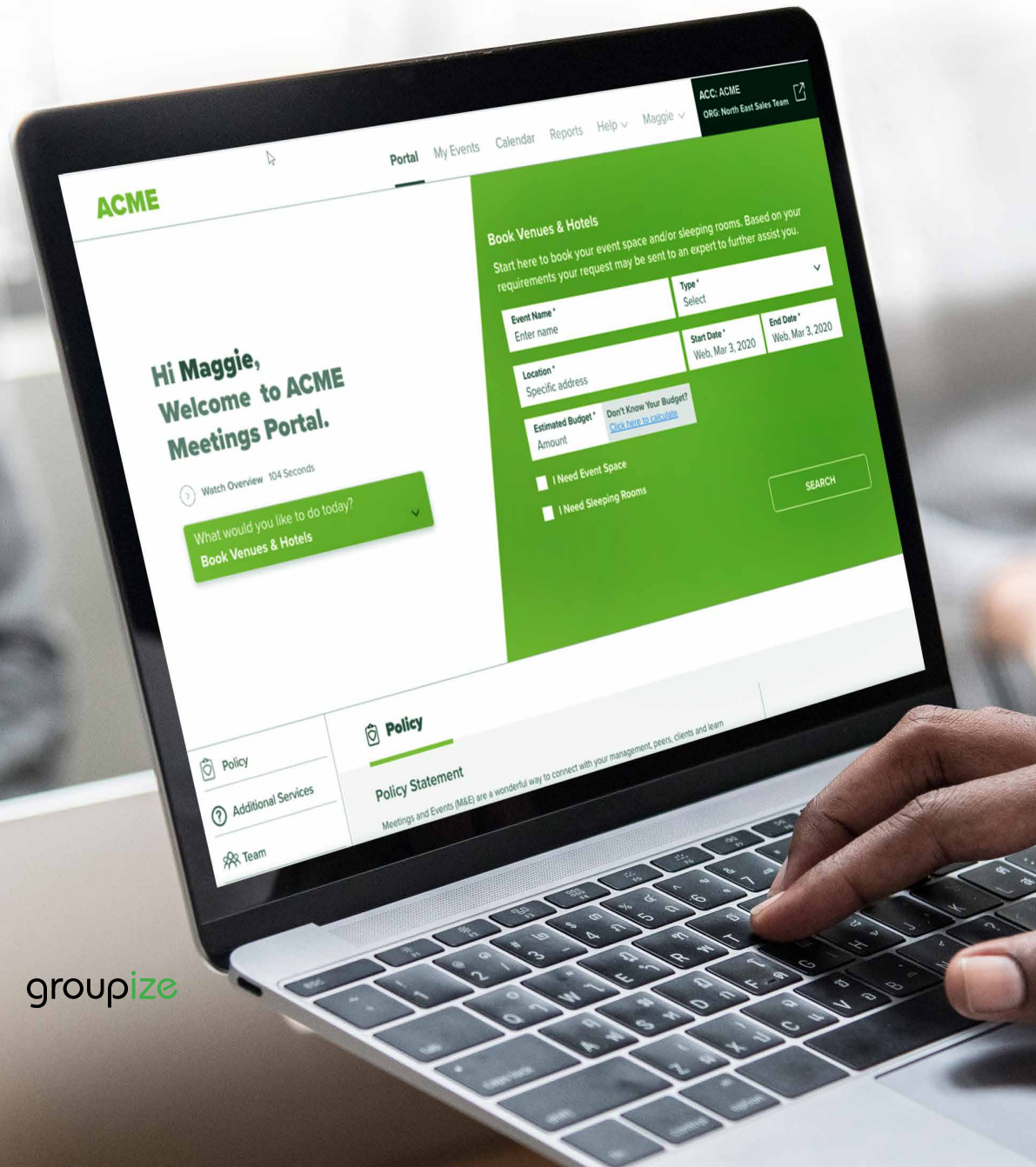
## Best Practices + Success Stories From Early Adopters

### For example, five tiers:

- Venues and Meetings under \$5,000 = register.
- Meeting at hotels under 50 people and \$25,000 = Self Service.
- Meetings of over 50 people = Full service via your planners or agency.
- Conferences, Incentives = Meeting Planning House.
- Meetings in a box (using your third-party additional services).



## Best Practices + Success Stories From Early Adopters



Whether you use several partners globally, or several technologies, the goal is to centralize the data.

## **11. Why You Need a Policy and What It Should Include**

You have a travel policy, yet likely you don't have a meeting policy. The unprecedented number of recent meeting cancelations and postponements as a result of COVID-19 emphasizes the need to have visibility into all meetings on an enterprise-wide basis. Yet, according to the 2018 GBTA Omnibus survey, 49% of GBTA members don't have a meetings management program in place. A meeting policy is the foundation of a managed meetings program, just as a travel policy is the basis for a managed travel program.

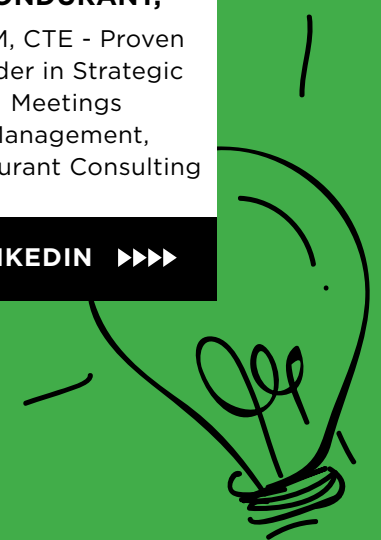
Best-in-class meetings management programs reflect business travel programs in that they provide needed guidance, require the use of online technology for registration and managing participants, have approvals prerequisites, and use reconciliation procedures. Companies with meetings management programs in place were able to provide quick and accurate reporting to business owners and senior leadership, resulting in timely and sound business decisions.



**BETSY  
BONDURANT,**

CMM, CTE - Proven  
Leader in Strategic  
Meetings  
Management,  
Bondurant Consulting

**LINKEDIN** ▶▶▶▶



## Best Practices + Success Stories From Early Adopters

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### Meeting Policy Concepts:

- Don't over-complicate the policy, be as simple as possible.
- Define "meeting" for your company. 10/10/10 may be outdated. Don't limit self-service capabilities to less than ten rooms, or ten attendees or \$10,000 budget.
  - Create meeting tiers/types with complementary workflows. Some might use different technology tools, be self-service, or full service.
- Include user-friendly tools and processes that make life easier for occasional planners.
- Identify who is responsible for contract review, negotiation, signature, and management.
- As the industry recovers, getting meetings approval will be more important than ever. Build automated approvals into a centralized process that doesn't impede the sourcing progress.
- Most companies have a procurement policy that has a three-bid minimum policy. Include the three-bid minimum in your meeting policy. Positive results can be immediate: "Instead of going to our usual hotel, we asked for three bids, and we saved \$5,000 on a \$25,000 meeting just by competitively shopping it."
- Create a mandatory hotel addendum or simple meeting contract with pre-determined business terms.



## **Best Practices + Success Stories From Early Adopters**

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- Define invoice reconciliation and budget to actual data entry requirements.
- Consider deploying a meetings card for payment of smaller meetings. Include in the policy if this is the preferred payment method.

### **Tips for policy adoption:**

- Integrate the meetings portal with travel portal via SSO to gain company-wide adoption.
- Create a communication plan and include gamification, educational sessions, and leadership endorsements to gain interest in the new policy method.
- Make your champions and admins advocates by sharing their feedback.
- Share the success of the program: savings, cost avoidance, visibility to volume, top suppliers.

**“ It makes finding a venue for a meeting so much less time consuming and much more user friendly. You can put your feelers out, continue working until someone responds, and you can go from there, without hours and hours of phone calls, and the follow-ups are great.”**

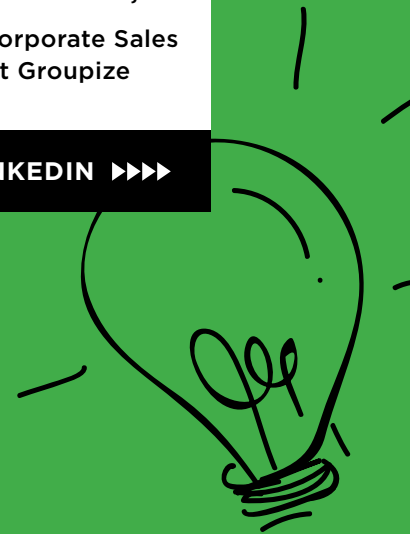
## **12. Supplier Optimizations: Curate Your Hotel Program and Communicate It Company-Wide**

Although event venues and locations tend to be ad-hoc decisions, there is a significant savings opportunity to leverage your existing transient traveler program and supplier relationships and integrate this into your meeting program. While some larger events may be held in locations that are outside your normal travel locations, the majority of your simple events probably overlap with your transient travel pattern. Utilizing these same properties for transient and group business has the dual impact of increasing the volume for your transient program as well as leveraging the existing relationships for your group events. This is true at the property as well as the brand/chain level.



**JAY REILLY,**  
VP Corporate Sales  
at Groupize

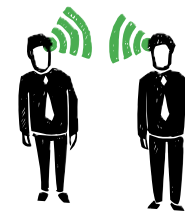
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## Best Practices + Success Stories From Early Adopters

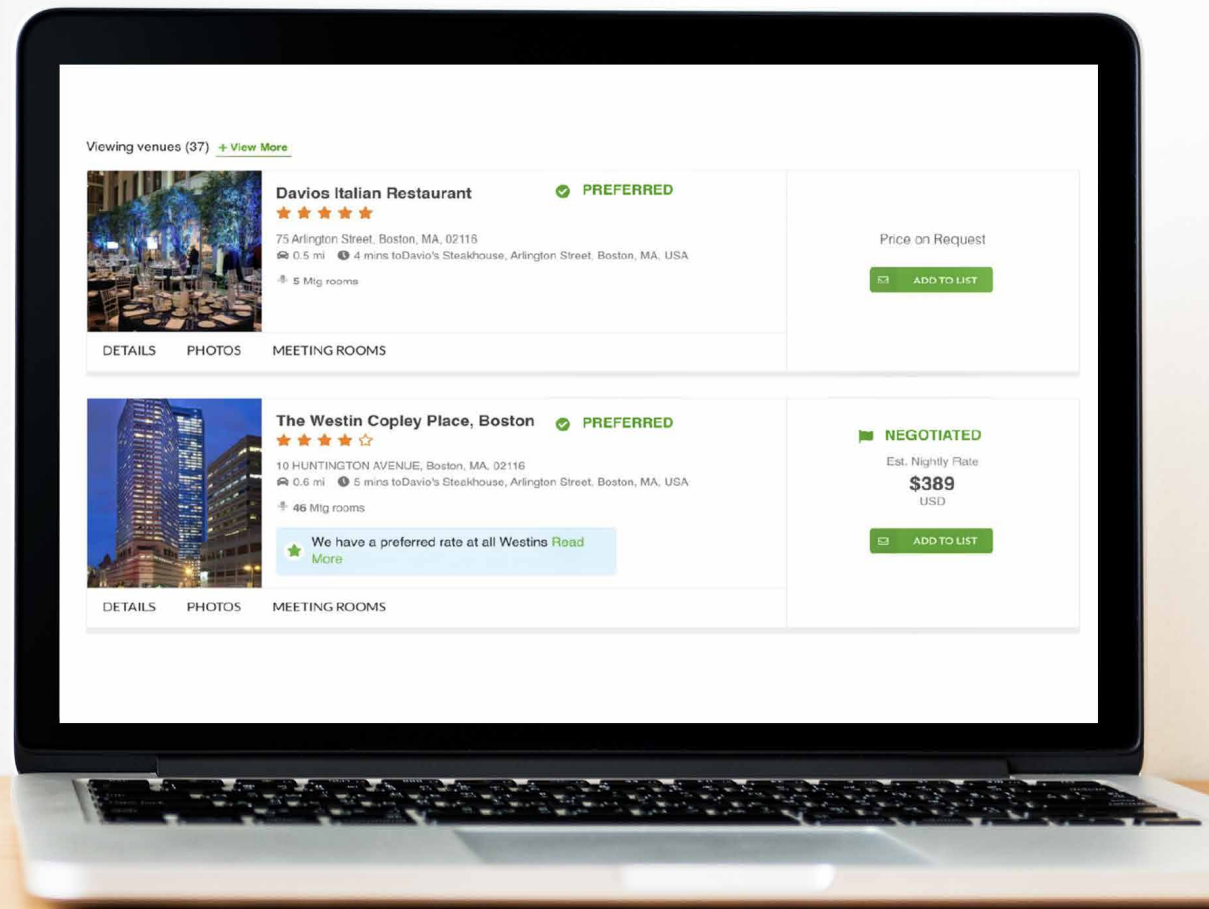
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- Highlight your existing negotiated transient rate when planners and admins are shopping, so they have an instant benchmark price on the specific dates they are considering.
- Highlight if you have negotiated any special meeting packages with your preferred properties. This is especially true for properties where you may have recurring events like training or recruiting or monthly sales meetings. It can be a simple offer of a discounted room rate and a package deal for the meeting space with F&B and Audio-Visual packages pre-negotiated with basic terms. Then the process shifts from an RFP to a simple check for availability, negotiation, signature, and management.
- Highlight any re-sell opportunities of canceled or postponed events. In many cases, you can use up the canceled space from a previous event by booking smaller groups that consume an equivalent amount of revenue for the property. This, of course, needs to be stated in your contract, which is why it is so important to have a solid contract review process.
- Ensure that your Global and National Sales reps are associated to all bids you submit so they can support your larger brand/chain relationship down to the property level, especially if you're working with a property for the first time.



## Best Practices + Success Stories From Early Adopters

“ Now I can steer my meeting('s') towards my preferred hotels and track and try to re-use unused inventory internally.”



## **13. What to Do About Cancellations and Attrition**

The conversations surrounding cancellations and attrition with your suppliers and event providers have always remained critical and crucial. Given the current global influences and pandemic impact, these discussions are especially paramount and essential. Business event strategists need to understand the implications and impact of special agreement provisions relative to their respective organizations and attendees during these unprecedented times. While the full scope of total risk assumptions and financial obligations are not always specifically realized by the organization initially, the meeting professional can and should work with their suppliers to minimize the negative impacts as it relates to cancellation and attrition and other contract performance.



**GARY MURAKAMI,**  
CTC, GTP, GLP, CMP,  
CMM, Director,  
Global Sales at MGM  
Resorts International

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## Best Practices + Success Stories From Early Adopters

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### Performance Clauses

A first step in the process of evaluating your current existing and/or future program would be to review the clauses in the event contract(s). It is critical to process the cancellation and attrition terms, as well as review of the force majeure clause to understand the financial and performance implications of the agreement. Contracts may or may not have specific clauses, which includes language that provides for the alleviation of certain obligations or mitigation, and event professionals will need to be aware of the agreement commitment.

### Contract addendum and small meeting contracts

Opportunities exist for meeting professionals to re-negotiate and to conduct discussions with your hotels/venues regarding your agreement and performance implications. Based on specific market conditions and nature of the program, there may be an option to discuss an addendum to an existing agreement to facilitate the program to meet contractual obligation and

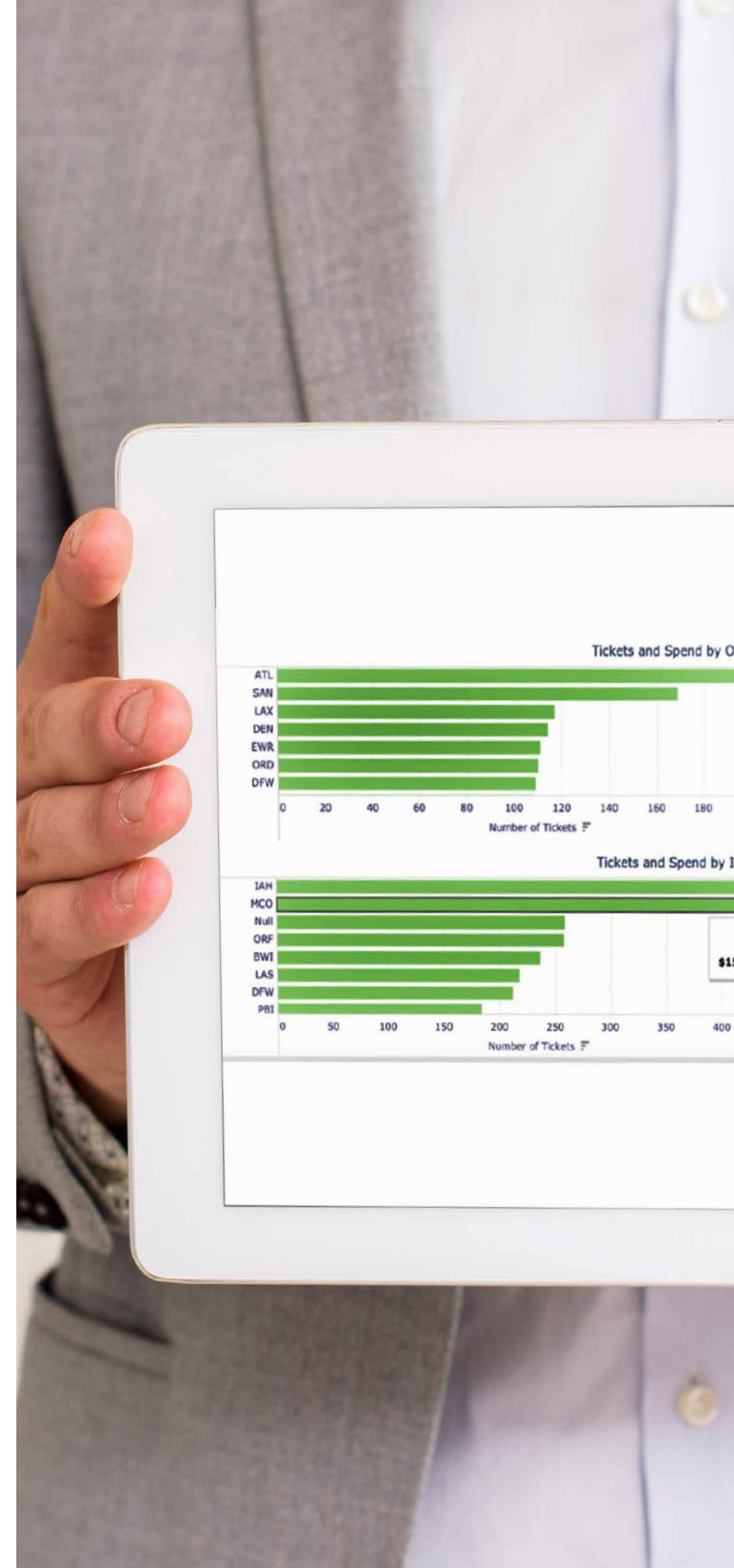
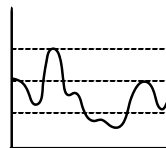
**“ I can now have my pre-approved hotel addendum automatically sent to my hotels with every meeting.”**

## Best Practices + Success Stories From Early Adopters

performance clauses in a modified way. Every event and program has a different value to the hotel, and it is imperative to understand how the hotel evaluates the specific program and its impact on that venue/facility.

### Re-selling attrition

Understanding the performance of your room block agreement will assist in the conversations surrounding possible attrition. Given the impact of unforeseeable events to possible reduced performance of the agreement, event professionals will need to understand ways, if possible, to mitigate any shortfall or damages owed. Market conditions, program's value, and business impact will facilitate a discussion relative to re-sell opportunities to impact attrition.



## Best Practices + Success Stories From Early Adopters

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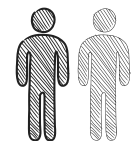
### Work with your chain

Relationships and open communication with transparency matters. During the current climate, it is especially critical to have these honest and timely communication and dialogues with your sales representatives from the hotels and venues, including your global/regional chain contacts, to ensure visibility and transparency of your event status and to provide essential updates.

Each hotel or venue evaluates the event summary and scope differently. Meeting professionals must be able to understand the position and perspective of the supplier to understand how they are viewing one's specific program or event. Event professionals also must share their position and situation, and together with the supplier, hopefully, find a mutual resolution.

### Moving forward

The current global crisis has articulated the importance of strategic partnerships and precise agreements to ensure mitigation of risk and increases the value and the importance of a meetings program. Visibility and access to negotiated agreements that expose the company to financial and legal obligations emphasize the importance of minimizing risk in addition to access to critical data of meetings category spend and usage. The further conversation surrounding event cancellation insurance and other ways to mitigate risk in future commitments should also be evaluated and possibly implemented into the meetings program.





## **14. What Role Should My TMC and Third-Party Play?**

Most TMCs support hybrid models of self-service and full service. Find a partner that can give you the most bang for your buck while making you successful. Define your roles when it comes to strategy, implementation, additional services (such as room blocks, registration, air), negotiating, contract supervision, supplier optimization, reconciliation, and data.

Utilizing a third party planning company gives an organization's meeting planner time to handle the meeting content while outsourcing the tactical details of the meeting. These companies and individuals become a consultant or trusted advisor based on their experience and industry relationships. They work with a variety of organizations and gain insight into locations, vendors, experiences, and events. In addition, they develop best practices by working with other clients and can bring a fresh perspective and new ideas to a company's event.



**DEBORAH BORAK,**  
CMM, SMMC,  
Vice President/  
Team Director  
ConferenceDirect

**LINKEDIN** ▶▶▶▶

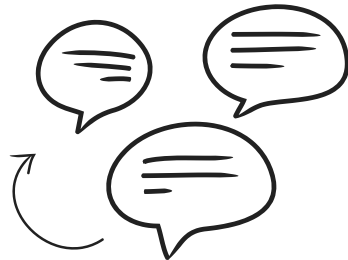


## Best Practices + Success Stories From Early Adopters

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### Third parties leverage their expertise to help clients:

- ✓ Develop RFP's for Site Search and Selection
- ✓ Negotiate Contracts
- ✓ Reduce Costs
- ✓ Leverage Buying Power
- ✓ Minimize Risk
- ✓ Save Time
- ✓ Enhance the Attendee Experience



With organizations doing business differently at the moment due to layoffs and furloughs, the role of the independent professional planner is more important than ever in our industry as they can supplement the internal team and become a much-needed extension for organizations. The biggest advantage of outsourcing is that you only pay for services when you need them. That way, you don't pay for staff or benefits when they're not needed and can scale as the work changes.

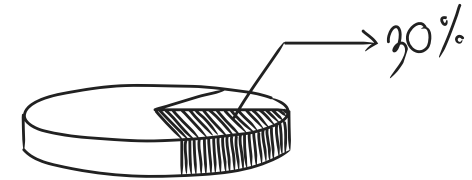
Often third parties have well-established partnerships with a variety of vendors and provide a centrally managed approach to supplier interaction.

## Best Practices + Success Stories From Early Adopters

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**This allows them the ability to effectively locate the right vendor for their client to handle a variety of services, including:**

- Audio Visual & Technology
- Destination Management Companies (DMC)
- Exhibit/Sponsorship Sales & Management
- Duty of Care/Emergency Preparedness
- Event Services
- Event Design
- Housing Tools
- Insurance
- Mobile Apps
- Registration Services
- Security Firms
- Transportation Companies
- Virtual Meetings Platforms



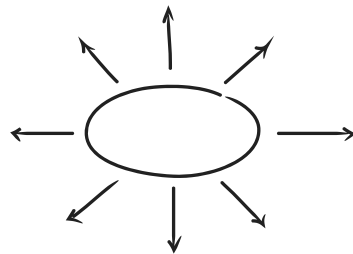
Take this time to evaluate all contracts in place between now and the end of the year. Once hotels and venues begin opening their doors and we start gathering again, it is not likely there will be 100% attendee participation – companies need to plan for that. Also, be sure to review future contracts and ensure your clauses address the specifics necessary to move, cancel, or rebook a meeting moving forward. A third-party partner can assist with this task, oftentimes even if they weren't involved in booking the event, as a way for you to evaluate their services.

## Best Practices + Success Stories From Early Adopters

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TMC business travel agency or corporate travel provider is **a travel agent that fully manages the business travel requirements delegated by an individual, company, or organization to fundamentally save clients both time and money.**

TMCs typically use a GDS and provide an online booking tool for flights. They often analyze current travel spend and provide expert knowledge in all aspects of the travel industry. A TMC can help expedite your understanding of threatening situations in areas where you have travelers and provide services to those travelers.



Third parties and TMCs are both “third-party providers” from a definition perspective, and as such, there is no difference. TMCs also have Venue Sourcing and Meeting Planning, so a TMC is often considered a third-party provider.

Third party providers are funded by commissions or are fee-based. Many support hybrid models of self-service and full service, so find a partner that can give you the most bang for your buck, while making you successful. Define your roles when it comes to strategy, implementation, additional services (such as room blocks, registration, air), negotiating, contract supervision, supplier optimization, reconciliation, and data. Sometimes one size doesn’t fit all, and you may find you need two partners to manage the workflow.

### 15. Funding Meetings Models

Overarching funding options for meetings management programs can be summarized at the highest level below:

**Centralized funding** - A single budget for all/set scope of meeting services provided and managed across an organization. We often see this budget sitting with and managed by Procurement.

**Decentralized funding** - Meeting service fees are charged back to business units based on usage (per meeting rate card or % based), or a fixed cost is included as a shared service line item. These can be distributed either from a central fund and passed back through a finance function; or paid at point of service delivery.

**Commission offset** - Commissions are typically used to partially offset costs or fund other meetings related items such as technology or additional resources. While some strategic sourcing programs are fully “funded” through commission, a value/cost for this service should still be accounted for as a budget line item for an organization.



**SHAUNA  
WHITEHEAD,**

Vice President,  
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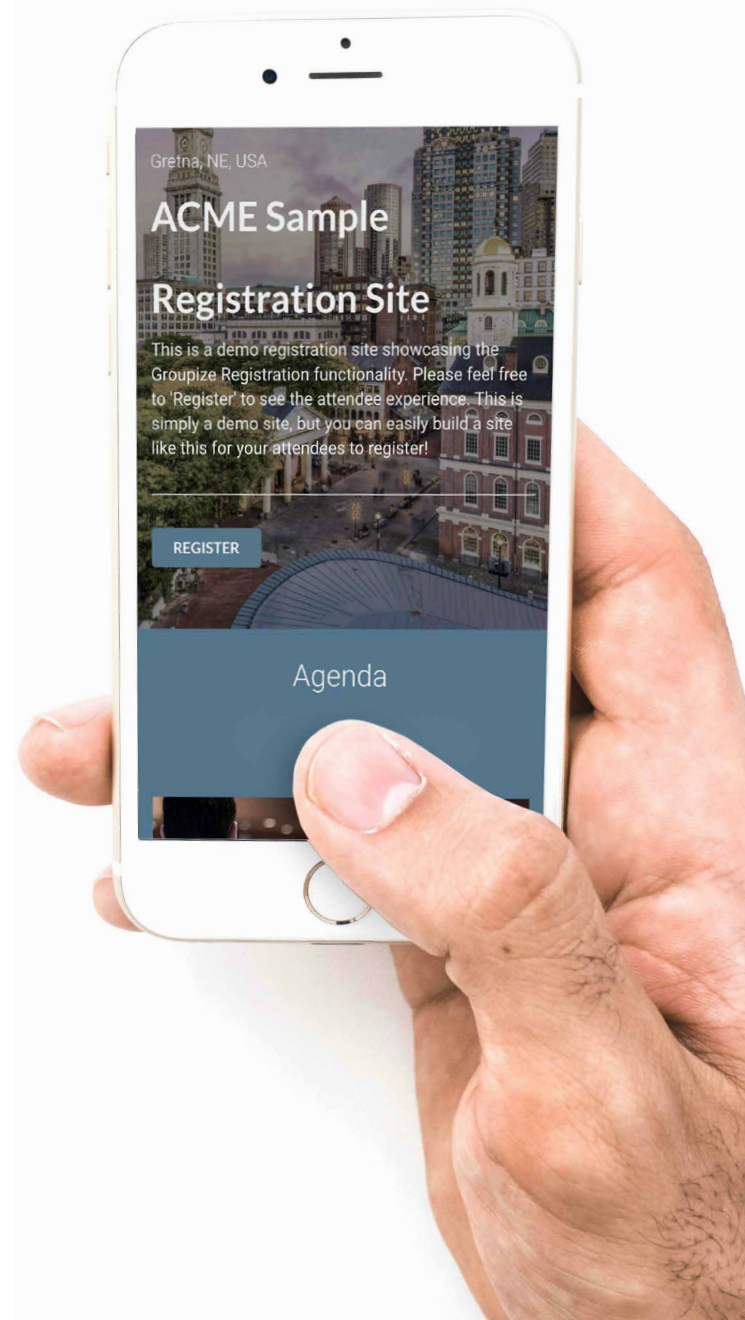
## Best Practices + Success Stories From Early Adopters

Relying on commissions to act as a “free” service for sourcing, or core revenue stream should be cautioned, both given industry factors such as declining hotel commissions; as well as disparity of the ability to deploy such a model in all markets and regions, globally.

It is important to have a well-established business case for your strategic meetings management program, where the true value and return in investment (be it offset or not) in having a meetings program can be clearly articulated and communicated within the organization.

The most appropriate funding model for your business will vary greatly across businesses; considering several factors such as tolerance for change, shared service infrastructure, guaranteed volumes, services in scope, executive buy-in, stakeholder engagement strategy, and meetings management program maturity.

Credit card rebates, where a meetings card program is in use, can be an additional revenue stream to also offset costs or deliver funds to a program.



# Technology



## Technology

### 16. How to pick a software:

While legacy event planning solutions have been consolidating, new players are emerging that allow for new functionality and allow for more cost-effective licenses.

If you are looking for event technology, do your homework. There are many options, and it can be overwhelming. Talk to you TMC (travel management company), MMC (meeting management company), or industry colleagues for advice and assistance.

**There is no one size fits all solution.**

**The first thing to do is to identify the gap you are looking to fill and make a list of what's important to you.**

1)...  
2)...  
3)...



**KATHY GRAU,**  
President Elect,  
MPI NJ Chapter,  
Chief Strategist at  
Grau Consulting

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## Technology

### Here are some things to consider:

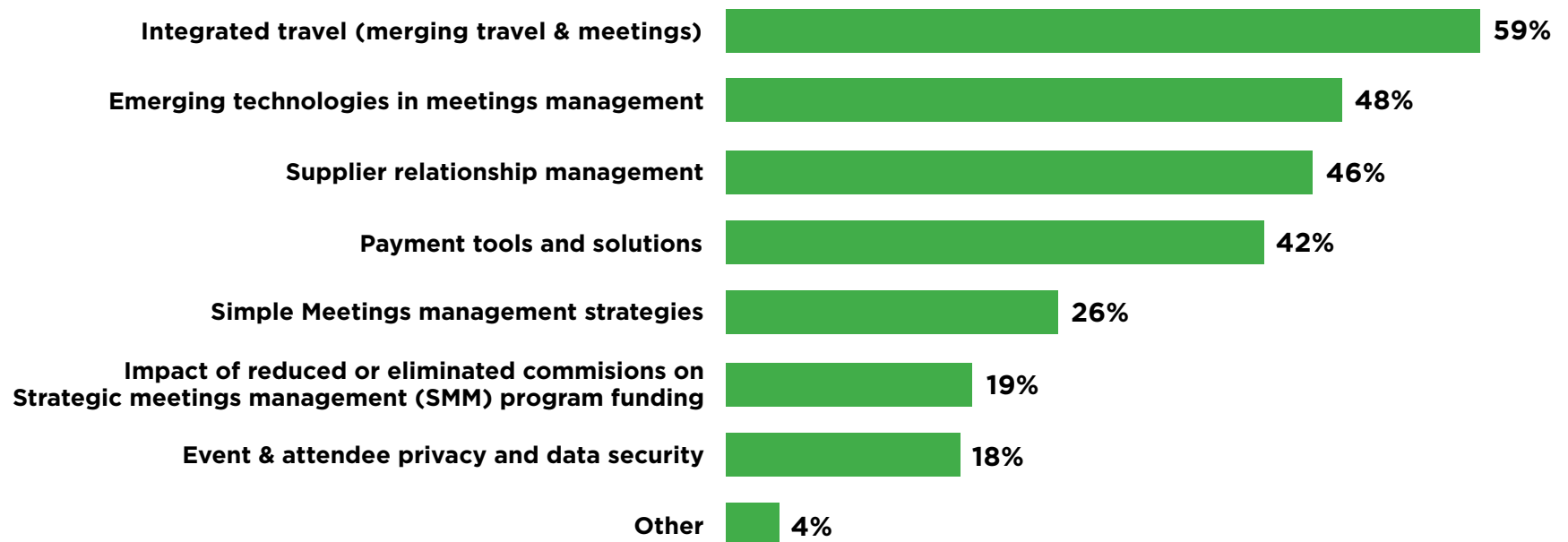
- ✓ Visibility to the number of meetings (registering meetings)
- ✓ Streamlining the process
- ✓ Adherence to compliance needs spend management
- ✓ Ease of use
- ✓ Risk management
- ✓ Duty of care
- ✓ Market coverage
- ✓ Venue inventory (number and types)
- ✓ Registration
- ✓ Room block management
- ✓ Group air or OBT (online booking tool) integration
- ✓ Reporting and business intelligence
- ✓ Implementation cost, fixed costs  
(monthly fee, license, etc.) and support



## Technology

### On which of the following hot topics would you like to receive content from the GBTA Meetings Committee in 2019

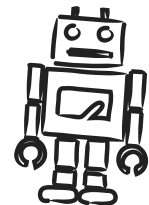
Please select up to 3 choices. (n=242)



## Technology

### **Questions to ask when reviewing event planning technology:**

- ☐ Can I get a free trial of the platform?
- ☐ Are there fees or add-ons? If so, what is not included in the base price?
- ☐ Do I have to sign a multi-year contract?
- ☐ What is your policy should I want to stop using your product?
- ☐ Are there additional fees to end my contract?
- ☐ How are you different than the competition?
- ☐ What are the weak points in your software compared to the competition?
- ☐ How will the customer relationship be managed?
- ☐ Will I be able to self-learn the software using tutorials and step by step guides?
- ☐ Will I have access to a dedicated customer support manager?
- ☐ What methods can I use to contact support?
- ☐ Does your company offer user training so I can get the most out of the platform? If so, is there an extra cost?
- ☐ Do you provide a structured onboarding plan for new users?
- ☐ What is offered for reporting and business intelligence.
- ☐ What is the total cost including implementation fees and support.



# 17. Virtual Meetings & Events

*(Excerpt by Debi Scholar from GBTA eBook)*

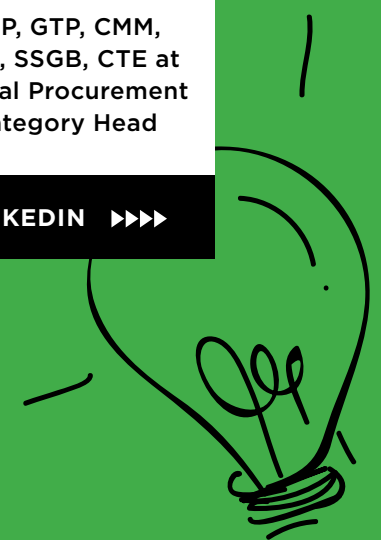
Virtual meetings and events, a critical component to a Strategic Meetings Management strategy and program, provide an organization with expanded options to communicate and broaden a meeting planner's toolbox of viable delivery solutions. By definition, a virtual meeting provides for live or archived communications, education, and gatherings among small to large, local to global attendees connected through digital technology(s) to accomplish a common goal. There are no limitations on virtual meeting types; in fact, even an incentive meeting may include a virtual gathering leading up to an in-person meeting.

The benefits of using virtual technologies for meetings include scalability, work/life balance, access to experts, replay opportunities, immediacy and reach to broad audiences, multi-lingual capabilities, carbon emission reduction and cost avoidance, and return on engagement and investment metrics.



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GLP, GTP, CMM,  
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Global Procurement  
Category Head

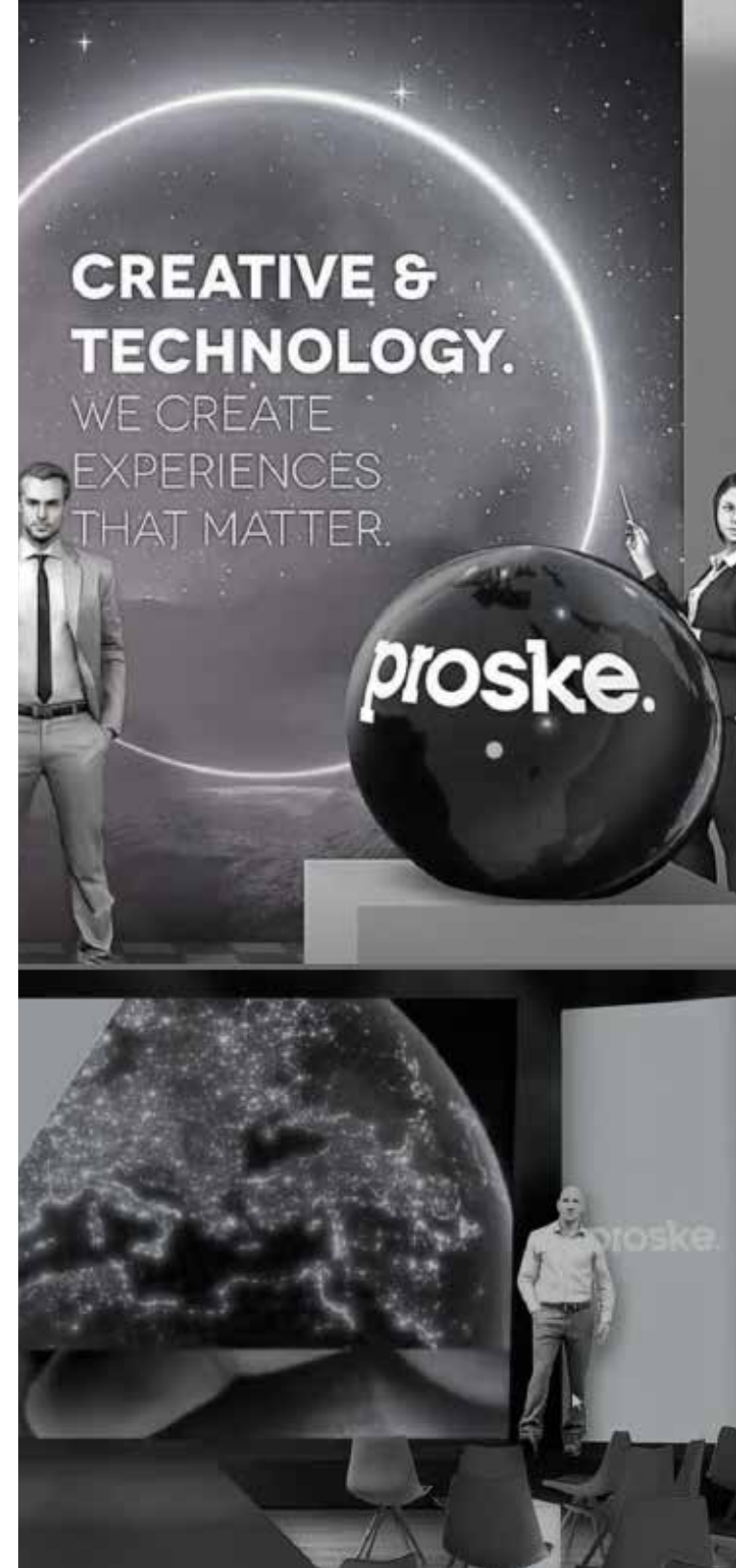
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## Technology

Content engagement is best designed by either an expert in adult learning, e.g. an instructional designer, or a virtual meeting storyboard expert who can create the best experience for the participants. Hybrid meeting success is often measured by keeping attendees engaged by the use of an emcee so that the remote attendees have the same experience as the in-person attendees. **For hybrid or all-virtual meetings, this can be accomplished by the use of:**

- Highly engaging, great speakers that vary intonation.
- Question and answers via surveys or polling.
- Videos that pertain to the content of the meeting.
- Application sharing and demos of product or service.
- Virtual break-out rooms that reconvene with each team sharing the outcome of the break-out.
- Whiteboard exercises and annotations among participants.
- Gamification, including participant voting for escalating topics during meeting.

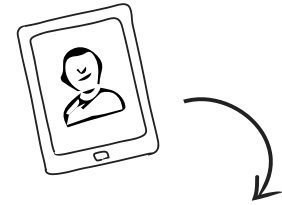


## Technology

### **Expected virtual meeting outcomes and Key Performance Indicators (KPIs) to maximize efficiency and value include:**

- Increased number of touchpoints with participants.
- Knowledge improvement.
- Level of success of meeting.
- Cost avoidance and carbon emissions reductions.

Three tiers of virtual meetings, categorized by complexity, return on investment and engagement, content storyboarding, and support required, offer a framework for designing the right delivery configurations, preferred suppliers, and a rate card “buffet” for stakeholders to choose from based on their requirements and budget. Each tier may include multiple live, on-demand, and simulcast

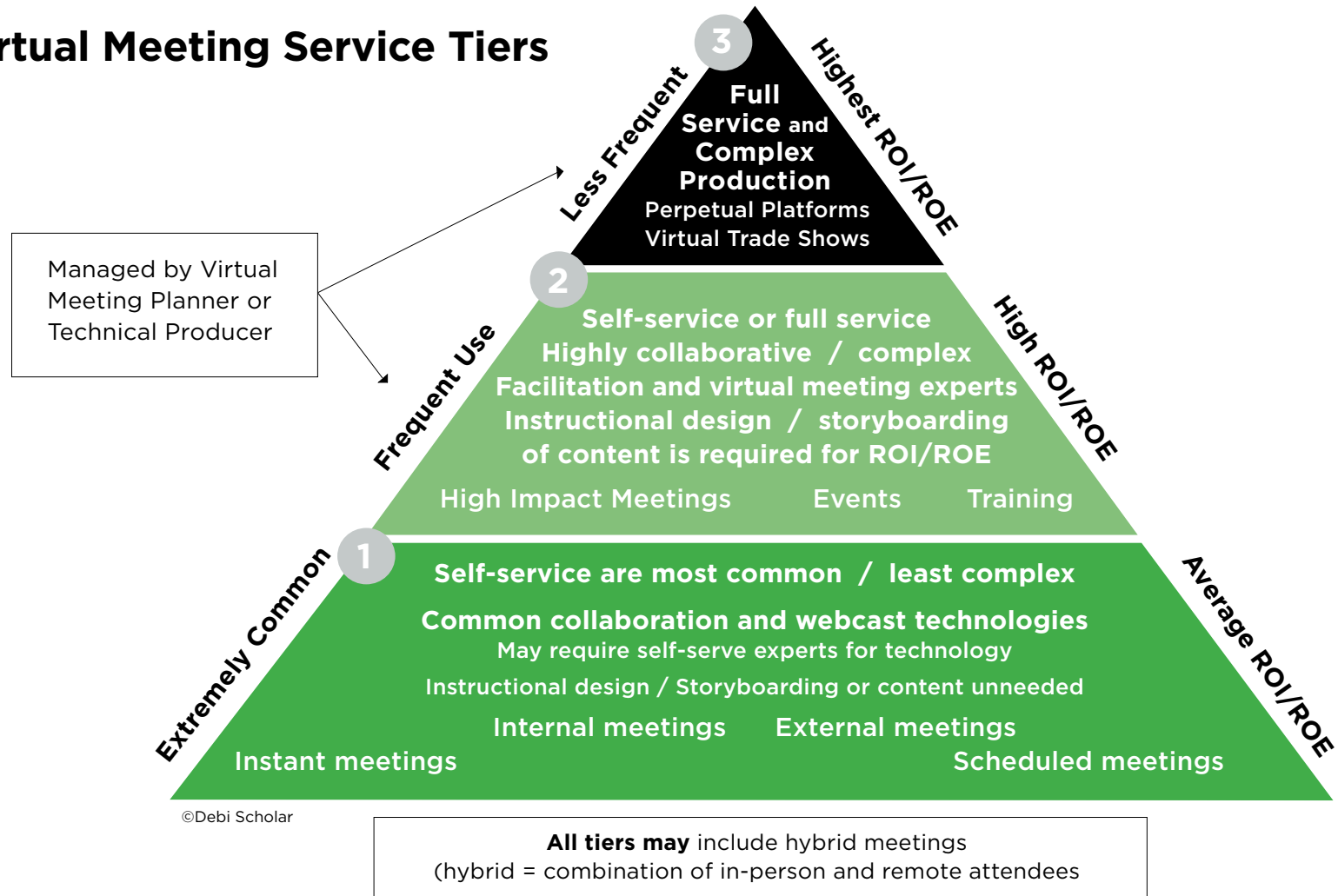


configuration options that can all be priced in-advance with a consistent pricing methodology and rates for the duration of a supplier’s contract, i.e., 3 years, globally, regionally, or locally. As such, the service fits into the Strategic Meetings Management solution as another option for planners to offer their meeting stakeholders and can be sourced every three years through Procurement.

Virtual meetings have emerged into our day-to-day business and personal routines. Use the right supplier, in the right virtual meeting tier, for the right use case, at the right price in your Strategic Meetings Management program and your organization will experience a highly valued delivery solution that complements the in-person meetings.



### Virtual Meeting Service Tiers



# Next Steps

## Next Steps

### **18. How to Prepare for the Changed World**

These are unprecedented times, and we can expect some sea-change impacts on business, behaviors, and expectations. Everyone will be required to respond and modify their business models for the new post-crisis ecosystem. How we plan, how we communicate and collaborate, and how we interact is all going to change.

Those who are quick to adjust will lead the way for the industry to follow. While so many may be taking things day-by-day, it's critical to look to the future to determine the best course of action moving forward.

**Learn more about the new normal and how to prepare for the changes in travel, meetings, and events worldwide.**

**Visit [Groupize.com Resources](#) page to view Webinars, schedule a live demo, and sign up for a free trial.**





**The end to end platform for  
corporations to manage their business  
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