

# Designing a Strategic Meeting Management Program

Helping clients gain visibility into their meeting activity



## About the Client

Our client is a global leading manufacturer of commercial trucks, buses, defense vehicles and engines.

## The Challenge

Our client recognized the value in implementing a full Strategic Meeting Management (SMM) program and chose Creative Group to support the initiative. Like many companies, key stakeholders had some visibility into overall global meeting spend, but the picture was incomplete. A greater understanding of meeting data, including overall volume, costs, and ROI was desired.

The goals were:

- To identify and consolidate all meeting activity and data
- To ensure scalability
- To identify enterprise-wide spend
- To devise internal policies and controls
- To improve risk management related to contracting
- To outline a single global meeting strategy for the company

Our role in solving these business challenges included SMM program development, sourcing, meeting planning, logistical support, group air travel and on-site management services.

## The Solution

We analyzed the current state of their program and outlined milestones that would move them to their desired state, through several phases.

### Discovery

Comprehensive discovery took place to isolate goals and objectives, determine where work was being duplicated and where the company was most at risk. We conducted an audit of meeting activity (with an estimated % increase for unknown spend), and reviewed their meeting registration technology. As a critical step in successful change management, functional experts and department stakeholders were identified, and their input was woven into the overall strategy. Our teams worked closely together to ensure smooth communications during the onboarding and continued execution phases.

### Design

With a better understanding of meeting activity and spend, we created an enterprise-wide system of policies, processes, and tools to align all meeting stakeholders with the corporate initiative. A specific meeting and registration policy was created. Forms and templates were designed to streamline the new processes and facilitate training. This included an event request form, event estimator calculator, change order, full event management scope of work and a contract approval form.

## Deploy

A client advocacy board was activated to ensure that corporate executives and department heads were in alignment with, and could actively promote the initiative and support compliance. A communication and training protocol was established and deployed in waves to hundreds of employees, both in-person and via remote sessions. We additionally supported our client with "help desk" assistance for ongoing training needs, as new employees joined the company.

## The Outcome

After the initial relationship kicked-off, quarterly business reviews were established to review trends and share the aggregated data from pre-determined spend categories. Both the C-suite and procurement teams were pleased to have clearer visibility into meeting and event spend, which enabled greater accuracy in corporate budgeting. Through our buying power, streamlined hotel contracting processes, and continuous negotiating practices, our client realized an overall savings of 19% in the first year.



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