Meetings Management That Works

An in-depth review of Cvent’s Strategic Meetings Management solution
You’ve received buy-in to implement a strategic meetings management program (SMMP), have created your meetings policy and strategy, and are now looking to choose a meetings management software platform. As you begin the search for the right solution, you are probably asking yourself a number of questions: Which system is right for my organization? What should I focus on? Can it drive my policy? Will it be adopted by the end-users? We understand that you have a number of tough decisions to make in implementing your SMMP; choosing the right technology should not be one of them.

Technology enables SMM programs and provides meeting, travel and procurement departments with the tools necessary to achieve goals of risk mitigation, cost savings, enterprise wide visibility, and business process automation. However, to gather the data needed to achieve these goals, you need an intuitive, comprehensive, and scalable solution that will be adopted across all divisions.

Cvent provides the only comprehensive and integrated solution that is both user-friendly and robust enough for use across an entire organization. It simplifies major meeting processes, including meeting planning, budgeting, sourcing, and attendee management, and captures the data necessary for detailed analytics on meeting activities and spend across the enterprise. Through the Cvent solution, meetings departments maintain creative control, while travel and procurement departments gain increased visibility into meeting activities, risks and expenditures.

**Which system is right for my organization?**

**What should I focus on?**

**Can it drive my policy?**

**Will it be adopted by the end-users?**

---

**Plan:** Meeting Planning

Cvent’s flexible meeting planning module allows you to direct all meetings and events along your unique policy and track policy compliance throughout the meeting life-cycle. In working with Cvent’s experienced implementation team, setting up your meeting planning process is straightforward and uncomplicated.

**Source:** Supplier Network

Selecting the right meeting venue or supplier can be the single most important decision a planner makes. By utilizing Cvent’s comprehensive Supplier Network of over 200,000 meeting and event suppliers, you will provide your team with the tools your organization needs to manage your strategic sourcing program.

**Manage:** Attendee Management

Many times, the real challenge doesn’t begin until registrants enter into the process. Planners struggle to balance complicated event logistics, from registration and payment collection, to housing and travel. Cvent aids planners with robust email communication, powerful attendee management and sophisticated housing and travel tools to simplify the process and ensure adoption of the solution.

**Measure:** Reporting

Determining meeting success is seldom straightforward. Data aggregation and analytics is a time-consuming and cumbersome process. Cvent offers a robust and flexible reporting engine of both standard and custom reports to measure ROI and identify opportunities for improvement in your meetings program.

---

As you look to select a technology, keep in mind that success hinges on certain key factors. Cvent has taken a unique approach in delivering superior functionality and service to our clients by focusing on these core concepts and helping you drive the success of your SMMP.

---

**Table of Contents**

- Implementation
- Budgeting & Tracking Meeting Spend
- HCP Compliance
- Strategic Sourcing
- Attendee Management
- Adoption
- Reporting & Data Analysis
- Going Global
You’ve selected the right technology for your Strategic Meetings Management Program. Now comes the crucial part – the actual implementation. At Cvent, we take a highly consultative approach to implementation, working collaboratively with our clients to make implementation a focused and productive process. Our highly experienced implementation team encompasses industry and technology professionals with 60 years of combined experience representing diverse backgrounds in SMM, corporate travel and meetings, third party operations and other technologies. This knowledge, combined with experience from our many successful SMM implementations, allows us to leverage proven best practices whenever we embark on a new project. Quite often, clients look to us for guidance and support in establishing new SMM processes, and we offer suggestions to streamline and make the best use of technology. By using working sessions as training opportunities, we are able to consistently achieve our goal of empowering clients to master their use and understanding of Cvent.

Using a variety of tools including custom designed implementation plans, process diagrams, toolkits and step-by-step guides, our Professional Services team has created an Implementation Blueprint that guides our clients from the initial discovery phase through training and rollout. A designated Strategic Account Analyst is also introduced at the onset of the implementation. Because they are engaged throughout the entire process, a smooth continuation of service can be expected once the implementation is complete. Our methodical yet holistic approach to implementation ensures a predictable, simplified and successful experience.

Cvent’s Implementation Solution

- Professional Services team members are true consultants, offering advice and best practices throughout the course of implementation
- Implementation is divided into four phases, each with distinctive focus and deliverables
- Detailed implementation plans offer clearly-defined milestones, tasks and resource responsibilities
- Cvent’s Client Implementation Toolkit explains the implementation process and each component to be configured including real-life examples of settings and options
- Visual diagrams are created to map each process workflow prior to system configuration
- Detailed Configuration Notes provide documentation of everything configured for future reference and system maintenance
- Regularly scheduled Implementation calls are conducted via WebEx; they are interactive with a built-in training component and are recorded for reference
- Step-by-step guides customized to a client’s process outline key steps required of users, ensuring effective training and adoption
- Topical or modular online training is provided with recorded sessions for future use
- Cvent Strategic Account Analyst is engaged throughout the entire implementation to ensure continuity and smooth transition of knowledge when implementation is complete

Common Implementation Challenges

- Unclear project requirements and resource expectations
- Takes longer than expected, and the project creeps in scope
- Not managed in a proactive manner
- Not enough testing is done during the process, resulting in more changes needed down the road
- Limited training resources available
- Hard to understand or follow the overall process and progress; communication and terminology gaps
- There’s nothing concrete to show for the effort

“This was by far the best implementation and follow up I have ever seen – and I’ve been in the business for many years!”

—Travel Manager, Fortune 500 Financial Company
It’s no secret that meeting and event budgeting and spend tracking has long been a pain point among planners and procurement professionals. Meeting planners will tell you that tracking budgets is one of their least favorite planning tasks, while procurement professionals recognize meeting spend as one of the most difficult categories to wrap their arms around. There are many reasons for this, including laborious data entry, time-consuming formula building in Excel, and difficulty manipulating data stored across multiple locations. At Cvent, we believe that an effective budgeting process equals actionable meeting spend and savings reporting, and it begins with a better tool – Cvent’s budget module.

Cvent’s budgeting solution allows companies to customize the data collection process to suit their own unique needs. Using Cvent’s budget templates, efficiencies are gained by reducing manual input of common or routine budget entries. Timesavers such as bulk editing of budget items, automated population of awarded RFP costs into event budgets, and budget upload functionality have all been designed to improve the planner’s experience. Savings calculations and cost variances can be configured upon implementation so that the system automatically and consistently does the math on scenarios such as estimated versus actual costs, or first offer versus contracted costs, thereby eliminating the worry of formula errors for good.

Key Features
- Seamless integration of budget to all modules
- Unlimited budget templates
- Painless bulk editing
- Detailed reporting
- International currencies and conversion rates
- Configurable budget elements

Cvent ensures the accurate collection of budgetary information resulting in actionable reporting to demonstrate the ROI of your meetings and track savings.

Commodity Spend
- 80% Custom Accommodation
- 14% Custom Creative Elements & Design
- 8% Custom Site Inspection
- 2% All Others

Spend by Chain
- 60% DoubleTree by Hilton
- 32% Comfort Inn
- 8% Hawthorn Inn & Suites

Cvent’s Approach to: Budgeting & Tracking Meeting Spend
Cvent’s Approach to: Comprehensive HCP Compliance

The Facts

- Drug and medical device manufacturers will be required to report HCP spend information in a specific format to the government on March 31, 2013, with the reporting timeframe retroactive to January 1, 2012.
- Companies who do not provide this information will be fined up to $10,000 for each failure to report, not to exceed $150,000 annually.
- For each knowing failure to report, fines of up to $100,000 will be applied, not to exceed $1,000,000 annually.


At Cvent, we understand these challenges and have taken a unique approach to HCP spend compliance to ensure that tracking and reporting are efficient and user-friendly for our clients. Cvent’s Strategic Meetings Management solution enables not only comprehensive management of the planning process, but also generates the detailed and summary level reporting necessary from a compliance perspective.

- Generate a report in one click that includes all fields necessary for the federal regulatory reporting requirements
- Integrate sessions and budget items to automate the calculation or spend per participant based on actual session attendance
- Configure custom fields to track state license information, federal identifiers, client reporting identifiers, area of expertise, product, or any other relevant data about an individual HCP

Cvent’s unique approach to healthcare compliance represents a great step towards the data visibility needs of our clients. They have provided robust configurability options that not only work for healthcare, but for other verticals with compliance concerns, and have kept the process user-friendly.

–Technology Director, Meeting Planning Organization

Key Features

- Calculate spend per HCP in one click
- Allocate budget items to appropriate business units
- Custom contact fields for all HCP information, including NPI number look-up

Cvent takes a unique approach to HCP compliance by offering clients a user-friendly solution with detailed reporting and configurability in order to meet a wide range of needs.

All life sciences companies are faced with the daunting task of tracking healthcare provider (HCP) spend for federal, state, and corporate regulations.

For most companies, the data is currently housed in multiple silos making it very difficult to get an accurate aggregation of all necessary information. Additionally, constantly changing interpretations of regulatory measures make it necessary for companies to quickly adapt to new industry standards.

HCP Budget Allocation Reports

- Create unlimited budget allocation categories and subcategories to classify spend by operating companies, departments, or lines of business as appropriate
- Generate compliance reports for state, corporate, or other regulatory requirements based on your specific needs

<table>
<thead>
<tr>
<th>HCP</th>
<th>Items</th>
<th>Currency</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment/Gifts</td>
<td>6</td>
<td>USD</td>
<td>33,987.50</td>
</tr>
<tr>
<td>Honoraria</td>
<td>4</td>
<td>USD</td>
<td>23,700.00</td>
</tr>
<tr>
<td>Meals</td>
<td>9</td>
<td>USD</td>
<td>75,647.50</td>
</tr>
<tr>
<td>Travel</td>
<td>0</td>
<td>USD</td>
<td>109,975.00</td>
</tr>
</tbody>
</table>

Cvent’s unique approach to healthcare compliance represents a great step towards the data visibility needs of our clients. They have provided robust configurability options that not only work for healthcare, but for other verticals with compliance concerns, and have kept the process user-friendly.

–Technology Director, Meeting Planning Organization

Cvent’s Approach to: Strategic Sourcing

Meeting planners and procurement professionals within the meetings industry today historically approach strategic sourcing from different perspectives.

Meeting planners are used to, and want to maintain, creative control over the sourcing process for their meetings and events. They have long-standing relationships with vendors and a good feel for the “intangibles” that make a supplier the right fit for their meeting. Procurement, on the other hand, sees meetings as a category of unmanaged spend that needs to be optimized. They see huge opportunity in meeting and event spend as an area to quickly achieve cost savings by implementing standard procurement practices to the sourcing of events and meetings.

Cvent’s Supplier Network helps corporations bridge this gap between meeting planners and procurement by providing a central platform for both parties to accomplish their goals. Cvent’s solution allows procurement to implement their guidelines and standard procedures while allowing meeting planners to remain part of the sourcing process and maintain their industry relationships. The solution tracks all sent RFPs and awarded business to provide procurement with visibility into sourcing activity and to help leverage negotiating power with suppliers in the future.

Key Features

- Over 200,000 venue profiles in the database
- Track and highlight cancelled space
- NSO and GSO connectivity
- Track preferred vendors
- Store negotiated rates
- In-depth reporting
- Integrated with other Cvent modules

Cvent’s Supplier Network helps companies implement a strategic sourcing program for meeting venues and suppliers.

- Track total meeting volume at the property, chain, or brand level to leverage total business during negotiations and reduce costs
- Promote use of preferred vendors by highlighting them in venue searches or biasing the results to display preferred venues at the top of search results
- Reduce legal involvement and time spent in contract negotiations by attaching standard Terms and Conditions to all RFPs automatically
- Eliminate favoritism in the event sourcing process by sending an RFP to multiple suppliers at once and tracking all responses in an auditable system
- Copy or send RFPs directly to your National Sales Office (NSO) and other personal venue contacts in order to maintain relationships
- Compare bid details side-by-side to expedite the vendor selection process
- Reduce manual errors by populating budget information directly from an awarded RFP into an event’s budget

Cvent Supplier Network search results for hotels in San Francisco
Attendee Management

Many times, the real challenge doesn’t begin until registrants enter into the process. Planners struggle to balance event logistics, ranging from registration and payment collection to housing and travel management. Online event management and online registration solutions are nothing new, and there are thousands of systems that can claim to offer a system for event planners. However, many of these systems are limited in their functionality, user-friendliness, and/or customer service, making them ineffective for most organizations.

Cvent provides a complete attendee management solution to help planners with any type of event or meeting.

- Intuitive and flexible registration site building process allows for usage across all types of meetings and events
- Personalize and automate your communications with attendees through a sophisticated email communication platform
- Maintain corporate brand standards with customizable registration site templates
- Encourage adoption of corporate travel tools for groups and meeting through a two-way integration with online booking tools such as like Concur Travel and GetThere
- Retrieve PNR data directly from any GDS system to ensure real time attendee arrival and departure information
- Comprehensive database to track attendee information, activity, and history
- Create websites in multiple languages and process payments in multiple currencies, allowing registrants to interact in their native language and currency
- Integrate with corporate ERP and database systems to streamline data transfer and reporting

Key Features

- Registration templates
- Robust eMarketing
- Integration with all major GDSs
- Integrations with OBTs
- User-friendly interface

With Cvent, you have a complete solution to manage any kind of meeting, including internal meetings and marketing events, small meetings, customer events, or anything else.
You’ve written your meetings policy and implemented a meetings technology system, but most of your planners are still not using it and your Strategic Meetings Management (SMM) program is falling flat.

This is a common problem experienced by many organizations as they try to launch, or attempt to grow, their SMM program. While implementation and policy are important, the success of a SMM program rests on adoption. Without buy-in from key stakeholders and in-depth training of your buyers and planners from the onset, your meetings program may not reach its full potential.

At Cvent, we understand that adoption is the key to success with your meetings program. Our implementation team works hand-in-hand with our clients to develop a detailed implementation and adoption plan that assists with the training and support of all users. This starts with having an easy-to-use toolset that has the flexibility to meet a variety of needs as well as the data reporting to analyze the success of your program. It continues with the support of specialized teams to both train and support your planners, as well as your suppliers. We work with our clients to ensure that all trainings and communications support an effective roll-out plan that will detail the value of the SMM program to ensure buy-in from key stakeholders from the onset.*

*See “Implementation” (page 4) for more information on our implementation process.

Cvent consults with clients on effective training and communication plans to ensure adoption of the Cvent technology solution and the success of your SMM program.

- Offer consultation on adoption best practices during the implementation process
- Provide a solution to meet each client’s unique needs by configuring your account to your specific meetings program and current processes
- Consult on communication plans based on a client’s needs to share information about new meeting processes with the entire organization
- Develop a transition strategy for clients switching to Cvent from another technology platform to ensure all users get up to speed quickly and easily
- Design a training strategy tailored to various user groups that ensures user proficiency
- Utilize our supplier response and product adoption teams to ensure all your planners and suppliers understand the new processes and the Cvent system
- Develop event and budget templates for planners to ensure ease-of-use, accurate data collection, and use of corporate branding standards across all meetings and events
- Simplify your planners’ jobs by automatically populating data along the lifecycle of a meeting to reduce duplication of effort
- Provide multiple levels of customer support for all clients, including both a Relationship Manager and unlimited email and phone support

“We were looking for a company that stood by their product 100%, and would be able to add value by bringing industry best-practices along with intimate knowledge of their system. Cvent definitely met that requirement.”

– Procurement Manager, Health Care Company

Key Benefits

- 4 levels of award-winning customer care:
  - Strategic Account Analyst
  - Supplier Response Team
  - Product Adoption Team
  - Unlimited phone/email support

- Client-tailored training strategies
- Consultation on roll-out plans
Cvent’s Approach to: SMM Reporting & Data Analysis

It doesn’t matter how good of a meetings policy and Strategic Meetings Management (SMM) program you have in place, if you can’t report on it, you can’t demonstrate value or program effectiveness.

Reporting and data analysis on meetings and events has historically been a very cumbersome task. For most companies, data is spread across different locations – ERP systems, Excel, in your suppliers’ databases, and in planners files, making it hard to pull all of this information together. For organizations with some kind of system in place, often times all you can get is a “data dump” of information. The analysis is then up to you, and it can take hours upon hours to sift through, build formulas and develop usable information.

Cvent’s meetings technology solution provides you with useful data and analytical reports, all included as standard within the system. All meeting and event information is stored within a central repository where you can access clean, usable information that’s easy to share with stakeholders across the organization. Our robust system allows you to analyze your meetings, create custom reports on the fly, and drill into data that has been collected during any stage of the meeting life-cycle.

Cvent simplifies data analysis and reporting through standard and custom reports to help you demonstrate the value of your SMM program.

- Measure the success of your meetings program at-a-glance using Cvent’s SMM Dashboard or through more comprehensive reporting such as spending and savings analysis, meeting activity, turn-around time and audit history reports
- Access over 225 standard reports and build unlimited custom reports as required to meet your needs
- Maintain a central repository for all meeting and event data to quickly access and generate real-time reports
- Utilize Cvent’s robust reporting engine to run pre-formatted reports which reduce user errors and maintain data integrity
- Share reporting information with anyone in the organization, including non-users, in a secure format using Cvent’s Parked Reports portal
- Use advanced filters to quickly narrow your data set and view specific information at an organizational level, or drill into specific regions, divisions, types of events, or other filters
- Set standard corporate fields and terminology at the account level to ensure the consistent collection of clean data
- Export reports into a variety of formats such as Excel, CSV, Acrobat, HTML, and Word

Key Features
- 225+ configurable reports
- Unlimited custom and ad-hoc reporting
- Export data into multiple formats
- Standard budget and SMM dashboard reports
- Printer-friendly formats for all reports

“We saw that Cvent was a step ahead of the competition and felt more confident going with them.”

– Director, Travel and Meetings, Fortune 500 Health Care Company
Cvent’s Approach to: Going Global

The meetings industry has recently been hearing a lot of buzz about going global, whether it be from a multi-national corporation or an association expanding its reach to world-wide markets.

Recent global events have shown us just how interconnected we are, and have impacted both the meetings industry and organizations who hold meetings and events around the world.

For years, organizations have contemplated going global with their Strategic Meetings Management Programs (SMMPs).

Cvent’s meetings technology solution allows for maximum flexibility across departments, countries, and regions to standardize meetings and events in one system.

- Automate diverse meeting processes across the meeting life-cycle to account for regional or country based policies
- Set a default account currency to consistently role up financial data while allowing users to work in their own local currency for RFPs, attendee registration sites, and event budgets, thereby increasing global adoption of the solution and your program
- Build registration sites in multiple languages to allow meeting attendees to receive communications and register in their native languages to increase online registration
- Retrieve air travel booking information and updates from any GDS to capture attendee travel details, regardless of the booking system used or country of origin
- Search suppliers based on regional criteria such as country, area, postal codes, metric room sizes, and more through the Cvent Supplier Network
- Run reports on meeting activities and counts as well as spend by country or region to provide detailed analysis and analytics on your global meeting program
- Utilize Cvent’s award-winning customer support team 24/7 for global user support

Key Features
- Multi-currency event budgets
- Multi-language event websites
- World’s largest database of global meeting suppliers
- 24/7 unlimited customer support
- Cross-country reporting and analysis

Cvent Supplier Network search results for hotels in Germany