Success in Meeting Planning

Future Plans on the Journey of SMM

After the successful implementation of their meeting request process, MetLife is currently focused on increasing adoption of the Cvent sourcing module. They are also examining the possibility of taking their meetings management program global.

Client Profile

MetLife is a leading global insurance and financial services provider. It operates under a centralized meetings department with 500-600 meetings registered annually. At the time of transitioning to Cvent, MetLife had used a different meetings management technology solution for a number of years.

Challenges

MetLife came to Cvent toward the end of its contract with a different meetings management technology system. Users found the existing solution cumbersome and were interested in finding a more user-friendly solution to increase adoption and therefore the value of their meetings program. In evaluating different solutions, MetLife decided on Cvent as the best solution to meet their complex meeting planning requirements while also being user-friendly.

Once Cvent was chosen as the new technology provider, MetLife faced a number of challenges in successfully transitioning solutions. The fear of starting over with a brand new system was compounded by the short time frame for transition. The client had only 10 weeks, inclusive of two major holidays, to implement, train, and adopt the Cvent system. In addition to the transition challenges, the client required a piece of functionality that Cvent did not offer at the time of contract signature.

The Cvent Solution

To address these challenges, Cvent’s Implementation Team began working with the MetLife team prior to contract signature. While final contract terms were approved by MetLife’s legal team, Cvent provided the meetings team with “homework” to help the team prepare for an immediate project kick-off as soon as the contract was received.

Once the contract was signed, Cvent’s Implementation Team provided MetLife with a detailed Implementation Plan and Toolkit which outlined and defined all project tasks, deliverables, and milestones. This documentation provided the client with a clear understanding of the implementation process and helped to ease their concerns about transitioning to a new technology solution.

Once implementation officially kicked off, the Cvent and MetLife teams schedule twice weekly calls to make sure the project was completed within the necessary time frame. Cvent helped the Client streamline its processes and increased user friendliness by consolidating their Meeting Request Forms (MRF) to just one by using advanced logic and sub-questions within the form.

Cvent also worked with the client to create a Requester Website, a portal that houses the Meeting Request Form, with a central meetings calendar, and other meeting related policies and information. The site easily accessed by all Requesters, and the MetLife’s Cvent System Administrator maintains it without the delays and costs associated with updating the company’s intranet site.

Finally, to assist MetLife with their roll-out communications strategy, Cvent provided a Communication Plan template that MetLife customized to its specific needs. Cvent created a customized training plan focused on bridging the gap between the old and new systems. The Cvent team had experience with the client’s old system and was able to refer to terminology already familiar to users from their old system.

Cvent’s technology team added the required functionality to the product and the client’s transition was successfully completed within the 10 week deadline.

3 Key Take-aways

1. Start implementation “homework” prior to contract signature to expedite process.
2. Adhere to Cvent Implementation Plan milestones to roll out on time.
3. Create customized training plans and communication templates to increase adoption.

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