Managing Executive Expectations

Allegis Group is an international staffing and services company consisting of eight operating companies. Working directly with presidents and CFO’s of these organizations, the meetings team has a unique responsibility to provide insights into meeting spend, budgetary compliance, and overall event value.

The team at Allegis Group needed a way to effectively manage the meeting request process for their organization. “We’re in the Finance world, which is very unique for meeting planners,” explains Meeting Planner Melissa McGowen. “We have a lot of pressure being able to talk about our budgets and what we’re spending, being the guiders for the CFO’s and presidents. We need to be able to show them the value of our team.”
The meetings team needed to better capture all meetings, trainings, and incentive programs for increased executive visibility. Melissa notes, “We were originally using Cvent for our fee sourcing, awarding, and registration. We kept having leaders and CFO’s reach out to ask what our budget spend was. We were having to ramble through Excel documents to figure it out.” They had no way to show total spend by Operating Company, year, or any other financial lens. Melissa’s team knew they needed a technology solution to reduce their workload and meet executive expectations.

Building a Tech Stack for Financial Success

Using Cvent’s Event Management solution, they built over 300 registration sites in 2017. In addition, the team adopted new Cvent technology to capture accurate spend and provide on-demand reports. “When we attended Cvent CONNECT in 2014, we decided to adopt the Budget Module. It’s the best thing we’ve ever done,” Melissa says. Working with Cvent and a dedicated financial analyst, the team created a Meetings Dashboard. They captured budgets for all 732 events sourced, ensuring 100% accuracy in the SMM process. The dashboard effectively captured all spend by Operating Company, top ten vendors, cost savings, average room rate, and comparison to the previous year.

“It gives us the ability to present a financial dashboard to the stakeholders, as well as show year over year comparison for each program,” Melissa notes. The team was even able to catch an impressive $70,000 error because of their use of Cvent. She adds, “We saved a lot of time using the Budget Module. Every personality for every stakeholder is different. If needed, you can go right back into Cvent and pull the report. It takes five minutes, but to them, you look like a hero.”

Integrating Travel with Concur

Melissa’s team also used a Concur integration to help manage requirements for their Travel team. “Integration is a huge part of our world,” explains Melissa. “We have to make sure it all works efficiently so we can do our jobs. When we upload attendees to an event, it’s very easy that at the end, they’re able to click ‘book flights’ and get directed into Concur.” The added time savings have benefited both departments. “We have a great relationship with our Travel team by using Cvent. It makes it a very seamless process,” Melissa adds.

Showcasing Success at the Executive Level

Melissa’s team has experienced newfound success in meeting, and even exceeding, the expectations of the executive teams. “We’ve been able to have a lot of presence with the stakeholders, especially CFO’s and presidents,” Melissa notes.

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Her team’s unexpected success has helped increase her visibility within the organization. She explains, “Being in my role, never did I think I’d be sitting in a room with the CFO. I’m able to show him what I’ve created with the financial dashboard and what else I want to bring to the table.”

This success has also expanded her team’s role in the organization. As Cvent experts, they have become a financial lynchpin for ensuring fiscal clarity and budgetary compliance in the meetings and events space. “Ever since we created the financial dashboard for the stakeholders, they definitely want to keep seeing more and more,” she says. “We’ve had a lot of support from Cvent, being able to create what we need to meet the expectations of the CFO’s.”

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