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Meetings Program

Communication Plan

**General Information**

A successful project roll-out begins with effective communications. This boilerplate document represents an example of a typical meetings management technology roll-out communication plan. The actual communications, frequency, and target audiences should be evaluated based on the specific needs of the organization, modeling other successful project roll-outs, and taking into consideration the organization’s corporate culture.

To gain buy-in and promote support from internal and external stakeholders, it is important to communicate project benefits, objectives, milestones, and critical success factors. While some communications occur only at the project onset, others are ongoing. The table below illustrates some of the communications you may want to include in your campaign.

For help with other aspects of your meetings management program, be sure to access [Cvent’s Meetings Management Starter Kit](http://www.cvent.com/en/strategic-meetings-management/building-business-case-thank-you.shtml?cid=701o0000000dJzvAAE).

**About Cvent**

Cvent, Inc. (www.cvent.com) is the industry leading developer of on-demand event management software and strategic meetings management solutions. Founded in 1999, Cvent is a 1,700+ person, growing and profitable software company headquartered in Tyson’s Corner, VA. Cvent offers web-based software with features including: online event registration, event management and marketing, event website creation, meeting site selection, event sourcing, mobile applications, and web surveys.

Cvent offers comprehensive workflow automation to help companies streamline meeting planning processes, enforce policies, and share best practices specific to the needs of the business, all in real- time. This flexibility makes it possible for customers to automate even the most complex processes. System policies can even ensure that every meeting planned follows corporate guidelines and established business rules, regardless of who is requesting or planning the meeting.

Finally, Cvent provides data consolidation and a centralized view of meeting activity. Yet, it supports decentralized meeting management by offering access and visibility settings to segment data for specific individuals or groups of users. This benefits companies wanting to capitalize on data centralization but prefer meetings to be planned by autonomous individuals, departments or divisions.

**Project Communication Table**

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| **Message** | **Purpose** | **Target Audience** | **From** | **Type, Timing & Frequency** | **Distribution Date** |
| Project Introduction – Sr. Management Level | To introduce the initiative to Sr. Managers and solicit support. | Executive sponsors and/or project steering committee, company or division controllers | COMPANY Project Lead, Meetings Council, and/or Executive Sponsor | Type: Email, Timing: 4 weeks pre roll-out,Frequency: Once |  |
| Indirect Stakeholder Announcement | To explain the value of meeting technology in terms which resonate with various stakeholder groups. | Procurement, Travel, Finance, and IT Departments, internal meeting “customers”  | COMPANY Project Lead | Type: AnnouncementTiming: Prior to project roll-outFrequency: Ongoing on as needed basis  |  |
|  Project Announcement | To introduce the initiative and provide any necessary instructions. | ~~General Population~~All employees and contractors impacted by new initiative | COMPANY Project Lead, Meetings Council, and/or Executive Sponsor | Type: Email, Timing: 3 weeks pre roll-outFrequency: Once |  |
| Partner Announcement | To explain the reasoning and benefits behind any process changes or new responsibilities for suppliers. | MMC’s, TMC’s or any other key suppliers involved in the new process | COMPANY Project Lead | Type: AnnouncementTiming: Once at project roll-out Frequency: Ongoing on as needed basis for updates |  |
| Property/NSO Announcement | To explain the reasoning and benefits behind any process changes or new responsibilities for NSOs such as how to respond to RFPs. | Preferred hotels, NSOs | COMPANY Project Lead | Type: AnnouncementTiming: Once at project roll-out Frequency: Ongoing on as needed basis for updates |  |
| Roll-out Today | Reminder of new process or policy –effective today. | All employees and contractors | COMPANY Project Lead, Meetings Council, and/or Executive Sponsor | Type: EmailTiming: On go-live dateFrequency: Once |  |
| Direct Stakeholder / Professional Planner Announcement | To explain the value of meeting technology for meeting professionals, encourage training. | Meeting planners, non-professional planners | COMPANY Project Lead | Type: AnnouncementTiming: Once, prior to trainingFrequency: On a regular basis to provide updates (monthly or quarterly) |  |
| Post-Launch Reminder | Reminder of new process or policy. | General PopulationAll employees and contractors | COMPANY Project Lead, Meetings Council, and/or Executive Sponsor | Type: EmailTiming: 30, 60, 90 days after the go-live dateFrequency: Reoccurring |  |
| Project Training or Introduction Deck | To educate users or other affected stakeholders on new technology, policies and processes. | Varied, could be targeted to users only or to any stakeholders | COMPANY Project Lead and/or designated trainer | Type: PPTTiming: Used during training sessions (lunch & learns, etc.) could be hosted on company Intranet Frequency: Ongoing |  |
| Project Related FAQ’s | To answer questions, offer more detailed information on the technology, policies and processes. | All employees | N/A | Type: MS Word or HTML (web site)Timing: Could be emailed or hosted on Meetings Intranet Frequency: Ongoing |  |

**Sample Communications**

## **Strategic Management for Meetings & Events**

Cvent automates the meeting planning process, enforces procurement policies, contract review and best practices. Additionally, Cvent consolidates meeting data and drives corporate decision making through meeting data analytics. Using an enterprise meeting management system, companies can put a control system in place to establish a more standardized meeting planning process and gain visibility into meeting activities across their entire organization.

## **Why Use a Specialized System for Meetings & Events?**

General spend management solutions provide e-procurement, policy and contract enforcement, and spend analytics by vendor or by cost category. To maximize savings on meetings and events, however, companies need a technology solution that addresses the needs of the entire lifecycle of a meeting or event This process requires the integration of traditional spend management capabilities with specialized modules including attendee management, budgeting, and sourcing best practices specific to the meetings industry, and analytics that consolidate data from multiple vendors, cost categories and across multiple events. Using an enterprise meeting management solution, such as Cvent, companies can gain visibility and control over this often-overlooked expense and realize savings of 10-20% on total meetings and events expenditures.

## **Project Announcement – Senior Level**

On date, COMPANY will launch Cvent/Company Branded Product Name, a new website and technology tool designed to help employees who request, plan, manage or even just attend meetings. This system has been implemented to support the new COMPANY Meetings & Events Policy, taking effect on date. COMPANY is introducing a new process for requesting and registering meetings by making use of this web-based application called Cvent. Using Cvent, COMPANY will now be able to:

* Automate the meeting request and approval process
* Post meetings to centralized and divisional meeting calendars
* Source venues electronically and negotiate costs efficiently leveraging centralized bid history
* Create branded meeting websites and email communications that are compliant with regulations such as: GDPR & CCPA
* Manage attendee logistics of COMPANY events

As a [company, divisional, departmental] leader, we are reaching out to you today with information about how this new company-wide initiative will benefit you and to ask for your support as we roll out this important initiative. Using an enterprise meeting management solution, we plan to gain visibility and control over our meeting expenses and realize savings of 10-20% on total meetings and events expenditures. To reach this goal, this initiative will:

* Reduce risks and liabilities by providing greater control over meeting procurement practices, contract review and management
* Generate enterprise-level spend management reporting to leverage in key supplier negotiations
* Automate and improve processes which will result in cost savings from staff redeployment and reduced outsourcing
* Optimize the use of preferred suppliers and rebooking of cancelled space
* Integrate attendee registration with our online travel booking system to streamline processes and increase adoption of online solutions

In the coming weeks, you will be hearing more about our implementation and roll-out of the Cvent meeting management system. In the meantime, if you have any questions please contact Cvent/Company Branded Product Name@COMPANY.com and you will be contacted by a representative of COMPANY's Meetings Council. Thank you in advance for your support.

Regards,

Program Lead and/or Executive Sponsor

## **Project Announcement – General Population**

On date, COMPANY will launch Cvent/Company Branded Product Name, a new meetings management tool designed to help employees who request, plan, manage or even just attend meetings. This system has been implemented to support the new COMPANY Meetings & Events Policy, taking effect on date. COMPANY is introducing a new process for requesting and registering meetings by making use of this web-based application called Cvent. COMPANY will now be able to:

* Automate the meeting request and approval process
* Post meetings to centralized and divisional meeting calendars
* Source venues electronically and negotiate costs efficiently leveraging centralized bid history
* Create branded meeting websites and email communications that are compliant with regulations such as: GDPR & CCPA
* Manage attendee logistics of COMPANY events

[Omit if sending to general population] You have been identified as an employee who may request or plan meetings and events or work with those who do, and as such, we are reaching out to you today with important information about how this new company-wide initiative may affect you.

Insert policy statement here….

It’s important to note that any company sponsored meeting or event in which ten or more attendees require overnight accommodations, *or* a signed contract valued at $# or more is required, *and* takes place off-site (not at a COMPANY facility)must be registered and approved in the Cvent/Company Branded Product Name system by completing a meeting request form.  This form is accessible to any employee and training is not required to submit a meeting request. Small meetings are encouraged to still be registered in the in order for the meeting to appear on the divisional or central meetings calendar.  In certain divisions, meetings over $# will be routed for additional approval to ensure the requested meeting has received all appropriate approvals before the meeting planning process begins.

If rolling out a new meetings website…

The new Cvent/Company Branded Product Name website will also provide detailed information on how to effectively plan an event including links to tips and time-savers, contract guidelines and best practices, along with information on resources like Procurement and Travel.

If internal training courses (not Cvent public sessions) are offered…

We have developed two training courses that will be available from the [Company Learning/Education or Training Dept.] on date; an Introduction course and an Advanced course. It is suggested that all employees who plan meetings take the Introduction course. Please note that successful completion of the Advanced course is mandatory to apply for a user license and to be able to use some of the advanced features of the tool. The Introduction course provides a high-level summary of the benefits of Cvent/Company Branded Product Name including how to complete the meeting request form and some basic guidelines that will help you plan events at COMPANY.  The Advanced course dives deeper into the meeting technology available that will help you manage attendees for your events, build your own custom branded COMPANY event web sites and produce helpful reports that will streamline the planning process. The tool can also be utilized to streamline your planning of internal meetings as well with the use of the attendee management and budget modules.  As you learn to use the tool's advanced features, you can custom build event web sites or simply copy a template from a previously created event. In addition to this training, Cvent - the technology vendor - provides additional learning opportunities including daily, complimentary web-based courses.

If replacing an existing system…

This new web-based technology will replace the current "name" which will be retired soon and has been designed to meet the existing and future needs of all employees who plan and attend meetings at COMPANY. Once you complete the Advanced course, Cvent/Company Branded Product Name will also allow you to view a consolidated enterprise event calendar, upload all of your necessary event information from a centralized location and develop metrics for your event. The data collected through Cvent/Company Branded Product Name will allow us to better leverage future contracts and reduce our overall meeting expenditures while providing you with useful tips and tools and ensure that all meeting contracts are within company standards.

If you have any questions please contact Cvent/Company Branded Product Name@COMPANY.com and you will be contacted by a representative of COMPANY's Meetings Council. Thank you for your support.

Regards,

Program Lead and/or Executive Sponsor

## **Roll-out Today Communication**

COMPANY is excited to launch Cvent/Company Branded Product Name,our new meeting management technology tool designed to help employees who request, plan, manage or attend meetings.  Please visit the Cvent/Company Branded Product Name[insert link] for more information including access to the new [meeting request form, meeting calendar and/or training modules].

As a reminder, any company sponsored meeting or event in which ten or more attendees require overnight accommodations, *or* a signed contract valued at $10,000 or more is required, *and* takes place off-site (not at a COMPANY facility)must be registered using the Cvent/Company Branded Product Name meeting request form. This form is accessible to any employee and training is not required to submit a meeting request.

Please note that access to the advanced features of the system requires a user license and successful completion of user training. To request a login or for any other questions, please contact Meetings@COMPANY.com and you will be contacted by a member of the Meetings Council.

Thank you.