

# **Strategic Meetings Management Program (SMMP) Implementation and Idea Guide**

**By**

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This report was commissioned by SignUp4 ([www.signup4.com](http://www.signup4.com)).

## Strategic Meetings Management Program Implementation and Idea Guide

### Index

1. [What is SMMP?](#)
2. [Why should I consider implementing SMMP?](#)
3. [SMMP pre-planning – What do I need to get started?](#)
4. [Steps to SMMP Implementation](#)
5. [Conclusions and Summary](#)
6. [References](#)

# 1. What is SMM?

[Back to Index](#)

## What is SMMP?

A strategic meetings management program (SMMP) is the strategic management of enterprise-wide meeting related processes, spend, volumes, standards and suppliers to achieve quantitative cost-savings, risk mitigation and superior service.<sup>1</sup> SMMP can help your company reduce meeting costs, reduce contractual risks and improve service.

This report will define the elements of SMMP, explore the reasons why a SMMP should be considered, and cover implementation ideas and steps.

## SMMP – A Brief History

The seeds of SMMP started in the early 1990s, when large, multi-division companies implemented “meetings consolidation” programs to centralize the meeting planning and procurement functions. The primary goal was to track and reduce meeting spend and to assist with the procurement of meeting space and hotel rooms.

In these pre-internet days, this tracking process was largely manual usually requiring embedded staff from a “meeting consolidation company” to tally meeting costs in the corporate headquarters.

Enabled by the advent of advanced web-based data management tools, meetings consolidation has evolved into the broader term “strategic meetings management.” This broader focus includes substantial costs savings of meeting spend through standardized procurement processes, risk mitigation, business process improvement, and improved client services.

## Target Audiences

The primary target for SMMP has been large corporations holding hundreds of meetings annually, with several millions of dollars of meeting spend and have many divisions or product lines. However, with the development of several SMMP technology products with a wider array of offerings, the benefits of SMMP and related procurement and attendee management products are opening to smaller companies and even associations.

## State of Adoption

The data on SMMP adoption is somewhat limited. Fifty-five percent of meeting planners in MPI’s FutureWatch 2007 survey report that they are calculating and reporting total meeting spend for the entire organization.<sup>2</sup> The 2008 Aberdeen

Strategic Management Benchmarking Study<sup>3</sup> indicates that 44% of enterprises have decentralized meetings management responsibilities shared across various departments and 26% do not have a formal organization to manage strategic meetings. According to the same study, 40% of enterprises do not involve procurement in the management of meetings and events.

With the maturation and proliferation of SMMP technologies and increased industry awareness, corporations are increasingly moving to SMMP. Additionally, regulatory laws, such as [Sarbanes-Oxley](#) requiring public corporations to have more auditable meetings processes, have spurred companies to move in this direction as well.

Today there are a variety of SMMP technology providers as the range and scope of what constitutes a strategic meetings management program continues to evolve.

### **Typical Components to SMMP**

There are many elements to a SMMP and all do not apply to every case (one size to does not fit all!). In general, SMMP should provide a formal meetings management policy extending to all departments and division of an organization.

Among the key elements usually included in SMMP are the following:

#### **1. Meeting Design:**

This involves the pre-event planning of the meeting including:

- Meeting scope specification: the purpose of the meeting, the agenda, size, and cost elements.
- A formal standardized process to propose, review and approve meetings.
- Measures to encourage compliance to the above process with enforced consequences for non-compliance.
- Budget planning tools are commonly involved with meetings design including the ability to track budgeted, actual and negotiated savings for specific meeting spend elements.

#### **2. Strategic Sourcing:**

Once the meeting is approved, the next step is sourcing. This involves choosing the meeting site(s) and negotiating the contracts for sleeping rooms, meeting space, travel and other event services. SMMP sourcing programs will include:

- A standardized procurement process for vendor services consistent throughout the company
- The establishment of preferred vendors with the promise of preferred pricing/concessions for the volume of business directed to them.
- Standardized contracts and service agreements negotiated with these preferred vendors will decrease negotiation time and contractual liability.

- Usually, key performance indicators (KPI) will be set up and tracked to measure the quality of vendor performance.
- Sourcing for hotel sleeping rooms and meeting space is one of the most common elements of SMMP to be out-sourced to a third-party sourcing company where, through volume purchasing, negotiating experience, and standardized contracts, very competitive rates can offered to the client despite commissions being charged by the agencies to the hotels.

### **3. Corporate Meetings Calendar**

Corporate-wide meetings calendars are also common with SMMP.

- They can help increase the visibility of meetings across the enterprise and help to avoid overlap of events.
- Calendars can help a company to avoid cancellation fees – if one division cannot use the meeting space, perhaps another can.
- Conference calendars tracking the location and participation of all company meetings can be useful in crisis management situations as well.

### **4. Meetings and Attendee Management**

A significant component of tracking total meeting spend is managing the attendee registration, travel and housing expenses. Automated, web-based attendee management tools will not only track these expenses, they can substantially improve staff efficiency and customer service as well. Specific components often include:

- The ability to attendee and their guest to register for a variety of program tracks, meals, outings and more.
- The ability for the attendee to arrange all travel matters online including air and ground transportation automatically funneling to preferred vendors.
- The ability for planners to create arrival and departure manifests drawing real-time data directly from the travel bookings.
- Housing management including room and hotel assignment based on attendee profiles, roommate matching and other housing requirements.
- The creation of shell PNRs (passenger name records) for agency booking of travel details.
- Full hotel and flight confirmation number tracking
- Ability for attendees to make changes to the travel records online.

When procurement principles are applied to travel arrangements through these tools, substantial savings can be accrued in addition to automating many of the management tasks and improving client service.

### **5. Reconciliation of Expenses**

When the meeting is over, the bills will need to be paid. Tracking these payments is a crucial component of SMMP. The payment process should be consistent throughout the company and in compliance with standard

procurement policies. Meeting expense cards (such as offered by Visa and American Express) can simply and streamline this process making it easier to assign specific event costs to specific budget codes.

## **6. Measure and Evaluation**

The data tallied and tracked throughout the meeting life cycle, should be easily accessible for analysis. What was the average meeting cost per person? How much is the company spending annually with a specific hotel chain across all meetings? What are the meeting cost trends from year to year? What were the negotiated saving for a specific meeting? How close are the actuals to budget? These are among the hundreds of analytic questions answered through a successful SMMP. If you do not know how much you are spending on your meetings, you are likely spending too much.

Exercise care in choosing a SMMP technology provider. The reporting tools should be easy to use, flexible and customizable for viewing in many ways such as charts, dashboards, budget analytic comparisons and others. Good business intelligence analytics are vital to a successful SMMP.

In addition to measuring meeting spend, there is a strong need to measure meeting effectiveness – or return on investment (ROI). It is not just about the money spent, it is about how much “bang for each buck” spent that counts.

This requires a systematic way to convey the specific, measureable goals and objectives from the meeting owner to all meeting stakeholders. The progress toward these goals (learning, new customers, increase sales, etc.) should be measured before, during and after the event usually by a series of carefully worded, consistent surveys. At meeting’s end, the value of this progress divided by the meeting cost will give you the ROI measurement.

Fortunately, the company-wide communication lines and discipline required for setting up a successful SMMP lend well for the two-way communication and tracking ROI data as well. More information about ROI tracking details is available through the [ROI Institute](#)

As mentioned previously, one size does not fit all. These six SMMP elements and others can be implemented individually or not at all. SMMP represents a major change in how meetings are managed in a corporation. Some companies adopt a full sweeping change while others do it a step at a time. The results of these efforts will improve your meetings and reduce their costs.

## 2. Why should I consider implementing SMMP?

[Back to Index](#)

A successful SMMP will yield multiple benefits including:

- Greater understanding of your meetings data including costs, volume, attendance and ROI.
- Better business intelligence through easy and consistent analysis of meetings data.
- Reduced duplication of effort and improved meetings consistency/quality through consolidating meeting management to meeting planning teams or outsourced vendors.
- Cost savings through standardized procurement procedures.
- Costs savings through the establishment of preferred vendors, standardized contracts, reduced negotiation time, and increased vendor concessions from the leveraged buying power from focusing the meeting spend.
- Risk avoidance through meeting centralization of contracts focusing contract reviews and signing to contract experts.
- Reduced regulatory risks and better legal compliance to regulations such a Sarbanes-Oxley (SOX) through policy guidelines and compliance tracking
- Increased efficiencies and productivity through standard operating procedures and technology automation.
- Greater meeting value and quality through ROI management and meeting consistency.

## 3. A SMMP Pre-Planning – What do I need to get started?

[Back to Index.](#)

SMMP significantly changes how meetings are procured, how they are managed and how they are evaluated in an organization.

In large corporations with multiple divisions, the full benefit will come when uniform procedures apply across the entire enterprise. Often times this will lead to centralization, or at least central oversight, of many meeting management

components and functions.

This centralization can be seen by some staff as taking away some of the “perks” of the job. An administrative assistant, for example, may resist giving up some control over his/her “pet” event. Some meeting planners see third-party sourcing companies as a threat to their jobs.

Due to the magnitude of the change, the inherent management silos in many corporations, and the resistance to change that is commonly present, it is important to secure an executive sponsor who understands the impact of SMMP and shares the vision. Ideally, this individual should be in the executive leadership level, should have enterprise-wide influence, and have the ability to allocate resources to make it happen.

### **Questions to ask before approaching senior management**

In order to make a compelling case to this executive champion, data or best estimates should be collected and analyzed. Among the questions to ask are:

- Who are the key stakeholders for meetings (meeting planners, sponsors, attendees, procurement, risk management, security to name a few)? How aware and receptive are they to an SMMP initiative? Do you have allies to begin your efforts?
- What is the estimated number of meetings that your division and company hold annually?
- What are the estimated annual meetings-related costs for hotels, travel, catering, other vendors, etc. for your division and for the entire enterprise?
- How are hotels and other meetings vendors procured across the enterprise? Is this process centralized or decentralized? Is the process consistent among divisions?
- Does your company have preferred vendors? How much business do they receive from your company annually? What discount is received based on this relationship? How much can be saved if a preferred vendor program is established?
- What are the meeting request and approval processes? Are they consistent across the enterprise? How are these procedures enforced? What are the risks and costs for lack of procedures or enforcement?
- How are meeting logistics and managed across the enterprise? Centralized or decentralized? Is the process consistent among divisions? How much could be saved if a more automated and streamlined process is in place?
- How are meeting related travel managed across the enterprise? Centralized or decentralized? Is the process consistent among divisions? How much could be saved if a more automated and streamlined process is in place? How easy is it for your attendees to arrange? How automated

- is this travel management process? What are the costs in lack of automation in both customer service and dollars?
- What level of legal risk exposure is from meetings? Does your company have standardized contracts with preferred vendors? How much time is taken negotiating contracts? What are the contractual risks from inexperienced staff negotiating contracts? How much in cancellation fees is paid each year? How much negotiating time could be saved and legal risk avoided using standardized contracts?
  - What level of regulatory liability exposure is there? Is your company SOX compliant? If not, what are the potential costs of non-compliance?
  - Are there problems for attendees, clients and exhibitors coming to your events? Can these problems be improved by using an integrated technology platform? What value should be assigned to improved customer and staff service?
  - How are meeting expenses reconciled? How much time does it take? Is this in a consistent manner? How accurate is this reconciliation? How much time and how much better data could be saved from the use of standardized and more automated reconciliation tools across the enterprise?
  - What do similar companies who have implemented SMMP report in cost savings? How much does this apply to your company?
  - What are the SMMP options available? What technology options are available? How much can these programs save over the cost of purchasing, implementing, training and supporting this technology?

### **Build the initial stakeholder team**

Many of the above questions may need help in answering. At some point early in the process, it is helpful to establish allies in this effort. These may be fellow meeting, travel or procurement managers or others involved in the process. Those working on the front line feel the pain of inefficient meetings management processes most directly may be willing to help. These allies can help you collect the data and to give a more rounded assessment of the issues and better estimates than you can do on your own. Additionally, SMMP technology providers can provide data, case studies and success stories to support your case.

### **Securing senior management support**

Armed with the data collected, it is time to make the case to senior management. This “top-down” approach using an executive champion has been the most common path to success in many SMMP programs. This executive usually has some direct or indirect responsibility for meetings, travel and/or procurement. They should understand the value of meetings to the enterprise and be willing to lead the change. They must have the leadership strength and support across the enterprise to enforce the changes.

This executive sponsor should be approached with caution. State your case succinctly, supported with facts and data, with an emphasis on results. The “executive briefing” approach is often the best. A very clear business case is imperative with a strong cost/benefit analysis.

This “executive champion” should understand the cost savings, the risk avoidance and business process improvement resulting from an SMMP. In short, they will need to share the vision and be able to influence the change throughout the organization.

Once this support is secured, it is time to move to SMMP implementation, outlined in the next chapter.

## 4. SMMP Implementation Steps

[Back to Index](#)

### Steps to SMMP Implementation

Once you receive the executive approval to proceed, the real work begins. Here are some key steps in the process.

#### 1. Create a cross-functional implementation team

The first step in implementing a formal SMMP is to create an implementation team. This should involve a range of stakeholders across the divisions in the enterprise. This can include meeting planners, travel managers, procurement, legal, technology, finance, security, training, risk management and others. To the extent that meetings have many stakeholders, your implementation team should reflect this range of interests.

These team members will play a number of roles: data collectors, trainers, decisions makers, implementers, evangelists and more. This core team will develop the strategic plan to move things forward.

#### 2. Collect full meetings data

This is where the significant data collection begins. All of the questions asked in the previous section about questions to ask before approaching senior management, need to be answered more fully and in detail across all divisions of the enterprise. This will require surveys and collecting/analyzing financial spend data, travel spend data and more. It is imperative to have a good baseline understanding of where you are to measure the benefits of where you will be going.

### **3. Choosing your SMMP technology provider**

Technology is the cornerstone of most SMMP programs enabling many of the key SMMP processes including meeting request/authorization, sourcing, calendar, online registration, travel management, cost tracking/reconciliation, analytics/reporting, ROI measurement, and evaluation.

Fortunately, there are a number of good technology providers to choose from providing a range of services and at a range of fees.

These providers are also usually adept in consultative sales. They can share best practices, implementation strategies, cost/benefit analyses, and more. They can be an important partner to guide you through the process and should be relied upon to help.

Consider the providers' size, longevity, feature offerings, and references. A key component for successful SMMP implementation (as with most technology implementations) is ease of use. Scrutinize the user-interface. Have your front line users test it thoroughly before making any final decisions.

### **4. Develop the strategic implementation plan, rollout and timeline**

The implementation team should develop the specific, measurable goals and timelines. Leadership and vision will be required to focus the varied interests into a collective goal to advance the enterprise and improve the meeting management process.

Your technology provider will be able to help you with rollout steps and timeline. This will not be an overnight process. Many SMMP implementation programs for large corporations can take up to three to five years. Plan the rollout communication strategy accordingly.

Seek out advice for colleagues who have gone through the process in other companies. Learn from the successes of others.

A full SMMP implementation is a significant task with many action items. A project management wiki can be helpful in keeping people on task. A business process map should be developed with specific action times, timelines and supporting data.

Typically, the rollout will be in multiple stages over the period of months or years. Many of the components of SMMP outlined in the Section 1 can be implemented in separate rollout stages.

There should be opportunities built in for assessments and corrections throughout the implementation process. Benchmarking of the specific, measurable goals to evaluate the progress should be a high priority.

## **5. Develop an internal marketing and communications plan**

People are resistant to change. The success of an SMMP initiative depends on communicating clearly the goals and benefits. Staff members' natural change resistance and fear of something different must be addressed directly. A strong internal marketing initiative should come directly from the executive sponsor and be followed up by members of the implementation teams.

In one sense, this should start as soon as you reach out to your allies in the very beginning stage. A formal communication plan, however, should be in place as the cross-implementation team is developed and the word is getting out.

This communication can come in a number of forms: staff newsletters, an SMMP implementation website/blog/best practices area, implementation working groups, and more. A wiki to share best practices and to respond to questions can be helpful. Engage the stakeholders and encourage questions, comments and ideas.

Whatever communication methods are used, it will be important to consider carefully how the message and implementation are carried out.

## **5. Conclusions and Summary**

[Back to Index](#)

A successfully implemented SMMP saves money, reduces risk, increases efficiency and improves customer service. The journey, however, is not an easy one nor will it happen overnight. Strong leadership often will be required to overcome the inertia and resistance to change common with many companies. Nearly every part of how meetings data management will change requiring concerted, sustained and focused efforts by many. However, these efforts will pay back in multiples by improving your company's business process through the implementation of SMMP tools and procedures.

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[Back to Index](#)

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