



STRATEGIC MEETINGS MANAGEMENT IN A NEXT-GEN WORLD

By Betsy Bondurant, CMM, CTE

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1 INTRODUCTION

An exciting, new meeting and event (M&E) ecosystem

is currently emerging, largely due to a technological revolution accelerated by the COVID-19 pandemic. This revolution has caused the delivery of meetings and events to change, and executive-level meeting professionals are now rethinking how they design and operate Total Event Programs or Strategic Meetings Management (SMM) programs, taking deep dives into the need for expanded stakeholder groups that now include risk, marketing and information technology (IT) professionals as core—versus periphery—team members.

And despite the core changes brought by new technologies, there exists an understanding that the focus continues to be on people and the best ways to engage participants.

M&E is big business. According to the Events Industry Council, organizations spent US\$1 trillion on M&E globally in pre-pandemic, while individual organizations spent 1% to 3% of their revenue on meetings (depending on industry), according to *Business Travel News*. And meeting professionals play a critical role in validating return on investment (ROI) for this category of spend. From a 2021 survey conducted by Forrester Consulting, 74% of respondents consider events to be their most important demand-generation tactic, so ensuring that M&E spend is maximized is essential to continue to engage and build loyalty with customers, employees and members.

Forward-thinking meeting owners and event marketers understand the need to continue meeting with clients, closing sales, building pipelines and increasing customer loyalty, even when meeting in-person was not an option. Instead of being stymied by the inability to meet face-to-face to maintain or build business, they saw the opportunity that digital technologies could provide in driving business-goal achievement. Although viewed as not-ideal, digital tools were a realistic alternative to not being able to meet with key clients, and as a bonus, they provided an unexpected trove of data and metrics previously unthinkable for large scale events. The ability to measure time spent in a session, expand reach and amplify messaging on a global basis proved music to the ears of digital and event marketers.

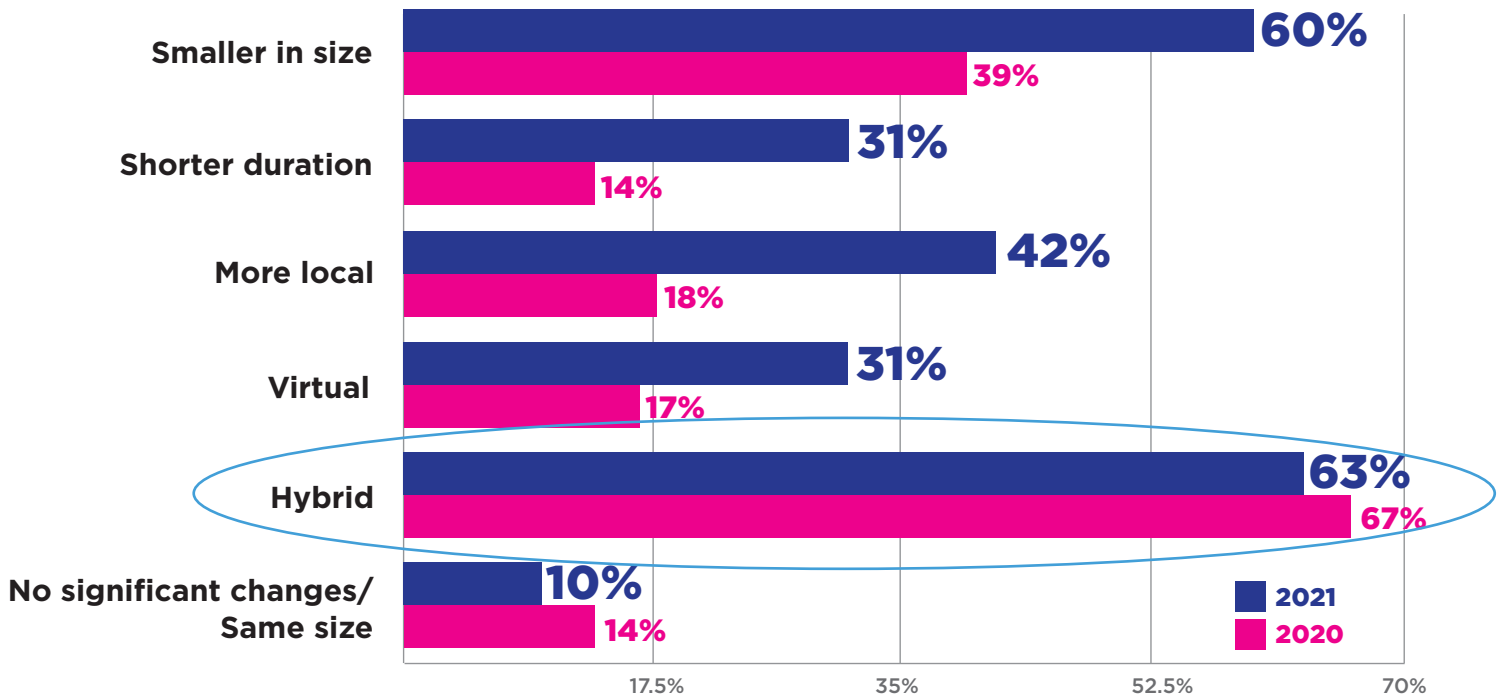
Those who embraced digital technologies for meeting and event delivery early on helped to lead a momentarily frozen industry into the activity of conducting meetings and events by utilizing digital technologies that had previously supported webinars or a small portion of in-person meetings, such as live streaming general sessions, to now delivering entire meetings or events in completely virtual formats.

For many—though not all—there was a learning curve, and meeting owners leaned heavily on their supplier partners to design and deliver meetings using tools that were unfamiliar to them, their presenters, internal stakeholders and their audiences. Educating all members involved in the M&E lifecycle became a critical success factor in producing positive meeting outcomes. Planners and event marketers are now M&E producers and need to be fluent in all three delivery formats: in-person, virtual and hybrid.

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One of the first lessons learned about producing virtual events was the importance of engaging the audience in ways that were meaningful, personal and perceived as valuable uses of time—and selecting the right technology tools that would help achieve those goals. In recent years, some digital tools have been purpose-built to effectively support multiple functions of an event, such as general sessions, breakouts, expo floors and networking. Some of these were effective and others failed to produce positive outcomes or satisfy attendees.

Predicted Change in Formats 2021 vs 2020



Source: *EventMB State of the Event Industry 2021 Report**

As digital M&E evolves from virtual to hybrid (alongside in-person and webinars), selecting the proper delivery method(s) to suit the needs of participants proves essential. Hybrid event options and elements are here to stay, as evidenced in this data from the *EM State of the Event Industry 2021* report, indicating that what has remained consistent over the last year, is the perception that hybrid is the format of the future. Most respondents (63%) say they see their events becoming hybrid in the future. [Read the full report here.](#)

The significant reduction of in-person meetings during the shut-down led to unintended consequences, such as the reduction of carbon emissions; a multi-causal interest in diversity, equity and inclusion; and a focus on health and wellness.

As a result, Strategic Meetings Management (SMM) is evolving. Expanding from a main emphasis on risk mitigation and cost containment, it has transitioned into a critical new pathway

via which meeting professionals assist organizations in achieving sustainability and supplier diversity goals with modified M&E policies and advanced supplier sourcing strategies.

For example, meeting professionals are creating policies, guidelines and strategies that reduce carbon emissions, single-use plastics and general waste from M&E or that include local and minority suppliers in addition to the large national and/or global vendors. Keeping all of those involved in planning and participating in M&E healthy and safe has gained more importance, thus a new emphasis on venue cleaning protocols, the emergence of corporate COVID-19 officers and the creation of cross-functional teams who approve each in-person event. When designing programs, meeting professionals are purposefully integrating wellness within all event formats to help participants achieve wellbeing.

2 NEW WAYS OF WORKING

Flipping the switch

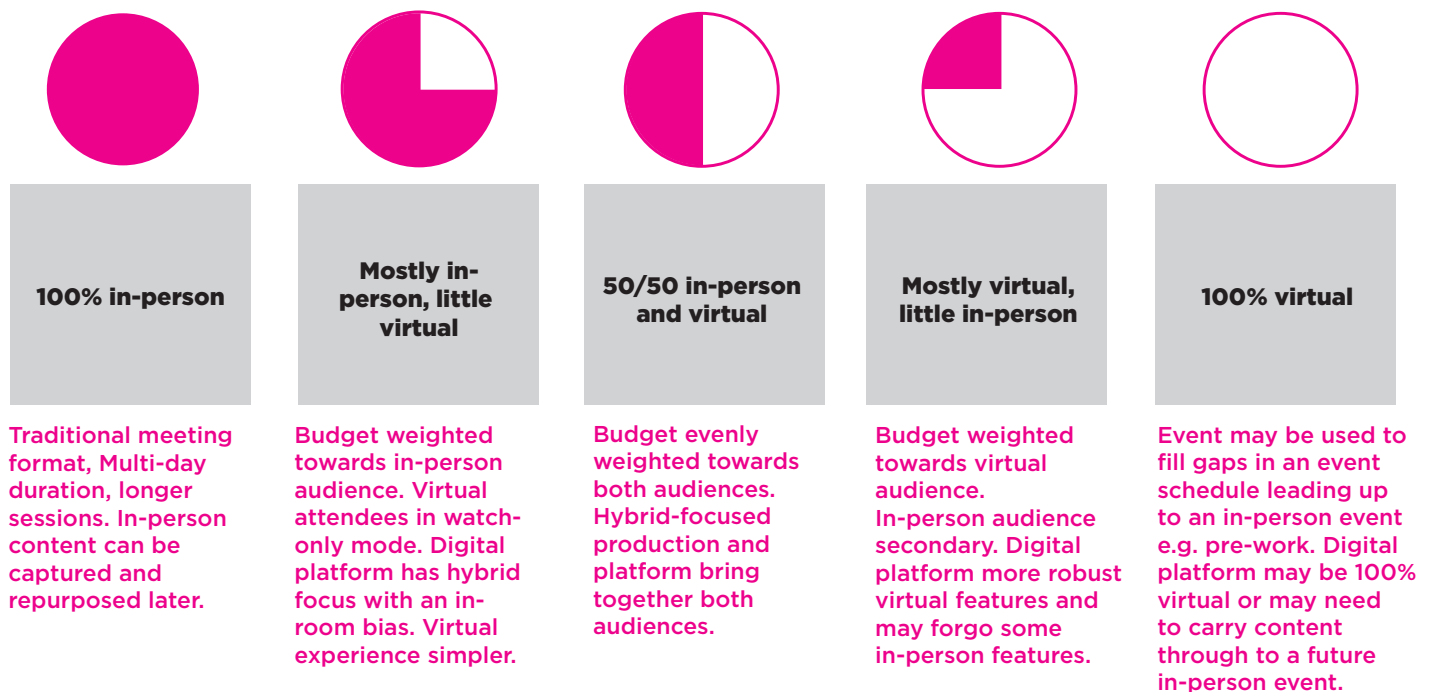
from in-person to virtual meetings in early 2020 was a difficult change for many meeting professionals, but it brought new opportunities to explore what those early adopters of digital M&E had already embraced. Virtual meetings provided huge reach and amplification previously unseen at events held in a single location.

Attendance grew at-times exponentially and internationally; social media views exploded from hundreds of thousands of impressions and engagement to millions. Meeting professionals discovered that the granularity of data from digital technology provides richer insights because so much information can be tracked, including dwell time (how long a participant stayed in a session), the specific interests of key market segments, modules completed during a skilling challenge—all in addition to typical in-person meeting data like participant satisfaction and cost per attendee.

This last data metric—cost per attendee—has become an intriguing metric related to virtual and hybrid M&E. Although technology expenses can be quite high, the amplification of attendance across geography and time can reduce per-person costs dramatically, making return-on-investment practical for engaging with target audiences.

Since the transition from mostly virtual M&E during the height of the pandemic, several versions of the event-format spectrum have developed. The graphic below from the *2021 Events Industry Council Digital Guidebook* depicts a spectrum of five formats from 100% in person to 100% virtual, with variations of hybrid design in-between. Another spectrum identifies six formats: in-person only, broadcast, hybrid, digital-first, digital only, on-demand). Cvent identifies four primary formats: in-person, virtual, hybrid and webinar. Whatever the terminology, it is important to select the appro-

A New Normal: The Event Format Spectrum



Driving the Industry Forward with Successful & Safe Hybrid Events

priate delivery method(s) based on multiple decision criteria: event goals, degree of interactivity, participant expectations, team skills, the planning timeline and budget parameters.

“Beyond a single event format, we’re also seeing the concept on the ‘continuous event’ emerge, says Patrick Smith, senior vice president and CMO at Cvent. “In the digital world, engagement with your customers, employees or peers never has to stop. The continuous event is the idea that organizations can create ‘always-on’ digital environments where they can engage an event community before, during and after their events. Content can now be accessed on-demand and networking online through video is commonplace, so the traditional start and end dates of events start to blur.”

In addition to selecting which event formats to utilize, there is also a new event landscape to consider as noted in this depiction from a 2021 GBTA/Cvent industry study. This landscape takes into consideration the timing of delivery. Is the content for different audiences synchronous (at the same time) or asynchronous (at different times)—knowing the desired level of engagement for participants across education and networking and understanding that venue location can help maximize in-person attendance.

One tactic is a hub-and-spoke (also called pod) design with a main location and several hubs (or equal/equivalent hubs) accessible to more attendees and requiring less travel.

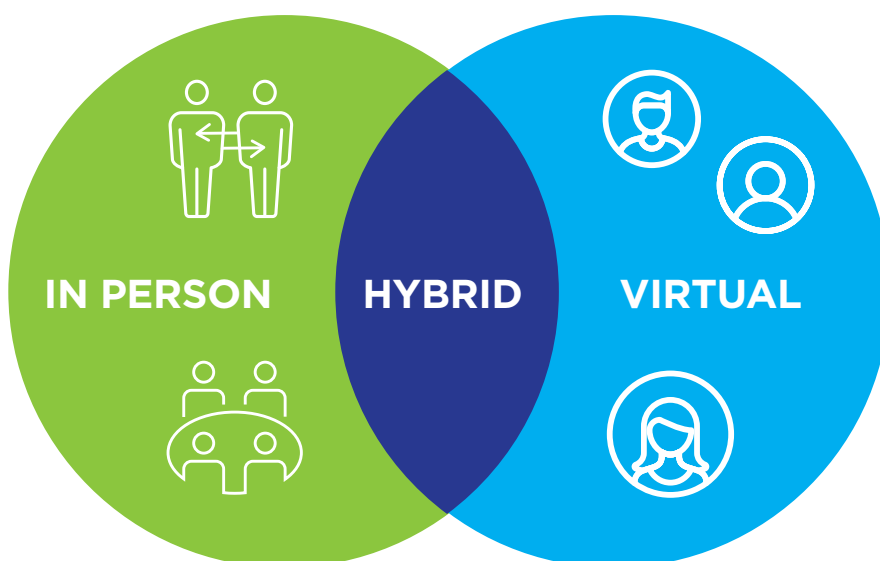
After seeing the swift pivot to virtual across the industry during the global health crisis, MPI leadership knew they needed an innovative approach for their WEC Grapevine conference in late 2020. With the goal of leading the industry to return to safe in-person experiences, they decided to host a hybrid event in early November. “We knew we wanted to go hybrid because we needed to be able to connect with our constituents and be able to move forward,” says Melinda Burdette, senior director of events. “We were bold in our commitment to move forward with an in-person and a fully live, digital event.”

Safely executing the hybrid event meant crafting a strategic plan for both the digital and in-person experiences. MPI needed to track and measure data points across both audiences using a centralized platform. They used Cvent’s Event Management solution to ensure a seamless registration process, allowing attendees to choose the right experience for their comfort level and education needs.

MPI knew the flexibility of the system could field changing attendee needs as the global situation evolved. For example, the registration system could easily manage cancellations or conversions to digital with unique price points and other mitigating factors. “We also implemented a risk-free registration opportunity because so many of our attendees were experiencing hardships due to the pandemic,” Burdette explains. MPI integrated the registration tool with the Freeman virtual OEP platform to ensure a seamless data flow between systems. This gave their team on-demand reporting to help prove event ROI.

For the full case study, [go here](#).

A New Event Landscape



- ✓ Attendees are in multiple locations; in-person and virtual
- ✓ Attendees may mix but are not required to
- ✓ Content may be consumed at the same time, but experience should be optimized for each audience
- ✓ Attendees may have different drivers for engaging in each experience

Understanding and utilizing all of these options allow M&E producers the opportunity to layer content with multiple delivery methods and touchpoints, thus maximizing access both during and after the event.

“When thinking about what event format is right for you, start with your event goals, attendee mix and geographic implications,” says Julie Haddix, senior director of solutions marketing at Cvent. “If your event is all about a wide content reach, virtual may meet your goals. If it’s a group of local people who need a conversation, in-person would make sense. If you need to bring together a wide geographic mix, hybrid may make sense, potentially with a ‘hub’ model. No matter what you choose, you also don’t have to go ‘all-in.’ Think about what has to be live, what could be simu-live and sessions that could be pre-recorded for on-demand viewing.”

There has been an explosion of stand-alone event technology platforms rushed to market recently in order facilitate virtual M&E production for a wide range of internal and external events. See the infographic below. With so many technologies available and the need to integrate them into other corporate tools such as Customer Relationship Management (CRM) systems, event programs and financial systems, it may be time to consider concepts like Cvent’s Total Event Program (TEP)

“

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so that there are fewer disparate technologies to manage when delivering M&E. Whatever the technology tools in use, it is critical to remember that the focus needs to remain on participants and that the technology is simply one of the instruments used to produce and manage meetings and events.



3 EVOLVING STAKEHOLDER ENGAGEMENT

Seventy-five percent

of companies surveyed had a C-level executive (think Chief Financial Officer, Chief Technology Officer or Chief Executive Officer) involved in the decision to hold M&E post-shutdown, according to 2021 research by GBTA and Cvent. Gaining high-level visibility into the meetings and events contracted and delivered during COVID-19 became essential to most organizations.

As M&E needed to be cancelled or postponed because of COVID-19 restrictions, those with an SMM in place could quickly and easily determine what was already contracted and what potential penalties were estimated to be. SMM owners worked with their suppliers to either reduce or eliminate penalties or rebook for future programs without penalty. They proactively shared this information with leadership and recommend strategies for minimizing both financial and reputational risk. Many also gained a seat at the table of those determining

how and when the return to face-to face meetings would occur, continuing to demonstrate their value to key stakeholders within companies.

“Marketers and SMM practitioners historically spoke different languages,” Haddix says. “Marketers focused on driving leads and increasing sales pipeline while SMM practitioners focused on efficiency and cost-savings. The pandemic saw these two groups finally speaking the same language. Together, teams had to figure out how to produce virtual events that engaged attendees and achieved business objectives. As we return to in-person, and all event formats remain a part of the total event program, these groups now have common ground on which to operate in the new event landscape.”

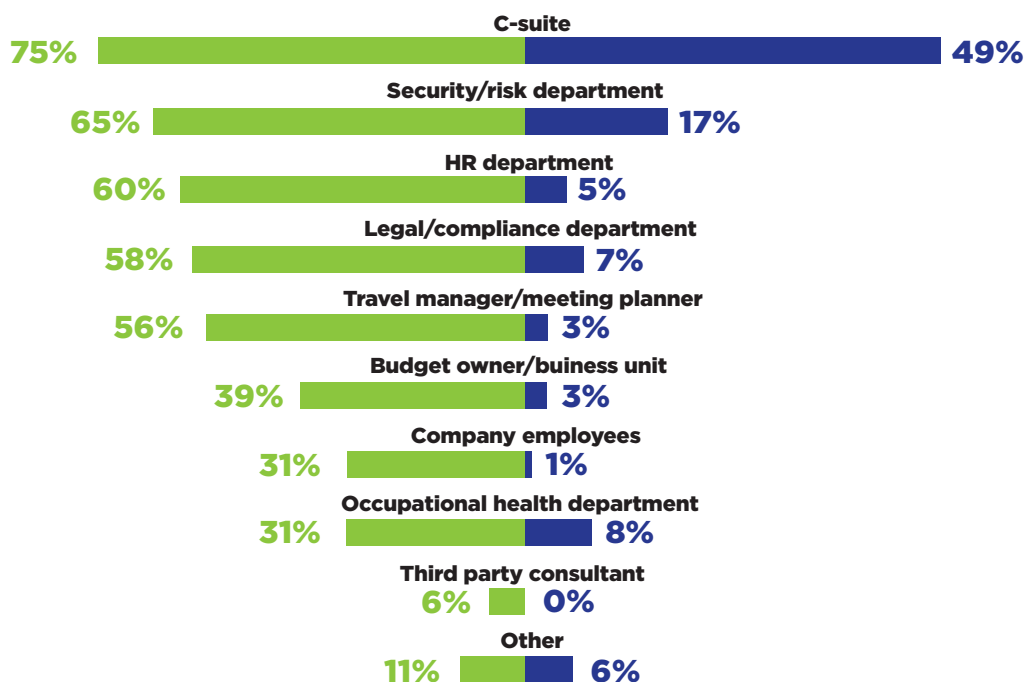
Conversely, those organizations with no central view to their M&E were unsuccessful in capturing the total M&E spend and paid significant cancellation penalties because of

Who's Involved in Decision?

multiple answers allowed

Who has most influence?

one answers allowed



poorly negotiated contracts, and likely still don't know the entire impact to the organization. With more interest at the C-level, came more scrutiny about overall M&E spend, savings and risk mitigation.

Progressive meeting professionals have taken this as a golden opportunity to make the case for the development of SMM programs, which maximize M&E spend, minimize contract cancellation fees and provide actionable data regarding enterprise-wide portfolios. These meeting leaders understand the value of engaging with key stakeholders within organizations to gain support. Following are some of the new and old members on the expanded stakeholder map.

- **Information Technology:** IT involvement means these leaders are the new cooks in the kitchen, now an essential part of the digital technology evaluation team creating confidence when selecting digital platforms that align with corporate guidelines and avoiding cyber security breaches that would expose personally identifiable information (PII) and/or organizational proprietary information.

- **Data Analyst:** With the rise of digital tools and their ability to capture volumes of data, the need for experts in data analysis has increased. This role joins the team in determining business objectives at the start of the planning process, building the framework to capture information, examine the data and provide actionable insights and program metrics to determine ROI and the delivery of goal attainment.

- **Demand Generation and Digital Marketers:** Digital teams, which may not have previously realized the power of events as a marketing channel, now see the opportunity technology provides and are reaching out to meeting professionals to benefit from their skills and expertise.

- **Event Marketers:** Event marketers usually prefer to work outside of the realm of SMM, using their niche suppliers without restriction. Recently, they have become aware of the value and support that an SMM program can provide with navigating multiple delivery methods in the new event landscape (in-person trade show, virtual webinar, hybrid roadshow).

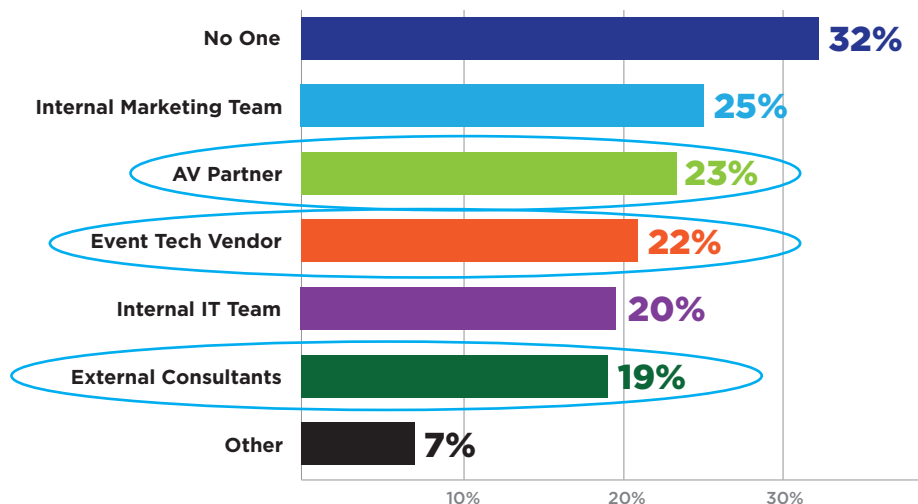
- **Security & Risk:** Typically, these players have been in the periphery of the stakeholder group. Pre-pandemic, they were asked to do risk assessments

on various high-level or highly visible events or to advise on the creation of crisis management plans. Since the pandemic, many organizations have expanded the role of security to help avoid reputational risk and increase Duty of Care for meeting participants by validating cleaning protocols at venues and ensuring local regulations are followed.

- **Legal Counsel:** An organization's lawyers have always been involved with negotiating favorable contract clauses, now there are net-new conversations with legal regarding revised and/or new clauses about health and safety to help protect organizations from penalties and fees, as well as attendee safety and health and its implications on potential liabilities associated with in-person events.

- **Suppliers:** Partner relationships have deepened as the degree of reliance and communication exponentially increased. Meeting professionals are leaning on technology suppliers to guide them through the new landscape of digital technologies. Communications during contracting and planning stages start earlier and are much more detailed, covering not only modification of contract terms and usual planning activities but also insights on local regulations, current cleaning protocols and details on how other groups will interact with programs. More than 60% of meeting professionals depend on industry experts outside of their organizations to create hybrid strategies and deliver on hybrid events, according to the *EM State of the Event Industry 2021* report.

Sources of Support in Designing Hybrid Strategies



Source: EventMB State of Event Industry 2021 Report*

4 SUSTAINABILITY, HEALTH & WELLNESS

As COVID-19 persists,

there is a growing sentiment of online M&E fatigue; however, meeting participants have benefitted from the convenience and accessibility of digital events and the digital delivery of content will continue. The benefits of online learning include improved quality of life (time away from home and family) and reduced carbon emissions. Hybrid and virtual M&E support the goals of Diversity, Equity, and Inclusion initiatives by enabling those who may not have the financial means to travel to participate in meetings and collaborate with peers in multiple geographic locations. It is important to note that the lack of universal Internet access remains a global concern and barrier to entry for millions of people around the world.

Global carbon emission levels were down a record 7 percent in 2020, according to the Global Carbon Project (GCP). Many companies are in the process of revising travel and meeting policies to help achieve their carbon goals by limiting air travel, reducing meetings size and using green-certified properties, among other strategies.

Other examples of reducing the volume of F2F meetings include instituting a cadenced approach to meeting delivery. For example, an organization with four annual board of director meetings may now hold two online and two in-person. Another approach is to reduce travel distance for attendees and use cars, trains and light rail instead of air travel. Creating a hub-and-spoke hybrid meeting design with a central event location and multiple regional locations can help accomplish this.

Millennials and Gen-Z regard climate change as the most important issue of their generations, according to ThrustCarbon (a company that helps organizations operate sustainably), and they will keep the industry motivated on changing behavior to positively impact the environment.

Recent industry sustainability advancements include the following.

- In December 2021, United Airlines became the first airline to operate a 100% Sustainable Aviation Fuel (SAF) passenger flight in the commitment to its eco-skies initiative.
- BP created a free tool kit and carbon calculator by Target Neutral for designing more environmentally friendly M&E

- MGM Resorts International completed substantial construction on its Mega Solar Array in North Las Vegas.
- MPI offers its Sustainable Event Strategist certificate program to global students. [Learn more here.](#)
- The Clean the World Foundation has served more than 15 million people in over 127 countries.

“As we talk to our customers, we’re seeing many global enterprise organizations at the forefront of change, driving their leadership teams to embrace sustainability requirements within their event strategies,” says Karen Carter, Cvent’s director of enterprise marketing in Europe. “These requirements cover things like being more thoughtful about in-person vs. virtual meetings, selecting properties that employ their own sustainability practices and setting carbon emissions goals for their employees and travel departments.”

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Meanwhile, the focus on individual health and wellness continues.

According to the University of Maryland, “Wellness is fueling your body, engaging your mind and nurturing your spirit. How we think about wellness is affected by our culture and our life experiences.” By purposefully integrating wellness into the design of experiences of all formats, meeting professionals can help attendees achieve better overall wellness.

Meeting professionals who utilize the eight dimensions of wellness during the design process create integrated well experiences that rise above bolt-on physical wellness activations like yoga breaks or gamification programs. The eight dimensions include emotional/mental, environmental, financial, intellectual, occupational, physical, social and spiritual.

5 THE FUTURE OF SMM

Aspects of the new M&E landscape

have combined to have an overall impact on design of SMM programs. What was important previously—such as mitigating contractual risk and cost savings—may not be top priorities now. The components of SMM are being re-examined and revisited so they better align with the current business environment. For almost 20 years, the industry has used the GBTA SMM Wheel as the gold standard for SMM program design. To the right is the most recent version.

Consider the following evolving aspects Strategic Meetings Management.



STAKEHOLDERS

An expanded list of stakeholders now includes marketers, IT and data analytics; broader responsibilities for security and legal; and increased engagement with supplier partners.

STRATEGY

New sourcing strategies help organizations achieve sustainability goals; purchase from more local purveyors; and include smaller, diverse suppliers alongside national or global vendors.

POLICY

Revised M&E policies include guidelines regarding utilization of virtual/hybrid events (who attends and how) and approved suppliers (green meeting guidelines).

TECHNOLOGY

Technology tools enable more widespread adoption of digital events, creating ties to cyber security and PII policies and leading to the need for Total Event Program design.

REGISTRATION

Updated approval requirements create more visibility, reduce reputational risk and increase duty of care. M&E registration data security leads to regional review and approval policies.

EVENT OBJECTIVES

Meeting professionals put more effort into defining event objectives with new collaborations with event/digital marketers and data analysts.

SOURCING & PROCUREMENT

Net new collaborations with suppliers regarding technology capabilities, cleaning protocols and contract clauses mean stronger overall relationships.

PLANNING & EXECUTION

Expanded teams consist of virtual- and F2F-specific staff, digital technology and A/V production, audience engagement specialists, social media, onsite medical and COVID-19 Compliance officers.

PARTICIPANT EXPERIENCE

A new focus on what the participant wants and needs will lead to more sustainable meetings, health and wellness integrations and options to participate remotely or in-person.

PAYMENT & RECONCILIATION

Virtual payment continues to gain popularity; however, the payment and reconciliation process continues to be a pain point for many organizations with older financial systems.

DATA ANALYSIS AND REPORTING

Much more granular data makes for better ROI analysis, and new metrics help evaluate M&E success with more actionable data to manage enterprise-wide M&E portfolios.

“Many customer meeting policies and procedures have evolved during the past 18 months,” says Allison Hamil, senior director of professional services at Cvent “These changes focus on safety and the attendee experience with the return to in-person or hybrid events. Some have introduced new attendee-level approvals, pending health screening protocols before registration confirmation is sent. Those clients are eager to deploy the new Cvent Health Check feature. Several plan to use it for hybrid

internal meetings such as annual sales kickoffs. Other clients use Cvent technology to automate additional meeting-level approvals for meetings with an in-person audience. Common elements include new registration sections, as well as automated routing to legal, environmental health or other safety departments for visibility and compliance reasons. This extra step keeps attendees safe and helps customers manage risk while protecting attendee privacy and leading to great attendee experiences.”

6 CONCLUSION

A new meeting and event

landscape has emerged due to the technological revolution accelerated by the COVID-19 pandemic's impact on in-person meetings. M&E managers, event and digital marketers and SMM program owners have all experienced and adapted to rapid change.

Many M&E professionals are upskilling or reskilling to not only effectively design and operate hybrid and virtual events (see MPI's certificate programs [here](#)) but also to address automation and artificial intelligence, which are also impacting their jobs. Meeting professionals are exploring new technologies and incorporating them into the design and delivery of M&E, but not at the expense of a focus on people.

Technology now offers an enhanced means of creating participant experiences that touch emotions, inspire action and change and match the interests of those participating. Keeping these digital solutions simple with integrated systems can increase ease of use and satisfaction among presenters, sponsors and participants. Although M&E professionals and producers are embracing digital technologies, there is still a need to lean on suppliers for their expertise and ability to extend bandwidth.

When evaluating tech partners, look to suppliers who can support the majority of the M&E lifecycle in addition to helping to curate and facilitate meaningful and impactful M&E.

Savvy SMM practitioners realize that this is the prime time to either refine an existing SMM program or gain buy in for the creation of an enterprise-wide SMM. There is now more C-level attention on the value of M&E, and the fees and penalties paid for pandemic related cancellations provide a compelling business case for SMM. Additionally, organizational goals and objectives have changed and SMM programs can truly assist in achieving these goals in the following ways.

- Reducing the environmental impact of M&E
- Creating more (though still limited) inclusion via virtual and hybrid meetings
- Increasing the use of diverse suppliers through strategic sourcing
- Mitigating reputational risk and increasing health and safety via more stringent approval processes
- Improving return on investment reporting by utilizing granular data available from digital technology tools

YOUR CALL TO ACTION: Take advantage of the recent learnings from the rapidly advancing meeting industry. First, don't be afraid to explore new technologies and fully embrace hybrid and virtual as an extension of your in-person M&E. Second, no matter what the current state of your SMM (if any), make it a priority to refresh your program or commit to exploring the potential of implementing one, if only to gain visibility to enterprise-wide M&E so that there are controls in place to protect your organization.

Betsy Bondurant, CMM President, Bondurant Consulting



Betsy Bondurant, CMM, offers a unique 360° perspective with expertise in hotel sales, meeting and trade show management and procurement, including 20 years of direct involvement in the discipline of Strategic Meetings Management (SMM). Betsy implemented a pioneering corporate-wide Strategic Meetings Management program at the world's largest Biotech company. In 2007, she moved from corporate meetings into consulting, dedicated to providing unbiased assessments and recommendations for SMM programs. Betsy is a professional speaker and expert and has authored many articles, developed educational content and presented to global audiences. She is currently chair of the digital guidebook subcommittee for the Events Industry Council (EIC) APEX Commission. Betsy earned the GBTA Presidents Award in 2021 and was recognized in the inaugural 15 over 50 by Connect Corporate in 2019. Betsy has been recognized as one of Top 25 Women in the Meetings Industry by *Meetings and Conventions* magazine and one of *Meeting News'* 25 Most Influential People in the Meetings Industry. She has earned MPI's Chairwoman's Award and is a *Business Travel News* Best Practitioner.



About Meeting Professionals International

When we meet face-to-face, it empowers us to stand shoulder-to-shoulder. That's why MPI strives to lead the world in education, networking and innovative solutions that advance not only the meeting and event industry, but the careers of the professionals in it.

Through MPI's global network of local chapters, we activate, educate, support and connect the connectors—people who are passionate about bringing people together. MPI serves the entirety of the meeting and event industry, regardless of need, audience or specialization. MPI delivers leadership and education that are not only credible—they're actionable. We empower our community to visualize and execute one-of-a-kind experiences that inspire people to evolve their outlooks, reexamine their preconceptions and take positive action.

Because when we meet, we think in ways previously unthought. Because when we meet, we break through barriers that kept us apart. When we **meet**, we change the world.*

For more information, visit MPI.org.



About Cvent

Cvent is a leading meetings, events, and hospitality technology provider with more than 4,000 employees and nearly 21,000 customers worldwide. Founded in 1999, the company delivers a comprehensive event marketing and management platform and offers a global marketplace where event professionals collaborate with venues to create engaging, impactful experiences.

Cvent is headquartered in Tysons, Virginia, just outside of Washington D.C., and has additional offices around the world to support its growing global customer base. The comprehensive Cvent event marketing and management platform offers software solutions to event organizers and marketers for online event registration, venue selection, event marketing and management, virtual and onsite solutions, and attendee engagement. Cvent's suite of products automate and simplify the entire event management process and maximize the impact of in-person, virtual, and hybrid events. Hotels and venues use Cvent's supplier and venue solutions to win more group and corporate travel business through Cvent's sourcing platforms. Cvent solutions optimize the entire event management value chain and have enabled clients around the world to manage millions of meetings and events.

For more information, visit Cvent.com.