

EVOLVING ROLES IN MEETINGS MANAGEMENT



Over the past two years, the roles and responsibilities of meeting managers have undergone a rapid evolution in response to dramatic changes in event venues and formats, and the technologies and resources needed to make them effective.

This report will examine key forces that are reshaping how meeting managers work, and the skill sets needed to meet the demands of their jobs, as businesses struggle to adapt to the new normal in the wake of the global Covid-19 pandemic. Coverage includes:

- ▶ Macro changes to work and the workplace that will impact meetings and events in 2022 and beyond
- ▶ Defining trends in meetings/event management and technology
- ▶ Shifts in sourcing and contracting
- ▶ Changes to internal organizational dynamics of decision making and stakeholder involvement
- ▶ Looking ahead

THE NEW SHAPE OF WORK

In its comprehensive research report on [Future of Work Trends Post COVID 19](#), executive consulting firm [Gartner](#) identified the increase in employees working remotely as an ongoing trend that will accelerate in coming months.



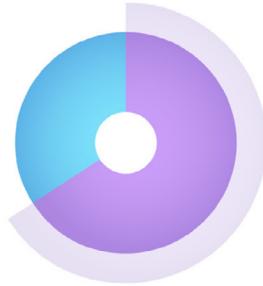
Even after vaccines are more fully rolled out, research by [McKinsey Global Institute](#) on the [future of work](#) estimates that close to two-fifths of U.S. jobs could be done remotely to some degree without loss of productivity. While these figures will vary greatly by industry type of job, McKinsey found that 22% of U.S. jobs could be done remotely for 3-5 days a week; 17% of jobs could be done remotely 1-3 days a week; and the remaining 61% of jobs could be done remotely only for 1 day a week or less—all without sacrificing productivity.

An [independent research report](#) conducted by [Edelman Data & Analytics](#) for Microsoft in the first

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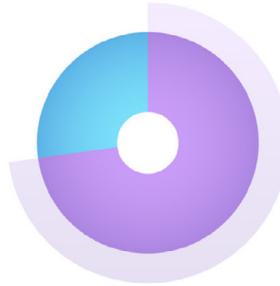
Hybrid work is inevitable

Business leaders are on the brink of major changes to accommodate what employees want: the best of both worlds.



66%

of leaders say their company is considering redesigning office space for hybrid work



73%

of employees want flexible remote work options to stay



67%

of employees want more in-person work or collaboration post-pandemic

Source: The Work Trend Index survey was conducted by an independent research firm, Edelman Data x Intelligence, among 31,092 full-time employees or self-employed workers across 31 markets between January 12, 2021 and January 25, 2021.

quarter of 2021 described this shift to a hybrid, or blended, work model as “a disruption as great as last year’s sudden shift to remote work.” The report, which included responses from more than 31,000 full-time and self-employed workers across 30 markets, found that employees want the best of both worlds: 73% of workers surveyed want flexible remote work options to continue, while at the same time, 67% are craving more in-person time with their teams.

“Last year’s move to remote work boosted feelings of inclusion for workers because everyone was in the same virtual room,” noted the report. “The move to hybrid will break that mold and it will be a new and important objective to ensure employees are given the flexibility to work when and where they want, as well as the tools they need to equally contribute from wherever they happen to be.”

How will such changes impact the need for meetings, the form they take or how they are planned? **Read on.**



PLAN FOR MORE HYBRID MEETINGS

While the hybrid remote work model transforms every aspect of doing business in the broader sense, meeting managers are facing a parallel set of disruptions and demands around the expected increase in hybrid meetings in 2022.

Industry research indicates a majority of planners expect to hold hybrid meetings in 2022, up more than 10% compared with 2021. According to a [research report](#) conducted in the first quarter of 2021 by the Global Business Travel Association (GBTA) and sponsored by [Cvent](#), two-thirds of respondents (65%) said they are interested in holding more hybrid meetings in 2022 as a result of the pandemic. More than half (55%) said their primary hesitation is the potentially negative impact of hybrids on remote attendee engagement.

“Remote attendees might have difficulty participating in education sessions, networking with



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other attendees, and visiting expo booths among other challenges,” said the report. “As a result, they might realize less value from attending than in-person attendees.”

Engagement has become a critical concern for planners based on the expected increase in hybrid events.

“We see a renewed focus on audience engagement and content,” said Jenny Lust, Senior Director, Solutions Design, at BCD Meetings and Events. “Content is king right now, especially in a virtual environment where you need a different type of content to really engage that audience.”

According to Rachel Andrews, Senior Director of Meetings and Events for Cvent, “We have put more focus on engagement by increasing the number of people on our team that help with technology. We’ve also expanded our investment in program owners, as well as research into which KPIs (key performance indicators) work best for which meetings formats, and what the market wants to see.”

ADAPTING TECH TOOLS TO INCREASE ENGAGEMENT



While acknowledging that modern meetings programs have relied heavily on technology to explore venues, issue requests for proposals (RFPs), create room diagrams, register attendees, manage room blocks, and survey attendees post event, among many other tasks, the GBTA research report pointed out that many planners have needed to adapt these tech tools to meet the new challenges of meeting management during the pandemic.

The research also showed that a majority want to use technology specifically to help engage virtual attendees in hybrid and fully remote meetings and events.



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—Jenny Lust,
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BCD Meetings and Events

Seven in 10 planners surveyed in the GBTA study said they are interested in using live polling to allow virtual attendees to participate in education sessions even if it is difficult to raise their hand and speak. Ideally, a chat feature would allow virtual attendees to ask questions or share thoughts. Seventy percent of planners surveyed also said they are interested in using attendee tracking/lead tracking for virtual meetings. More than two-thirds (66%) said they are interested in using an event mobile app for virtual meetings, a function that would help remote attendees reach out to exhibitors and network with other attendees.

INCREASED FOCUS ON PRODUCTION



Production value also plays a key role in engagement for hybrid and virtual meetings, and planners and the industry at large have responded.

“The pandemic gave us some time to dig into what was working, and production has taken on a bigger role,” said Andrews. “We’re doing advanced production coordination, and we’re doing run-of-shows for virtual and hybrid meetings—and with hybrid you’re doing two run-of-shows, one for in-person and one for virtual. We’re making sure that the production is worthwhile for attendees to sit there and watch.”

ONLINE CERTIFICATION COURSES FOR VIRTUAL MEETING PLANNERS



Some organizations have developed training and certification programs to help planners understand the demands of virtual and hybrid meetings and manage them effectively.

- Cvent Academy offers a free Virtual Events certification program that covers the knowledge and skills needed in the evolving virtual meetings landscape from conception and execution to post-event data analysis.
www.cvent.com
- The Virtual Events Institute has developed the VEI Skills Community for event professionals. The membership model features on-demand content that includes educational opportunities, networking, reports, and a downloadable skills training guide, as well as members-only events. Community members are able to tap into insights, expert knowledge, and peer-to-peer advice in the virtual and hybrid space.
www.virtualeventsinstitute.com

Finding the technology and production expertise to produce virtual and hybrid meetings has been one of the biggest challenges facing planners since the onset of the pandemic, and that challenge is likely to continue through 2022. While industry research showed that two-thirds of planners reskilled existing staff for production and support on new tech platforms, that approach won't work for everybody.

"A lot of event professionals are wise to get some external support when it comes to assessing production capabilities, especially if they are going hybrid," advises Kim Scott, founder of Genomicom. "It seems that there is a new hybrid platform out every single day, and they all have different features and different cost structures. Choosing the right

one to support your needs is not necessarily a straightforward task. Unless you are a techno geek, you need someone to survey the landscape of these tools and platforms and make recommendations for the right platform for your event."

Smaller organizations that don't have the human resources to reskill staff and part-time planners would most benefit from seeking outside help in evaluating tech platforms, she said.

Scott noted that the focus on virtual-only meetings during the early stages of the pandemic initially "leveled the playing field for many smaller organizations" who did not have the budget or reach to create in-person events, giving them a better place at the table. That advantage quickly faded and became in some cases a double-edged sword.

"Once companies got into it, they saw the complexities on the production side — contracting, engagement, the need to pivot on a dime from one platform to another—so now things have leveled back off for those smaller organizations," said Scott. She advises smaller companies to adopt a complete end-to-end meetings solution. Additionally, "They have to understand their strategy and their why—why are they doing this event. With that perspective, they do have a better place now at the table."



SOURCING SHIFTS TO PLATFORMS AND PROVIDERS

A key challenge for planners in today's pandemic-recovery environment is determining what tasks to outsource and what to handle in-house through reskilling.

According to Scott, planners are now spending the majority of their sourcing time on securing platforms, including production vendors and AV



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equipment companies. “If it’s a hybrid event,” she added, “we’re sourcing virtual venues in addition to hotels.” At Cvent, Andrews noted that, “Sourcing virtual platforms has expanded for us, and that has required us to learn new skill sets.”

While some organizations have the human resources available to make reskilling existing staff a viable option, many others are combining the use of internal producers and outsourcing production for some events, a trend that is likely to continue through 2022.

That decision often hinges on the scope of the event, according to Andrews. “If you don’t want to train event organizers to do producing, then partner with a staffing organization,” she advised, noting that some virtual platforms have producers on tap and might also be partnered with an AV company that can support hybrid events. “If your run of show is very complex,” she added, “you might want to think about getting an outside producer.”

Lust has observed an even deeper examination of the entire meetings and event function within some organizations, and they seek to use all internal resources to rebuild their business.

“Now that stakeholder engagement, content creation, and other core components of meetings man-

agement have become more critical, we are seeing a shift in what is being outsourced,” said Lust. “The process is longer and more cumbersome, and some organizations are finding that meetings and events may be an area they no longer need to manage in house considering that attention and resources potentially need to be elsewhere.”

Small and simple meetings take center stage. The trend toward primarily virtual small and simple meetings accelerated in the past 20 months and is currently “a really huge trend in solution design right now,” according to Lust.

“For many years we talked about small, simple meetings as being under the iceberg,” said Debi Scholar, Global Procurement Category Lead at a pharmaceutical company. “A lot of these meetings were unmanaged because many organizations tended to believe they had less risk and less visibility, and therefore did not require a lot of time spent on managing them. Now small meetings are under a microscope, and the industry has worked hard to bring out technology and processes and contracts to manage small meetings better.”

Small meetings are also leading the way to the return of in-person events. A majority of planners surveyed in the GBTA study said they anticipate that in-person meetings of 50 or fewer attendees will return to the pre-pandemic levels at their companies within the year. That compares with respondents who said they anticipate it will take roughly two to three years for in-person meetings with more than 50 attendees to return to their company’s pre-pandemic volume.

CONTRACTING: IT’S A SELLER’S MARKET



Meeting planners should be aware that the buyer-seller dynamic—always in flux based on an array of internal and external



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economic and industry conditions—has shifted since the start of the pandemic in favor of sellers.

“Compression is real,” Lust said. “It is a seller’s market in terms of what is available across every aspect of the meetings and events supply chain. Demand is high, and if you are not ready to move on a contract, I guarantee you there is another buyer right behind you that will be. Everyone wants flexibility, but both buyer and seller need to have a certain level of risk tolerance right now.”



“PROJECT MANAGEMENT IS A CORE COMPETENCY IN MY OPINION AND IF YOU HAVE THE OPPORTUNITY TO LEARN MORE ABOUT IT, MAYBE TAKE SOME CLASSES ON IT, IT’S SOMETHING THAT REALLY HELPS DRIVE YOUR MEETINGS PROGRAMS.”

— Rachel Andrews, Senior Director of Meetings and Events,
Cvent

During the continued uncertainty in the marketplace resulting from the pandemic, Scholar advises both planners and suppliers to, “Continue to be good partners with each other. The marketplace is very different than it was before, and it is going to continue to change. Things have shifted from a time management perspective in this new environment we find ourselves in, and some suppliers are still struggling with resource and supply chain challenges. Set realistic expectations from a buyer-supplier perspective at every level of the timeline we live in. Being clear in terms of managing expectations will help everyone to move forward.”

Scholar noted that as a result of the multiple cancellations and subsequent efforts to secure vendor credits that planners have been dealing with since early 2020, “many organizations are looking into how to make contracting more routine, even

turnkey, by allowing certain terms and conditions to remain untouched.”



CROSS-TEAM COLLABORATION IS KEY

One of the most significant and widespread changes in meetings management since the advent of the Covid-19 pandemic has been an increase in organizational collaboration to plan, approve and review meetings and events.

Meetings managers and teams now collaborate more closely—or, in some cases, for the first time—with cross-functional teams including travel, human resources, legal, safety and security, compliance, technology, procurement, finance, marketing, and other business units as they work together to deliver effective and measurable in-person, virtual, and hybrid events.

“We are seeing much higher levels of collaboration within organizations today because there is a need for more variable resources across the board,” Lust said. “We’ve moved somewhat from a dedicated space for meetings to a little more flexible, agile and hybrid approach in how organizations are looking at managing their meetings programs.”

More than ever before, meeting planners now rely on collaboration with HR, legal, and health and safety teams to manage levels of risk and onsite best practices, and comply with organizational policy, government regulations, and rapidly shifting Covid mandates from multiple sources.

In addition, while marketing and branding teams have always been incorporated into meetings and events, “that collaboration has been higher than ever today,” according to Lust. “There has also been a massive focus on working with tech teams, as there are so many new solutions to incorporate into tool sets and higher levels of production have been

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needed since the start of pandemic restrictions," she said. "In contracting, how we are managing data in this space, and what data points are needed now to move forward, have become even more important. That has changed what needs to be tracked."



WORKING WITH PROCUREMENT

Procurement has become a key collaborator for many meetings managers as new platforms and tools have been required to conduct virtual and hybrid events.

"There are meeting planners who have had to recognize how to work with procurement and getting the required data analytics on a regular basis to validate the value of all of these different channels we are using today," Scholar said. "If meetings does not sit in procurement, it is really important that procurement is a key stakeholder."

Finance has also become an even more crucial collaboration partner for meetings. "I want to get budgets and I want to see the results from

finance," Scholar added. "Without numbers and data, you can't prove the value return on investment, or the return on engagement. Getting that piece of the pie from finance and anybody else who is collecting the data is really critical."

Andrews recommends that planners use data to elevate their conversation with procurement, finance, and other stakeholders.

"Data is your biggest weapon in terms of having management listen to you and getting the resources you need," she said. "Don't underestimate the number of hours these new event formats take. Prioritize requests based on scope of the event and the desire to impact. You may need to get budget approval for outside staffing or hire more people."

TEAMING WITH TRAVEL AND TMCS

Lust said a less obvious collaborative trend she sees is between the meetings and travel teams. "A lot of organizations are



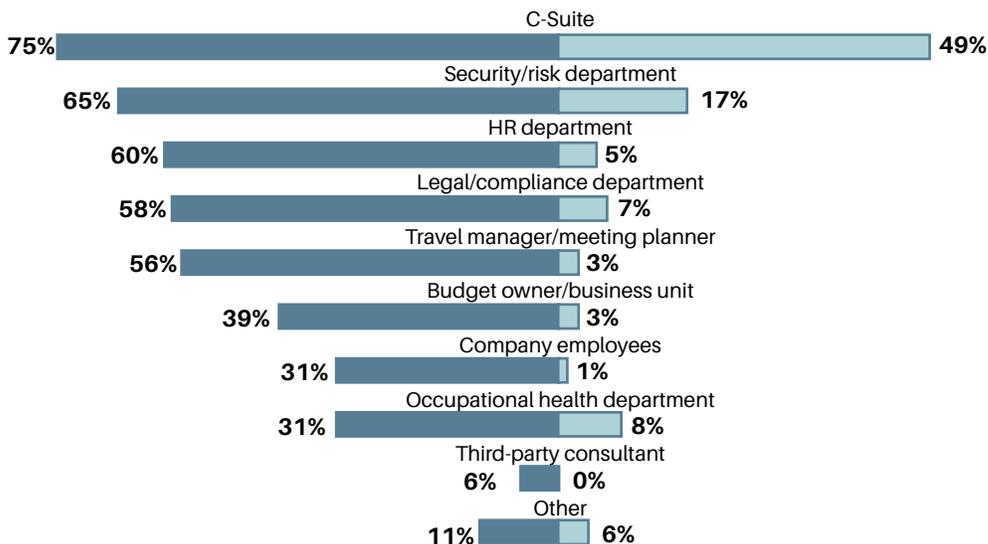
taking the time now to look at what it might mean to integrate these across supplier sets and leverage a total spend versus a categorized spend," she said.

Added Scholar, "It always surprises me that there are groups that don't combine meetings and travel. I find it extremely frustrating that groups don't use their primary TMCs, because you can lose rates and credits, and the ability to track your travelers. When I see the disconnect between the TMC and the group travel agency I ask for the 'why' behind it, because most of our TMCs can manage group travel. They are also a key stakeholder."

Stakeholders Deciding Whether to Hold Meetings

Who's involved in deciding if it's safe to hold meeting/event? (Multiple answers allowed)

Who has most influence over decision? (One answer allowed)



Source: [Global Business Travel Association / Cvent "How Will the Coronavirus Pandemic Reshape Corporate Meeting and Event Planning?"](#) April 2021

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The review process for meetings has also become more inclusive in the last two years, a trend that is likely to remain in place for many months to come. In particular, there is a higher level of involvement in the review process to bring in the perspectives of the risk, compliance, health and safety, and legal teams.

C-suite executives have been playing a more central role in reviews and approvals since the start of the pandemic. According to the GBTA research report previously referenced, 75% of survey respondents said C-suite executives are involved with deciding if it is safe to hold a meeting or event in the current environment. Moreover, half (49%) also said C-suite executives yield the most influence in that decision.



WHERE THE MEETING FUNCTION SITS

While the meetings function most often reports or sits within procurement or marketing in an organization's internal structure, it varies by organization. "It depends on where the expertise lies within the organization," said Scott. "But number one—what's most important—is if you have real meeting professionals leading the meetings function. Where they sit is secondary to that."

The primary audience being served by an event is a secondary determining factor.

"If the biggest chunk of meetings and events are externally facing, marketing is probably the best place, because it's about the content, the message, the brand, and integration in the mar/tech stack," said Scott. "Events are truly the highest touch point and most impactful—and often the biggest—marketing spend most organizations have. For those reasons, marketing is a great place for it."

Appropriately determining measures of success in KPIs and understanding the strategic business and sales cycle of your organization are also critical, but "none of it matters if it is not aligned



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and measured," Scott added. "Even an internally focused event, which is probably a learning and development program, needs to be on brand and have the expected outcomes well defined. If you don't understand the why and how you are going to determine if you are successful, it's all for naught."

NEW ROLES, NEW CHALLENGES AND NEW SKILLS

Changes in meetings management since the onset of the pandemic have forced planners and other team members to learn new skills and/or upgrade existing skill sets.



Top of the list, according to Scholar, is for meeting planners to understand the array of new technologies required to hold effective virtual and hybrid meetings. "People are digital, visual, impatient and they want mobile," she said. "So, when we think about our technologies and how we create our meetings in the future, we need to consider how to bring that mindset to our meetings as well."

A how-to primer on hybrid meetings might be in order. "I've been doing virtual meetings for many years," Scholar said, "but what I'm realizing is that a lot of meeting planners don't understand how to deliver a hybrid meeting, or what the difference is between the webcast company, the production



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company, and the AV company.” While services and definitions vary, webcasting companies typically provide an online platform to promote, register attendees and deliver live or on demand streaming of webinars. AV companies manage audio and video of live events. Organizers often partner with event production companies to provide whatever assistance is needed for increasingly complex digital deliverables online, in-person and/or hybrid events.

planners to hone their project management skills. “In the past planners might only have been delivering webinars and in-person events, now we are baking all of those things into some of our events,” Andrews said. “That requires a lot more organization and communication across the board, making it even more complex.”

Scholar noted that a lot of the skills associated with the more complex collaboration, formats and content creation now required of planners, “have had to be learned. Project management is critical, because turning strategy into operations requires deep project management skills, as well as understanding the multi-channel engagements needed to fulfill an omni-channel strategy. For example, videos or meetings with recordings can be reused in a simulcast the following week in different countries. A lot of those terminologies and skills have had to be learned.”

MORE EMPHASIS ON POLISHING BASIC SKILLS AND CONTINGENCY PLANNING

While up-leveling team members from a project management perspective is important, “we’ve also seen the need to relearn everyday skills,” Lust said.

“Stakeholder engagement, creative thinking, and problem-solving are standard everyday skills in meetings management that we had to somewhat relearn during this time period to put the right levels of focus and control in place from a day-to-day operations perspective.”

Since the onset of the pandemic, constant change has mandated additional stakeholder communication and management of expectations, she added. “Every day there has been something new, or something we needed to find a solution for from an operational standpoint.”

Scott noted that having the skills to do contin-



PROJECT MANAGEMENT IS A CRITICAL COMPETENCY

Many planners might also need to upgrade their project management skills.

“Event professionals are really project managers,” Andrews pointed out. “This has been my mantra for a while now. Project management is a core competency in my opinion and if you have the opportunity to learn more about it, maybe take some classes on it, it’s something that really helps drive your meetings programs.”

The increased levels of cross-collaboration across organizational teams is one factor driving the need for planners to enhance their PM skills.

“I think we work with more groups at the company than any other department, maybe outside of travel,” Andrews said. “We have to manage all of those people working across departments while also driving KPIs and driving deliverables. We have to manage timelines, communication strategy and expectations, while also doing the event execution, setting up the logistics and the event design. And while we are crafting these experiences we are managing against really tight timelines for these complex programs and even for smaller events.”

New formats, and more complex campaigns and content creation, are also driving the need for



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gency planning within your organization or with external partners has also become increasingly critical over the last two years. "You've got to have contingency plans in place so you are able to switch on a dime in case you need to go from live to virtual or hybrid," she said. "Being able to do a quick turnaround is essential, and that takes dedicated resources and chunks of time."

It's also a compelling reason why planners need to identify internal subject matter experts and create content well ahead of time, not at the last minute.

"The days where you could create a slide deck the night before an event are gone," Scott said. "Good content creation takes time—you just can't do it on the fly anymore in a virtual or hybrid space. It takes time to find internal subject matter experts and other content resources, and then share them with your internal teams and any external resources you are using. That means you really have to re-educate your speakers and key stakeholders and push the timelines to get everybody onboard."

For a multitude of practical reasons, that 'plan ahead' strategy is proving difficult for many planners to adopt.

"We are seeing a lot of short-term planning, whether it's face to face or virtual," said Lust. "There may be a misconception that with virtual you can just turn on a webinar tomorrow. It doesn't necessarily work that way because of all the preparation needed in addition to what would be a face-to-face meeting. We are starting to see longer lead times for those bigger functions that are further out that organizations are trying to get back on the books, but there is still a lot of short-term demand."

LOOKING AHEAD

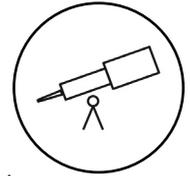
A [recent article](#) by Joseph B. Fuller, co-founder of Harvard's [Managing the Future of Work project](#), noted that the Covid-19 pandemic has jolted the foundation of a workplace model that had been relatively unchanged since the late 1920s, moving into the mainstream emerging trends toward workplace flexibility, 'work from anywhere,' and virtual meetings.

"It's the Next Normal we're headed to, not back to normal," said Fuller, "and that, for a lot of companies, is going to feature changes in work practices, changes in employee expectations of their employer, and companies learning from this duress about what they can do to be more effective and efficient and attractive employers."

Meetings and travel professionals anticipate that between 50% and 70% of meetings volume will return by the end of 2022, with full pre-pandemic events volume expected in 2023, according to proprietary BCD research.

"Although the activity levels may be the same, the meeting mix of what will come back in 2023 will look very different," said BCD's Lust. "Considering we have been in a virtual space for so long, organizations are re-evaluating what potentially fits in what bucket, what is warranted to come back face-to-face and what's more suitable to a hybrid environment."

When face-to-face does return, she added, it's important for planners to remember what worked in the virtual space and then carefully consider what content will work best for in-person events in the changed workplace and business environments "instead of reverting back to the same old thing that we've done before."





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While acknowledging that the long-term impact of the pandemic on work patterns and practices is far from certain, a Forbes article on the [future of work post-Covid noted that](#), “One outcome seems highly likely: there will be more disruptions and a greater need for reskilling than there was before Covid-19.”

Planners have already been grappling with disruptions, reskilling and upskilling since early

2020. “Our total events program framework has shifted, so naturally our roles have shifted as well,” noted Andrews. “We’ve been incredibly agile this whole time and our roles have literally changed daily, so agility is the word we keep telling each other on the events team over here.”

And that makes agility the best personal superpower meeting planners can cultivate in 2022 and beyond. ●

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About CVENT, Inc.

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Cvent Holding Corp. (Nasdaq: CVT), 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, please visit [Cvent.com](#).

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