

# Strategic Meetings Management + Marketing:

GETTING ALL THE PIECES TO ALIGN



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While strategic meetings management programs typically roll out in corporations to improve procurement and savings, often they operate outside marketing. A recent study conducted by Cvent on SMM program and marketing best practices found that while 80 percent of travel managers/SMM program leaders said it’s “very valuable” to collaborate with marketing, less than 50 percent said they often work with marketing. A closer look at the goals of SMM and marketing can reveal more commonality than differences. Whether such teams should operate under the same umbrella, or simply align processes and practices, there are benefits to gain, as highlighted in this white paper. But stakeholders must understand the goals, language and overall objectives of both functions.



Hear meeting and event and marketing professionals discuss ways that SMM and Marketing should align on a webinar accessible through Sept. 18, 2020, at <http://bit.ly/SMMandMarketing>.

### Why SMM is Important

**It adds value to the business.** An SMM Program, designed with several business leaders, will impact the company’s goals of improved revenue, education, motivation and communication. Driving factors are often cost savings, leveraging spending, visibility to total spend, risk mitigation, consistency and efficiency. The face-to-face channel is a critical component to a multi-pronged marketing strategy, which also may include webinars, social media, advertising, training, etc.

**It increases the value for meeting stakeholders and participants.** These are two key performance indicators to measure a meeting’s impact, sometimes known as the return on investment (ROI), return on objective (ROO), or return on engagement (ROE). An SMM program can measure and report on all these drivers consistently across meeting types. When SMM works to increase registrations and attendance at events, that works to reduce the marketing cost per attendee ratios.

**It improves service and operations.** There is significant duplication of effort across meeting types, divisions and regions. Successful meetings management streamlines workflows and prioritizes the end-user experience.

**It generates savings and reinvestment opportunities.** Even a rudimentary SMM process can reduce costs by as much as 20 percent. Many companies calculate savings as a reduction to bottom-line budgets while some reinvest or optimize spend.

**It allows planner stakeholders to focus on content.** Delivering a quality meeting with the right branding and content in the right environment and without distractions from mishandled or arduous logistics contributes to individual meeting ROI. A fully established meetings management program may also integrate with training, HR and customer relationship management initiatives to track longer-term outcomes for meetings ROI.

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50%

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**It helps reduce overall risk to the organization.**

Meetings management will reduce risk exposure in five areas.

- 1. Contractual/legal/regulatory:** Meetings management provides the pre-event visibility needed to ensure compliance.
- 2. Financial:** Use results-based financial data on meetings and events spend, volume and impact to drive decisions on the company’s omnichannel and multichannel goals.
- 3. Business operations:** Develop efficient and cost-effective operational plans to support meetings, conferences and events.
- 4. Reputational:** Ensure integrity- based sourcing and planning for meetings and events to avoid poor public perception.
- 5. Market:** Ensure that participant experiences are exceptional and the time spent was valuable to them and aligned with corporate goals, mission and vision.

**Why Marketing Should Be Part of SMM**

**What’s in it for marketing:** A marketing team is interested in more touch points and interactions to drive messaging, leads, revenue and customer satisfaction. SMM programs can help via standardized processes and automation, workflow and visibility, efficiency, negotiating venue contracts, payments and budget reconciliation, virtual meetings, innovative apps and, most important, showing the return on engagement—particularly in the area of face-to-face events.

“Event success is defined by ROMI or the return on marketing investment,” said Kimberly Scott, senior regional marketing manager for Illumina, on a recent BTN Group webinar sponsored by Cvent. “That is how your marketing colleagues will measure their success.” A 2018 Oxford Economics and Events Industry Council study, she added, found that \$325 billion in direct spend on meetings in the United States generated \$845 billion in sales. “To a marketer, those events generated 2.6 times ROMI—which is a really great number.”

Meetings terms might need to be converted to marketing terms. “When we led with SMM and sourcing, the marketing team wouldn’t even talk to us,” said Amanda Young, Global Event Operations—Strategy Leader, General Electric. “But when we led with the end result—how this would help them achieve their objectives, they paid attention.”

Marketing and SMM goals are “really all about helping a business achieve it’s goals,” said Julie Haddix, director of Enterprise Marketing for Cvent. Key is learning how to translate those terms into the language or metrics that all understand. And, added Scott, it is critical that teams define terms across all stakeholders in an organization. “Definitions are really important as how each department or individual defines terms can be very different.”

According to Kari Wendel, vice president, Strategic Customer Organization, CWT Meetings & Events, marketing historically pushed back harder as procurement got more involved. Recently, “I’m definitely seeing across our client base that marketing events—and the marketing departments—are seeing the value,” she said. “SMM

“When marketing becomes a true constituent in an SMM program, the bar moves higher for service excellence and for more advanced meeting professionals to really meet the needs of those marketing teams,” says Kari Wendell, of CWT Meetings and Events.

programs have generated a good internal track record and high credibility. I’ve seen marketing departments come voluntarily to the discussion, saying, ‘Okay, there are whole lot of pieces, transactionally and logistically, of our meetings that we would love to not have to do so we can focus more on content and the right delivery.’”

**What’s in it for planning departments:** From product launches and large sales meetings to regional training sessions, marketing divisions hold both high- and low-profile meetings. Higher-profile events may be fully or partially outsourced to third parties and may be among the best managed meetings in the company. In addition to looking for ways to leverage meetings spend with these events, planning departments can review their planning processes policies for best practices. “When marketing becomes a true constituent in an SMM program, the bar moves higher for service excellence and for more advanced meeting professionals to really meet the needs of those marketing teams,” says Wendell. Acknowledging what each has to offer the other will ease SMM buy-in for these two teams or departments.

That has been the case at Autodesk, according to Gigi Gleason, senior manager, Global Strategic Meetings, Workplace & Travel. The five-year SMM program journey started with small meetings. As the team, process and technology proved value to stakeholders, the responsibilities expanded to not only small and midsize meetings but regional customer events in North America, EMEA and APAC, 1,000-person user conferences, sales kickoffs and regional meetings, and incentive programs.

### The Value of Data

Autodesk’s SMM team worked hard to understand stakeholder needs for each meeting and create a reliable process that could scale. A project to identify the best locales to hold “premier meetings, to bring those events closer to customers,” Gleason said, required a deep dive on all customer and meeting data over two years.

Meetings management technology creates a central data repository for meetings activities that not only standardizes work-flow, but gathers data useful to both marketing and planning departments. Tech providers are working on end-to-end solutions that can accommodate both simple, self-service meetings and ultra large and complex user conferences and citywide conventions. These planning tools and apps enhance and extend the participant experience to span the pre-event, on-site and post-event periods.

Newer meeting technology tools, whether for mobile, onsite attendee management or other data capture tools, provide event managers with the ability to analyze and strategize based on that data, according to consultants and event managers. Event managers today are using data to inform decisions on food and beverage, agendas and break/meal times and amounts, and room layouts like never before. Beyond basic lead retrieval, sophisticated technology can provide marketers and SMM with precise details on attendee movement within a conference or exhibition and provide valuable insights to help justify changes for future events, better leverage on new contracts and build the ROI, ROE or ROMI of your event.

Data from mobile apps has grown in importance, especially regarding attendee engagement and direct, real-time feedback. Some companies integrate meetings

tools, particularly meetings apps, with customer relationship management tools to track follow-up from client-facing events and longer-term business opportunities and conversions to better quantify ROI. Increasingly, meeting tech is also integrated with leading marketing platforms so data can seamlessly flow without manual entries.

Virtual/digital technology options such as webinars, real-time and perpetual-collaboration technologies that fit into today's virtual and hybrid meeting delivery approach are other sources of attendee engagement that can generate useful data. "A couple of years ago, I did a study with a financial services client, using a [mobile] meetings app," noted Debi Scholar, SMM coach and global category lead-travel, for Teva Pharmaceuticals.

"Over the course of several months, we were able to identify the clients who participated in one meeting or multiple meetings, who downloaded available presentations, etc. What we found was that [the ones who participated more] actually produced more revenue for the company. That's the type of data that we want to get," Scholar said. "You want to bring all your marketing tools together. You can find out when were they in the room, when were they on a virtual meeting, whatever delivery method we choose, how are they getting the content, how many meetings did they go to or shows did they go to. Then, how can you use that data to show if they attended once, if they attended twice, if they attended three times; how much did they interact within the meeting app; how many documents did they download. Then, as a result, did they actually buy something? That really shows not only the return on investment but also return on engagement."

#### Common marketing questions companies want to answer with data:

- 1. Sales or Revenue generation:** Did you sell more as a result of that event? Did the attendees who were more engaged at the event buy more from a company?
- 2. Lead generation:** How many new leads were produced? How many existing leads were nurtured along a sales path? How much did it cost to acquire or nurture those leads?
- 3. Raising brand awareness:** Was the brand effective in building brand perception? "You can start to look at analytics around social media and around Instagram posts related to your brand, around activation and [if they] actually shared it on social media with followers."
- 4. Attendee Engagement and/or Satisfaction:** How engaged were attendees in attending sessions, meeting with partners or attending events? How satisfied are they, from survey results, Net Promoter Scores or other metrics your team deems are best to identify desired objectives?
- 5. Learning:** Did attendees learn what we were trying to teach them? You can determine this by "scoring them, testing them, checking their knowledge."
- 6. Networking:** Did people connect at the event? "How many LinkedIn connections were made from people in that room? Did people make connections that led to new business?"

## Conclusion and Next Steps

Determining whether or not to merge, or just more closely align marketing and SMM is a decision best informed by a detailed assessment of the benefits to one's organization. But perhaps the two most important reasons are:

1. An SMM program will take over many of the logistical, contractual, risk mitigation and duty of care responsibilities of planning and event, thus giving marketing stakeholders more time to focus on creating compelling content and branding experiences.
2. Data generated from SMM processes and technology can greatly enrich marketing databases and help to lower marketing costs per registrant or attendee.
3. New technologies and apps are making it possible to measure the experiential return on investment, return on engagement and return on objective of marketing events.

Data that can be aggregated when SMM and marketing are aligned could include:

**Pre Event:** Audience segmentation, registration status/data, surveys, custom questions and session enrollment

**During Event:** Check-in, session attendance, session feedback, poll responses, social posts, speaker ratings, session ratings, booth visits, trade show scans, product demos, one-to-one appointments and activations

**Post Event:** attendee satisfaction scores, survey responses, attendee engagement from campaign opens/clicks/views/form fills, event ROI/ROO/ROE, event costs, event revenue

Data and anecdotal insights clearly point to the advantages of closer relationships between marketing and SMM to better meet the goals of all stakeholders.

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