

**Speaker Nikki McLain, CMP, SMMC provides a checklist of do's and don'ts of starting SMM (Strategic Meetings Management), referencing the SMM Wheel. Part 1 addresses Strategy, Policy and Registration**

**Part 1 of 3:**

CWT Meetings & Events has created a quick and easy checklist to help better understand the “dos” and “don'ts” for beginning or advancing an SMM program.



The SMM framework outlined here provides a practical approach for setting the foundation via strategy and policy, then integrating other key components at each stage of the process, from registration to reporting and technology. This month we'll start with three areas to focus on – Strategy, Policy and Registration. Next month we'll continue with the next three items on the checklist and finish up the rest of the list in the December issue.

**Strategy**

- ✓ **Do** define size and type of gatherings the organization is interested in tracking and managing.
  - Examples include but are not limited to: sales meetings, staff meetings, management meetings, trainings, education events, trade shows, conventions, congresses, and incentive and recognition programs.
- ✓ **Do** start gathering data on current and future M&E spend by having all meetings begin registering through a central person or system.
  - If you don't have a tool yet, just start tracking in an excel spreadsheet
- ✓ **Do** ensure the SMM strategy aligns with and supports overall organizational goals and objectives, and adjust accordingly when priorities change.
  - For example if a company's goal is to increase productivity or reduce costs, this is a great parallel to strategic meeting management
  - If you don't know your company or client's goals and objectives - just ask!
- × **Don't** waste time and energy gathering data on past M&E spend – start now and move forward

**Policy**

- ✓ **Do** clearly communicate guidelines and resources to planners and attendees, including types of meetings and events that must follow the process vs. those that can be managed individually.
- ✓ **Do** benchmark the M&E policy against that of peer organizations and/or other internal policies, such as corporate travel.
- × **Don't** assume a non-mandated policy is ineffective. While corporate culture may not support mandating, SMM professionals can still ensure high levels of compliance by creating logical and beneficial processes, and by communicating rationale and ongoing progress internally.

**Registration**

- ✓ **Do** ensure stakeholders understand what to expect once they have successfully completed the registration process.
  - Ensure your stakeholders understand why you're asking them to register their meeting and how they register it
- × **Don't** create a registration process that is so lengthy or cumbersome that users get confused or frustrated – Keep it simple

- × **Don't** set the process up for failure by neglecting to forecast and appropriately resource for the number of meetings that will use the registration process/system

**As we continue down the check list, the next 3 important pieces of the SMM Wheel are Approval, Sourcing/Procurement and Planning/Execution.**

**Part 2 of 3:**

**Approval**

- ✓ **Do** identify whether an approval process is required for a meeting to occur.
- ✓ **Do** train all stakeholders involved in the approval process so they understand their role in the process.
- × **Don't** let approvals stall with busy executives. Instead, ensure approvers understand the time allowed to respond, and the escalation process if responses are not received.

**Sourcing/Procurement**

- ✓ **Do** provide every meeting with a unique identification code which all expenses will be associated (i.e. Client Name – 12345 or name of meeting)
- ✓ **Do** understand that different types of meetings and events require different approaches to purchasing. It's not a one-size fits all solution!
- ✓ **Do** look at incorporating an electronic RFP into your sourcing process. It will likely save time vs. making phone calls, tracking a manual list of responses etc.
- × **Don't** assume preferred vendors for other areas of the organization, including corporate travel, are equally appropriate for the meetings & events program. Sometimes the best transient hotels are not good meeting hotels and vice versa.
- × **Don't** assume you can send all company meetings to the same hotels/venues. Try to understand the goals and objectives of each meeting and what will best fit those meetings' needs.

**Planning/Execution**

- ✓ **Do** evaluate the experience and skill set of those currently planning meetings of all sizes. Some may lack formal training but have a wealth of experience, and vice versa. With the right management, each can be made a valuable asset to the program while still ensuring compliance to SMM policies and procedures.
- × **Don't** allow the SMM program to add a significant amount of workload to planners' already busy lives. While there may be an initial increase in work as the program is implemented, SMM should ultimately make M&E planning more efficient and effective.

KBC MPI Members, as we finish out the third and final month of the SMM Checklist series, I hope you have enjoyed learning a bit more about Strategic Meetings Management and how it can potentially help your organization save money. The last three areas of the SMM wheel to consider are payment/expense reconciliation, data analysis and reporting and technology.

**Part 3 of 3:**

**Payment/Expense Reconciliation**

- ✓ **Do** implement solutions that improve visibility into M&E spend and simplify or streamline processes for meeting planners.
- × **Don't** be limited to only those technologies the company already uses for other payment and expense processes. There may be other options more suited to the unique nature of M&E.

**Data Analysis/Reporting**

- ✓ **Do** demonstrate the SMM program's value through regular reports that demonstrate progress in terms of savings, planner and attendee satisfaction, etc.
- × **Don't** simply pass along reports as they are generated from systems. Instead, look for the overall story the data is telling regarding progress and additional opportunities, and share that information. Think about how the data can be used to encourage further buy-in and participation throughout the organization.

**Technology**

✓ **Do** establish goals and objectives for how technology will enable improvement in the M&E program, and make those central as available M&E technology is researched and considered.

✓ **Do** discuss technology with peers who have already implemented it to learn about the successes and challenges they experienced.

× **Don't** purchase technology and then retrofit SMM policies and processes to the tool.

× **Don't** assume technology will automatically or easily solve problems in the SMM program.

Technology is only one piece of the SMM puzzle.

My biggest piece of advice is to start thinking about your meetings and travel programs as a whole. Don't simply think about one meeting, or a few meetings, think big picture and consider the holistic view of what your company's current state might look like.

Meetings happen every day at every company and can account for as much as 35-60% of a company's travel spend. That's a significant amount of money to ignore. Consider taking small steps towards SMM and implementing one of the strategies I've discussed in this checklist to help start saving your company money.

*CWT Meetings & Events is a contributor to GBTA's and MPI's recommended SMM framework, and subscribes to each component as best practice in guiding an organization's efforts today. These recommendations align with that model.*