

Three Easy Steps to Get Started with Cvent

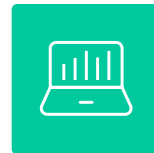


Setting up a meetings management program doesn't have to be complicated. Achieve your meetings goals with **3 simple steps:**



Step 1

Capture Meeting
Activity



Step 2

Automate Sourcing
and Budgeting



Step 3

Mitigate Risk and
Increase Efficiency

Cvent will arm you with a strategic roll out plan, sample communication plan, training, and a consultative representative to ensure adoption of your simple meetings program.

Step 1: Capture Meeting Activity

The first step in any meetings management program is to **capture meeting activity**. With Cvent, this can be done quickly through a meeting request form and centralized master calendar. When a meeting request is submitted, it automatically appears on the calendar, providing insight into when, where, and what meetings are happening at your organization. Combined with detailed reports on meeting request information, Step 1 provides you with the insight you need to better understand and track meetings.



Meeting Registration Form: Visibility into Meeting Data

- Brand a pre-configured form, maintaining your company's look and feel
- Capture standardized information such as requester, meeting type, logistics, services requested, and a high level budget estimate



Meetings Calendar: Centralization of Meetings Calendar

- Populate registered meetings and events automatically
- Allow users to filter calendar view based on their needs such as meeting type, region, or department



Data Reporting: Analysis of Meeting Activity

- Gain deeper insight into meeting request details
- Filter reports to the regional, department or division level
- Share meeting data with Senior Management and others without Cvent access



Step 2: Automate Sourcing & Budgeting Process

The second step in implementing meetings management technology is to automate your sourcing and budget processes. Use one of four venue search and booking tools at your disposal to get preferred supplier tracking and utilization. Access sourcing technology to compare venue rates and get the best deal then use budget templates to start capturing information on meeting spend and savings. Step 2 allows you to take your meeting analysis to the next level.



Cvent Supplier Network: Sourcing Strategy

Option 1: Cvent Supplier Network

Option 2: Instant Book

Option 3: Bookings Portals

Option 4: Cvent Kapow



Budget Tool: Insight into Meetings Spend

- Capture key financial information in a consistent format
- Categorize costs within standard budget categories
- Estimate savings by comparing Budgeted, First Offer, Negotiated, and Actual Costs
- Report on budget specifics, including Vendor Spend





Step 3: Mitigate Risk and Increase Efficiency

The last step gives you the opportunity to automate additional processes and add accountability tracking to your meetings program. Steps 1 and 2 allow you to capture baseline data reflecting the meeting activity within the organization. Step 3, automates key meeting management processes to track the stages of your meeting lifecycle. This allows you to not only track how many total meetings occurred, but also identify peak planning times and understand how long a meeting spends in the various steps along the way. Adding additional functionality and customization to your sourcing and budgeting processes will take your meetings program to the next level.



Workflow Management: Accountability Tracking

- Create Meeting Request Form Statuses to monitor progress
- Assign a Planner, Approver and other resources to a meeting and link them to the Requester with automated emails to open lines of communication throughout the planning process
- Use Event Planning Statuses to move meetings through their lifecycle and keep information organized



Sourcing Strategy & Analytics: Analyze your Sourcing to Gain Savings

- Breakdown total sourcing by vendor and hotel chain
- Create preferred relationships with properties that provide discounts or ancillary benefits such as free shuttle, Internet, upgrades, etc.
- Collect notes from planners to improve employee experiences
- Utilize cancellation credits with a cancelled inventory



Budget Management & Reporting: Tracking Spend and Savings

- Apply your corporate finance terminology by customizing key budget fields
- Refine savings formulas and expand budgeting granularity by use of budget subcategories



Holistic Data Analysis: Visibility into Meetings Activity

- Leverage resource assignments to report on workload distribution and project accountability
- Track company spend/savings to the subcategory level: drill down by applying key field filters such as department, region, or meeting type

Take the complexity out of Meetings Management.
Meetings Management Simplified.



For most organizations, this is all you need to have a successful meetings program.

For more information on simplifying your meetings, contact us today!

www.cvent.com | 703.226.3567