

Meetings Management



Our Cvent Meetings Management solution helps you streamline, automate, and enhance processes within your meetings program to provide end-to-end visibility into all organizational events and meetings. We enable the tracking of all meeting processes, spend, volume, standards, suppliers, and data. Features are dependent on license (Professional or Enterprise) and can be purchased a la carte.

Professional License

Meeting Request Forms

Capture information about all meetings happening within your organization through customized, branded forms.

bluecorp
MEETING REQUEST FORM

- You must wait 15 minutes after 40 minutes of inactivity
- Please complete all required fields (marked with an asterisk *)
- You will receive a confirmation email with ALL submitted details immediately after submitting
- If you have questions regarding this process, please contact the [Event Services Team](#)

Requester Information

* Requester First Name
Adam

* Requester Last Name
Kernerman

* Requester Email Address
kernerman@gmail.com

* Requester Mobile Phone
Please enter your mobile number
1773-394-4299

* Business Unit
Sales

Event Details

Meetings Management Reports

Maintain a central repository for all meeting and event data to quickly access and generate real-time reports, such as spending and savings analysis, meeting activity, turnaround time, and audit history reports.

Workflow Components

Assign roles to individuals to control visibility and access settings within a meeting request. Use statuses to keep track of the different phases of the event lifecycle.

Implementation Consulting Hours

Our Professional Services team will develop an implementation plan, execute against the plan, and monitor progress through regular update calls to ensure key milestones are met.

Enterprise License

This license includes all features of the Professional license plus the following:

Automated Approval

Automate the event lifecycle from the meeting request to completion and reconciliation. Use triggers and policies and ensure the event follows your standards. Measure lead and turnaround time between meeting request and each event status.

Dashboard Reporting

Measure the success of your meetings program and easily view account data such as spend per chain, lead time, and monthly activity in various graph formats.

Custom Workflow and Training

Our Professional Services team will review your meeting process, identify improvements, provide a Visio diagram of your workflow, and help configure it. Receive custom training and user guides throughout implementation.

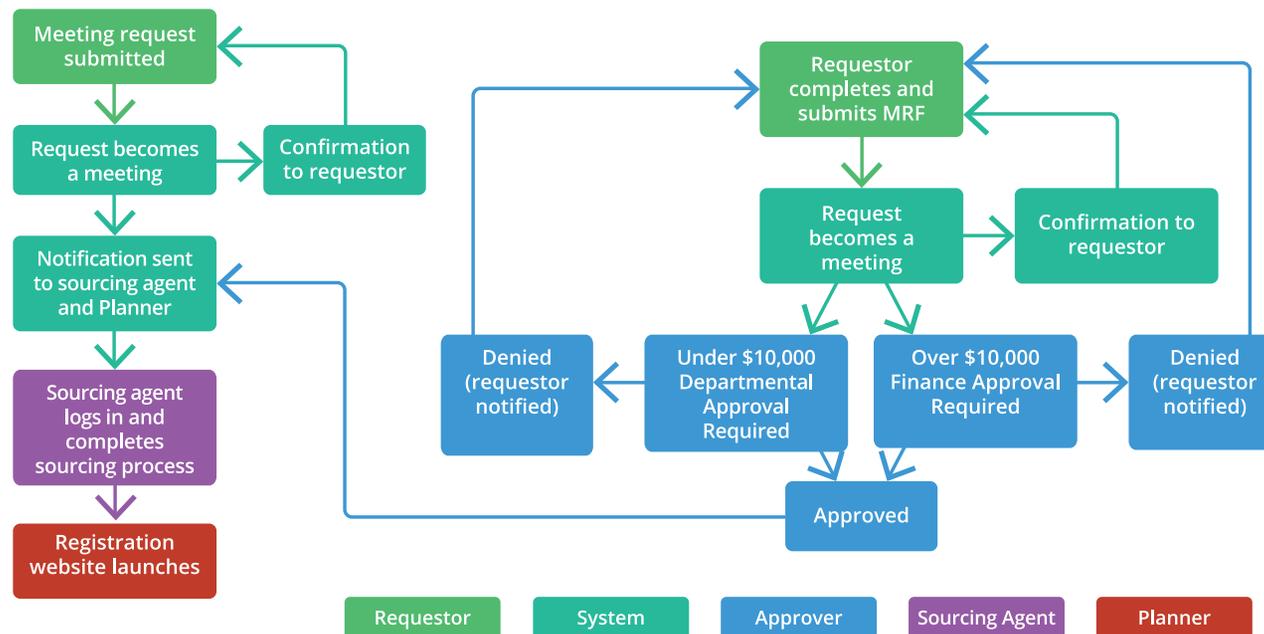
Process Forms

Create a custom form to collect additional data associated with an event, such as a group air or travel requirement form. Send a notification once the form is complete to notify a specific individual and access the details.

Budget Module

Track costs per event, across events, per vendor, and more. Get more visibility into cost savings and event ROI. Leverage this data to negotiate better deals with suppliers.

Allocate costs to business units, cost centers, participants, and more for in-depth reporting and analysis of meeting spend. Configure policies to manage budget entry and understand spending behaviors. Compare different event options per city or venue to make the most cost-effective decision for your event using different budget versions.

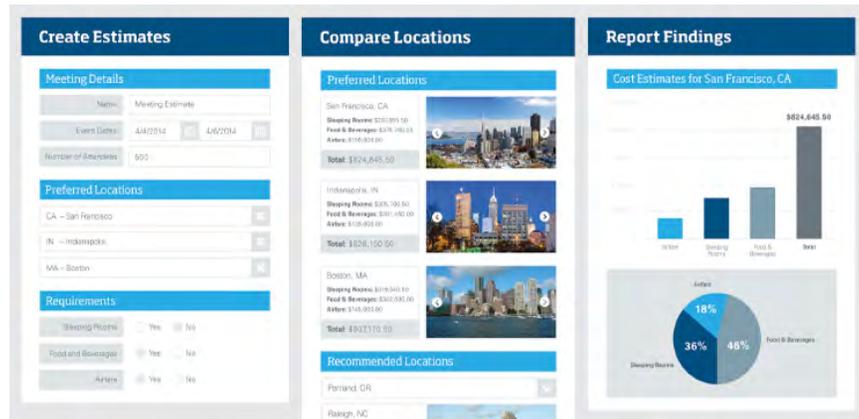


A La Carte Add-Ons

Add-on modules can be purchased for either license:

Meeting Estimator

Calculate the estimated cost of a meeting, including airfare, food and beverage, and sleeping rooms for meetings in top Major Metropolitan Areas (MMAs). Get insight into the most cost-effective destinations for your meeting to help streamline sourcing and guide your meeting planning process.



Expense Integration

Reconcile meeting expenses by having all data under one roof. Pair actuals to measure and control the true total cost of meetings. Eliminate double entry of expense data and track expenses incurred by employees.

Branding Package

Maintain consistency and brand every aspect of your event registration using a branded URL, custom footer, and custom templates for your event websites.

HCP Reporting

Generate a one-click spend-per-participant report that includes all HCP fields necessary to comply with federal regulatory reporting requirements. Allocate budget items to appropriate business units or categories.

Resource Management

Define the types of resources your organization manages, maintain an inventory of those resources, and reserve them for activities within Cvent.

Single Sign-On

By acting as a central "identity provider," single sign-on allows users to leverage their existing internal network login information to securely access Cvent.

HTTP Post

Assuming people have a secure log-in on client's site, post individual's contact information directly into Cvent registration form.

Travel Integrations

Save time by automating the matching of passenger flight information with meeting and event registrants via Concur Travel, GetThere, and GDSs (Sabre, Worldspan, Amadeus, Galileo, Apollo).

Cvent Integrates with virtually any other system

API to push and pull registration, contact, and event data via XML web service calls



Meetings Management License Features

Event Planning Stage / Feature	Professional License	Enterprise License	Description
Planning			
Event Planning Statuses	✓	✓	Track activity progress and see how far along your event is in its lifecycle.
Internal Planning Calendar (not external-facing)	✓	✓	Use an internal calendar to organize upcoming events and help your team navigate the event schedule.
External Event Calendar		✓	Embed a calendar on your organization's website that automatically updates with the events you create in Cvent, so that web visitors can easily register for the events that fit their schedule.
Meeting Request Form	1	Unlimited	Collect and centrally store important data from your internal stakeholders about upcoming meetings requests, kicking off the approval and notification process for each meeting/event.
Process Forms		✓	Give your internal teams an online form to suggest automated processes that improve the efficiency of your meetings and events program.
Workflow Components			
Meeting Planning Statuses	✓	✓	Build out your meeting lifecycle with custom meeting request statuses which encompass each phase a meeting moves through.
Event Roles	✓	✓	Assign custom event roles to your team and enable personal notifications based on their respective responsibilities.
Notifications	15	Unlimited	Receive progress notifications via email as your team works through the event lifecycle.
Policies		✓	Set up policies that prevent your team members from completing tasks out of order and risking disruption to your meeting planning process.
Triggers		✓	Queue up notifications that automatically alert appropriate team members when specific conditions in your event lifecycle are met, reducing the need for manual adjusting and updating.
Automated Approval		✓	Automatically route approval notifications to appropriate team members based on pre-approved responses that you designate.
Budgeting			
Budget Module	Additional Cost	✓	Monitor event-related expenses, organize spending, and track savings across an individual meeting or your entire meeting and events program.

Meetings Management License Features (cont.)

Event Planning Stage / Feature	Professional License	Enterprise License	Description
Budgeting (cont.)			
General Ledger Codes	Additional Cost	✓	Help your accounting department track revenue in their general ledger by running reports and tagging fees with specific general ledger codes.
Budget Policies	Additional Cost	✓	Put policies in place that prevent your team from submitting costs which exceed your total event budget.
Budget Allocation	Additional Cost	✓	Allocate your expenses into categories and subcategories, with designated limits for each.
Budget Versioning	Additional Cost	✓	Prepare for any scenario by creating multiple versions of your event budget based on different factors like location, venue, etc.
Spend per Participant (HCP) Tracking	Additional Cost	Additional Cost	Track spend per participant (meals, travel, etc.) across your meetings and then evaluate all that data in a one-click report.
Reporting			
Strategic Meetings Management (SMM) / Budget Cross Event Reports	✓	✓	Track meetings, RFP's, registrations, and spend across all of your meetings and events by using our robust cross event reporting tool.
Turnaround Time Reports		✓	Evaluate the efficiency of your meetings and events program by tracking how many days it takes for a meeting to move from status A to status B.
Dashboard Views of Data		✓	Design dashboards for your meeting and budget data, then share them with your team in a portal or regular email cadences.
Implementation			
Consulting Hours	**	**	** <i>Available for scope and purchase:</i> Work with a Cvent implementation consultant to learn your business needs and help build the form/workflow of your event.
Workflow Analysis and Design		✓	Receive a Visio diagram that walks you through each step of your custom event workflow.
Customized Strategic Meetings Management (SMM) Training and Step-by-Step Guides		✓	Gain access to hands-on training to understand how your SMM program is implemented using Cvent technology.