



MEETING PROFESSIONALS INTERNATIONAL

Platinum Series Program

Strategic Meetings Management

MPI Kansas City Chapter
Professional Education Conference
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This program is an extension of a series of Position Papers developed by MPI's Global Corporate Circle of Excellence. www.mpiweb.org/village/ccoe/ccoe.asp

Program Objectives

At the conclusion of this presentation, you will be able to:

Identify the eight steps needed to implement a strategic meetings management program.

Develop an action plan to implement the eight steps.

8 Steps to Create a Strategic Meeting Management Program

- 1) Understand Organization's Strategies and Goals**
- 2) Identify Department Core Competencies**
- 3) Draft a Preliminary Plan and Validate**
- 4) Identify External Partners**
- 5) Identify Technology Tools**
- 6) Define Your Success Metrics**
- 7) Final Proposal – Business Plan**
- 8) Refine Plan for Implementation**

TABLETOP/GROUP DISCUSSION:

What is strategy?

What does being strategic require you to do?

Step 1 – Understand Organization Strategies and Goals

Understanding your organization’s goals and objectives is crucial. A strategic plan needs to have a direct link to organization goals and objectives.

Strategy Requires Having a Vision

MPI Vision: Meeting Professional International will be the pivotal force in positioning meetings and events as strategic components of organizational success

What is your Strategic Meetings Management (SMM) vision?

Strategy Requires Having a Mission

MPI Mission: Meeting Professional International is the leading global association that defines and shapes the meetings and events profession.

What is your Strategic Meetings Management (SMM) mission statement?

Step 2 – Identify Core Competencies

Value is defined through the process, not through a specific program

Your Competencies	Department Competencies	Other Departments
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Identify potential internal partnerships

_____	_____	_____
_____	_____	_____

Step 3 – Draft Preliminary Plan and Validate

Simple and brief roadmap

- **Identify your world**
- **Identify how other departments can support the process**

Executive summary elements of a formal business plan or proposal

- **Mission statement**
- **Date business began**
- **Name of founders and the functions they perform**
- **Number of employees**
- **Location of business and any branches or subsidiaries**
- **Description of facilities/plant**
- **Products manufactured/services rendered**
- **Banking relationships and information regarding current investors**
- **Summary of company growth including financial or market highlights**
- **Summary of future plans**

Importance of plan

- **How does this fit into organization's overall objectives?**
- **Identify cost/time savings**

Why change everything seems to be working okay already? If you did nothing, what would happen?

Step 4 – Identify External Partners

Preferred vendor relationships are important

List possible external partners you would need to identify and work with under your strategic plan.

Hotels _____

Ground Transportation _____

Airlines _____

What strategic questions should you ask your external partners?

What strategic questions do you want your external partners to ask you?

Step 5 – Identify Technology Tools

Do not reinvent the wheel. During your initial and your ongoing research, learn what is available and what will work best for you.

What are you currently using?

Data collection _____

Reporting _____

Analysis _____

Reservations _____

Records _____

RFP's _____

Accounting _____

Other _____

What do you need?

Step 6 – Define Success Metrics

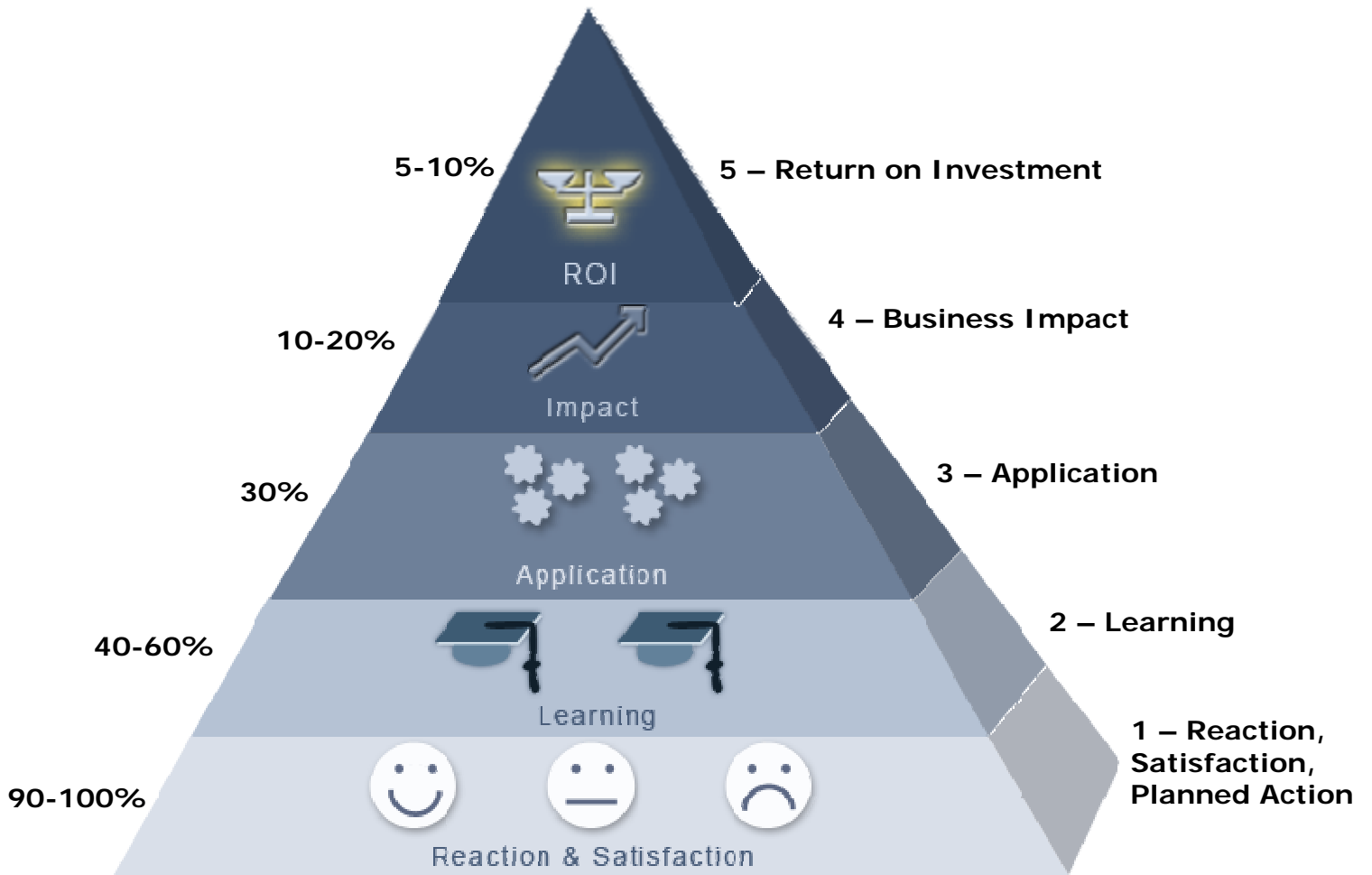
Individual meetings and events should have some form of evaluation and success measurement associated with them. If not, how can anyone determine if they have "added value" to their organization?

How do you currently measure success?

**Are your ROI measurements always the same or do they differ?
Why or why not?**

What do you do with your measurements? Who do you share them with and why?

5 Levels of ROI Measurement



Step 7 – Final Proposal – Business Plan

You need to review your business plan with internal partners, management and one or two trusted executive leaders before you present it. Make sure you practice, practice and practice your presentation before you give it to your executive leaders!

Know the different ways your executives may want you to present your plan.

Email	_____
PowerPoint	_____
In person	_____
Executive synopsis	_____
Full report	_____

What key factors do you think will cause your plan to be efficient and effective? What will cause your leaders to approve your plan?

_____	_____
_____	_____
_____	_____

What would cause your leaders to NOT approve your plan?

_____	_____
_____	_____

What risks are associated with your plan?

_____	_____
_____	_____
_____	_____

Step 8 – Refine for Implementation

After you have presented your plan, be ready to modify it based upon input from your leaders. Approval of the program is only the beginning!

- **Approval of the program is the beginning**

- **Utilize feedback / Manage expectations**
 - o **Other department**

 - o **Executive**

Strategic Meetings Management Action Plan

Developing an action plan is critical. Make a commitment to yourself and begin moving your Strategic Meeting Management plan forward. Write down the steps you can take to start heading in the right direction to elevate your position within your organization and ultimately, if you wish provide your organization with a business plan to create a Strategic Meetings Management program.

	Step	Business Goal	Personal Goal
30 Days			
60 Days			
90 Days			

GOOD LUCK!