



Integration and optimisation

The EY Global Travel & Meetings Team's journey towards a combined programme



GLOBAL BUSINESS TRAVEL

This study looks at how and why EY launched a project to converge its global transient travel and meetings programmes.

How things were: identifying the opportunities

Four years ago, we started a comprehensive review of meetings and events (M&E) activity across the business. We found a fragmented and disconnected landscape, with a lot of activities managed by individuals and different departments, operating independently of each other.

We saw that a key factor here was lack of visibility: significantly improving visibility on M&E activity would bring a wide range of benefits to the business, from savings and efficiencies to a better user experience for event owners and attendees.

Another challenge we found was risk in the contracting process, with a need for consistency in terms and conditions in our contracts.

In short, we saw an opportunity to raise M&E standards – including consistency, visibility, reporting and compliance – to match those of our global travel programme.

Defining a plan

The foundation for this project was to build a single policy for M&E, designed for global adoption, aligned with the travel policy and managed by a single travel and meetings (T&M) team.

To build a strategy for change, we needed to understand the events management picture, so we conducted a series of interviews with



our different stakeholders across the business – this also started engagement with these key groups.

To roll out the new programme, we planned a region-by-region phased implementation with a timeframe that allowed for learnings to be applied to following regions.





Change management challenges: bringing stakeholders on board

Having previously established a foundation of trust from senior leadership in the travel programme meant we had leadership support from the outset for this project.

A crucial part of successful engagement is crystal clear, regular messaging. We put a communications plan in place ahead of launch to let people know what was coming and to give them the opportunity to ask questions in advance.

Also key is using the right communications channels and tailored messaging. Our plan included regular alerts, newsletters to Executive Assistant (EA) communities, Skype lunch-and-learn sessions, the internal social media platform Yammer, and in-person meetings.

Illustrating the benefits of the programme, such as improved contracting processes and support, is also important: people have an emotional attachment to events they manage, so to mitigate pushback we made sure the messaging emphasised that we were not taking their events away, but empowering them to manage more effectively and efficiently.



Executive Assistant champions

Building strong relationships with EAs – who do a large volume of meetings bookings – was vital. Engaging with EAs was one of the valuable lessons learned from the global travel programme. We tapped into existing EA networks and engaged with them to understand their needs around M&E: what were their frustrations in the past, and what could we do to make their lives easier and ensure they would use the service?

EAs became an extension of our team and champions of the new programme – they help spread the message across their networks, updating on the new process, speaking on team calls and highlighting issues or gaps in service.



Joined-up venue sourcing

Visibility has changed how we look at venue sourcing. Once you have a better understanding of where and when your events take place, your negotiations become collective. Traditionally this was done on an event-by-event basis; now we can consolidate events in certain venues and locations to drive savings. We conduct negotiations across multiple events, and everyone in the organisation can take advantage of those rates. As a result we have become more consultative as a team, able to offer alternative locations and venues at lower cost.

A good starting point for optimising venue sourcing is looking at your transient travel hotel network to see where you can incorporate M&E. A joined-up programme can drive more successful relationships with all your travel and meetings suppliers, including the M&E technology platforms that support events organisers and attendees.

Duty of care

Duty of care was a key message we wanted to drive home when we hosted education sessions to bring everyone onboard. Put very simply: 'Our risk management team can only support you if we know your event is taking place.' New guidelines set out security procedures – a key part of this is compliance: driving people to register and book all events via our chosen events management platform, which captures data needed for risk management and can also be used to disseminate security messaging.



Working with TMCs

Make sure your Travel Management Company (TMC) is fully engaged from the outset. It's important to have a joined-up account management team with visibility across your combined spend to support supplier relationships. The TMC can provide data analysis of this spend, helping drive key benefits of a converged programme; for example, understanding your air spend helps you optimise volumes to drive group air agreements, and build a clear a picture of the total cost of events.

Another area is reducing hotel attrition: where big events can mean a significant quantity of hotel room cancellations, these can be matched with transient business travel requirements and 're-used'.





Supplier relations

Implementing a combined T&M programme also means ensuring that your suppliers are on board. Again, education and regular communications were key to supplier engagement, including:

- **Understanding the opportunities for suppliers to gain greater volumes of sales.**
- **The time and resource-saving benefits behind the new brand-wide contracts.**
- **Getting individual properties to understand EY's wider and global relationships with their brands.**
- **Both sides viewing our relationships as partnerships.**





Outcomes

We now have the combined programme in place, managed by a single T&M team, and we have implemented it across our key regions. As with any programme, adoption is still a work in progress, but we are already seeing massively positive outcomes.

As well as delivering major savings across the business, we are seeing a change in mindset and in the way the T&M team works with stakeholders. It now has a more consultative role. For example, looking holistically at where people are travelling from and to, rather than just focusing on the event taking place, means we can deliver much greater value and savings.

Part of the programme has been signing agreements with preferred technology providers, which has transformed the experience for meetings owners and attendees. Choosing the right attendee management and registration technology has reduced, streamlined and automated administrative work for organisers.

We negotiated master service agreements with hotel chains that reduced the time needed to contract for events. This was a key benefit for our service users, enabling a reduction in the time required for contracting from six weeks to three days.

A programme of continuous improvement

The T&M team offers our internal users a managed service. As event owners have become aware of our offering, we have seen massive uptake in many regions. We will continue to drive adoption by demonstrating the benefits of using the new service and the tools that are now available.

We will also continue consolidating usage of venues and brands, and increasing collective negotiations to optimise relationships with suppliers and properties, thus delivering more value to EY.





Takeaways and best practices

Travel and meetings programmes are all at different stages on this journey, but there are common goals and opportunities for everyone:

- **Conduct a review of all M&E activity across your organisation – speak to the relevant stakeholders.**
- **Look at the disciplines and best practices in your travel programme and explore ways in which these can be applied to M&E.**
- **Inform your TMC of your objectives at the outset, and discuss how the TMC can support them.**
- **Create a proposal for a T&M team that illustrates the benefits of this single point of contact and reporting.**
- **Build a single M&E policy that is aligned with your travel policy, and implemented and managed by the T&M team.**
- **Research and source an events management platform and aim to drive compliance towards all events being processed via this platform – this will power your visibility, reporting and better risk management.**
- **Build a business case for the extra resources needed to create and implement this combined programme. The business case should demonstrate ROI in terms of savings, productivity and other benefits including duty of care and enhanced user experience.**



- **Keep your key suppliers in the picture, emphasising the positives for them.**
- **Establish a rolling programme of communication and education that illustrates the benefits to all the different stakeholders:**
 - Improved risk management
 - Automation of processes
 - Empowerment and time-saving for organisers
 - Support with vendor contracting
 - Efficient attendee management tools
 - Holistic view of total cost of events
 - Savings through leveraging spend visibility
- **Work towards an ultimate goal of creating a single T&M policy for the organisation.**

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