



Event Operations

How & When to Engage ... and Other Things to Know



Event Lifecycle

Event Lifecycle



Event Lifecycle Detail



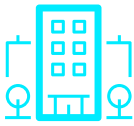
Step 1: Discovery



Step 2: Solution Design



Step 3: Development of Proposal



Step 4: Hotel Sourcing



Step 5: Presentation

Responsible:
Sales

Market: AT&L, Corp., ESN

Objective:
Work with client to understand event overview, event purpose, business and people dynamics, and budget

Responsible:
Sales, Growth Marketing, Proposal & Event Design, Sourcing, Event Management, Housing/Registration Teams

Market: AT&L, Corp., ESN

Objective:
Based on discovery, identify strategy, design needs and solutions

Responsible:
Proposal & Event Design, Event Management

Market: Corp.

Objective:
Build out proposal, with content shared from Hotel, DMC, DMO, AV/GSC/Misc. Suppliers including pricing and present to client.

How & When to Create Success:

- Presale details
- Accurate inclusive pricing
- Communication and collaboration

Responsible:
ESN Sales, Travel Buyer, Sourcing Manager

Market: AT&L, Corp., ESN

Objective:
Responsible for sourcing, consultation, negotiating and contracting, risk mitigation and value documentation. Works directly with client, hotels, DMOs and convention center partners.

How & When to Create Success:

- Timely and complete responses
- Competitive pricing and concessions
- Smooth contracting process
- Continued engagement throughout process

Responsible:
Sales, Growth Marketing, Sourcing, Event Management

Market: Corp.

Objective:
Build out presentation and present



Discovery & Solutioning may **include multiple calls with client and suppliers** to determine path forward.



Step 6: Win & Turnover / Loss

Responsible:

Sales, Proposal & Event Design, Sourcing, Event Management, Housing/Registration

Market: AT&L, Corp.

Objective:

Win: Communicate to all key stakeholders internally/externally, prepare SOW and hotel contract, organize internally and turnover to Event Management to begin preparing DMC, AV, GSC, Misc. Supplier Contracts

Loss: Communicate to all internal/external stakeholders and provide reasons for loss (if known)



Step 7: Event Management

Responsible:

Event Management (MEM), Guest Services, Housing/Registration, Technology, Internal and External Partner Teams

Market: AT&L, Corp.

Objective:

Partner with key client contact(s) and internal/external partners to design overall event experience and project manage timeline, communications and financials

How & When to Create Success:

- Transparent communication
- Clear timeliness
- Detailed, polished proposals with documentation



Step 8: On Site Operation

Responsible:

Event Management, On-site Operations Teams (Travel Staff), Sales, Guest Services, Housing/Registration, Technology, Accounting

Market: AT&L, Corp.

Objective:

Internal team turnover to on-site travel staff and appropriate suppliers to ensure successful event operation through departure day

How & When to Create Success:

- Embrace the basics
- Be local experts
- Maintain high customer service standards



Step 9: Final Billing/ Accounting Audit/ Commission Collection

Responsible:

Accounting, Event Management, Housing/Registration

Market: AT&L, Corp., ESN (Comm. Collection only)

Objective:

Work with internal teams and supplier partners on final reconciliation of event billing, invoicing and accounts receivables

How & When to Create Success:

- Timely invoices
- Quick responses to billing questions
- Final billing documentation



Step 10: Post Con Meetings

Responsible:

Sales, Event Management, Technology, Guest Services, Housing/Registration, Internal and External Partner Teams

Market: AT&L, Corp.

Objective:

Final program review driven by data analytics and lessons learned

How & When to Create Success:

- Detail what worked/what didn't
- Share best practices to pass on to next destination/event



Our Markets

Markets Served

The following terms are used to describe the markets served within Maritz; these are also used when referring to team positions and alignment.

Corporate

Any type of business Maritz manages for a corporate client, whether it is a meeting, incentive, trade show, etc.

AT&L (Association, Trade Show & Live Events)

Any events or services owned by associations (medical, scientific, education, agriculture, etc.) or a third-party media company (e.g. Informa). Live events is less about the market and more about the event type (eSports, fan events, cons, etc.).

SMM (Strategic Meeting Management)

Service model with dedicated employees for each company; the majority of SMM business is automotive and life sciences.

ESN

A team of independent contractors (Event Strategists/EStrats) that sell Maritz products; the ESN is market agnostic.

Edward Jones

While this isn't a market, there is a separate dedicated team that services Edward Jones programs.





Our Teams

Departments & Leaders

Sales: Mary Casey, Chief Client Officer

Include Sales, Growth Marketing, Sales Operations and Destination Engagement

Operations: Steve O'Malley, Chief Operating Officer, Business Events Solutions

Business Transformation, Event Analytics, Event Management (meeting planning), Event Ops (onsite operations), Exhibitor Services, Google Event Services, Guest Services, Housing, Sourcing, Supplier Relations

Global: Ben Goedegebuure, Chief Global Strategy Officer

Global Sales, Environmental Strategy, Industry Presence

Technology: John Wahle, Enterprise Vice President, Technology, Business Events Solutions

Event Registration, Onsite Technology, Onsite Deployment, Product Engineering, Product Management, Security & Privacy and Systems Engineering

Brand & Strategic Events: Greg Bogue, Chief Brand & Experience Officer

Brand, Marketing Communications, Strategic Events and Innovation

Design Studio: Leslie McKee, Vice President, Design Studio

Design Studio, Design Education/Training Research Services and Journeys



Our Terminology

Acronyms

Here are some acronyms you may come across when interacting with a Maritz team member or group.

Sales

- **SAM** - Strategic Account Manager (Director); this sales team supports the AT&L market
- **AE** - Account Executive; this sales team supports the corporate market
- **SSE** - Strategic Solutions Executive; responsible for new business sales
- **TAM** - Travel Account Manager; there are two types of TAMs – Operations or Sales; TAMs are assigned to Corporate Accounts when a client has a large portfolio to manage, or the salesperson is managing multiple accounts that need additional support
- **EStrat** - Event Strategist; this sales team supports all markets within the ESN
- **EDM** - Event Design Manager: supports corporate sales while responsible for proposals, presale budgeting and client contracting.

Sourcing

- **Sourcing Manager** - responsible for sourcing and contracting within the AT&L market
- **Travel Buyer** - responsible for sourcing and contracting Corporate business; there are separate Travel Buyers for the Edward Jones Account

Operations

- **TAM** - see description above under sales
- **MEM** - Meeting Event Manager; leads planning and logistics design on all program components; servicing all markets
- **TD** - Travel Director; these are the individuals that go onsite to execute a program and support the MEM or TAM
- **PM** - Project Manager; this team is associated with the AT&L market and serve as the main operations hub for all services (registration, housing, lead, etc.)



FAQs

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Can you share organizational charts by account?

Due to the MSAs we have in place with our clients, we are unable to share org charts by client account. However, we do try to provide as much detail as possible in the org charts Supplier Relations distributes in January and July of each year.

Can sourcing managers and buyers share what it will take to earn the business? And are they privy to the client's response/requests, or should those questions be directed to sales?

Our team members work closely with sales to provide our supplier partners with details and updates when available. You are always welcome to connect with the sales person directly, but we do ask that you include the sourcing manager/buyer so nothing falls through the cracks.

Who controls the timeline?

Our timelines are driven by client due dates. Each Maritz department reaches out to the appropriate supplier partners as soon as we have specific details about the given opportunity. We always try to provide our supplier partners with the most time possible to ensure that the information provided is verified and complete.

FAQs

Can supplier partners offer FAM and/or personal trips to Maritz team members?

Absolutely! All FAM requests go through the Supplier Relations team, and are then shared internally with our Maritz department stakeholders in sales, sourcing, proposal development and event management. We also encourage you to partner with other MSP² and MDP² partners to create events.

Can Maritz help us explain to the client why we can't take the business, why we may request a pattern shift or why the food and beverage minimum is high?

We always strive to share the “why” when a supplier partner provides detail about why they have turned down business or need to explore other options; this provides the opportunity to offer solutions that may lead to contracting your destination.

