

**RADISSON**  
MEETINGS

## **RHG Knowledge Exchange: Healthcare Planning, Design and Strategy**





As a committed partner to the healthcare events sector, Radisson Hotels is proud to have sponsored and facilitated this transformative workshop, which represents our ongoing commitment to excellence in meeting and event planning.

### Our Vision

Our mission extends beyond providing accommodation – we aim to be recognised as the leading hotel partner for healthcare sector meetings and events. This workshop embodied our strategic approach to understand and address the unique challenges faced by healthcare meeting professionals.

### Measuring Success

The healthcare meeting planning workshop, attended by representatives of 70 companies, achieved remarkable success with a 4.5/5 satisfaction rating, generating 23 innovative solutions and fostering a collaborative network through interactive sessions that addressed critical challenges in healthcare event coordination.

### Looking Forward

This workshop represents more than an event or a moment – it is a statement of the participants and our Radisson teams’ dedication to the healthcare events sector. We are all committed to continually evolving our solutions, understanding the unique needs of our stakeholders, and providing exceptional support for healthcare meetings and events.

### Workshop Objectives Aligned with Our Strategy

The workshop was strategically developed by our partners, 3Sixty Event Consulting and Healthcare-Venues.com, supported by a number of plenary speakers and workshop leads, with three primary objectives:

#### 1. AMPLIFY EXPERT VOICES

We sought to create a comprehensive platform that would provide a meaningful voice to experts within the meeting planning community, ensuring that nuanced insights and professional perspectives were thoroughly explored and documented.

#### 2. SOLUTIONS-ORIENTED COLLABORATION

Participants engaged in dynamic, interactive sessions aimed at co-creating innovative solutions to pervasive challenges specific to healthcare meeting planning. Through structured dialogue and collective expertise, we identified pragmatic approaches to overcome sector-specific obstacles.

#### 3. PROFESSIONAL NETWORKING

Recognising the immense value of peer-to-peer connections, the workshop facilitated structured networking opportunities, enabling professionals to forge meaningful relationships, exchange knowledge, and build a supportive professional ecosystem.



# BEST PRACTICE METHODOLOGIES FOR HEALTHCARE MEETING PLANNING

Bringing together a group of experts in the field, the workshop facilitated the co-creation of a non-competitive approach to critical parts of meeting design. Participants were challenged to consider the key components of effective meeting planning, and to collaboratively outline methodology-based solutions.



**Imagine: 75** of the brightest minds in meeting design, representing **50** leading organisations, converging for two days of intense collaboration and co-creation.



**We dared to challenge the status quo.** A groundbreaking plenary session fused with the precision of **Lean Six Sigma** with the **art of meeting planning**, proposing new levels of efficiency and impact.

"I love how outside of the box it was... I have come away with my own ideas and actions to drive."

**Fuelling this success:** 4 targeted co-creation workshops propelled focused problem-solving and actionable outcomes.



**The verdict? A resounding success.** Participants rated the workshop 4.3/5, affirming its transformative potential.



### Plenary

Integrating Lean Six Sigma and Agile methodologies into healthcare meeting planning.



### Breakout Workshop Disciplines

- Aligning Stakeholders
- Smarter Meeting Design
- Strategic Planning Techniques
- Powerful Partnerships



## Healthcare Meeting Planning: A New Framework

To enhance healthcare meeting strategies, Mark Handforth from 3Sixty Event Consulting advocated for 'breaking the wheel' of traditional planning through a fresh, structured approach. This methodological framework directly addresses existing planning challenges, while also presenting significant opportunities to create a baseline to build a more forward-thinking platform.

Key insights from Crystal Malha and George Hossevoort highlighted that effective meetings are fundamental to business success, yet current meeting processes are often fragmented and undervalued, hindering their potential as a strategic communication channel. This session explored how integrating Lean Six Sigma and Agile methodologies, aligned to the core project management skills of meeting planners, can optimise meeting design and execution, ensuring clear objectives, engaged stakeholders, and improved outcomes.

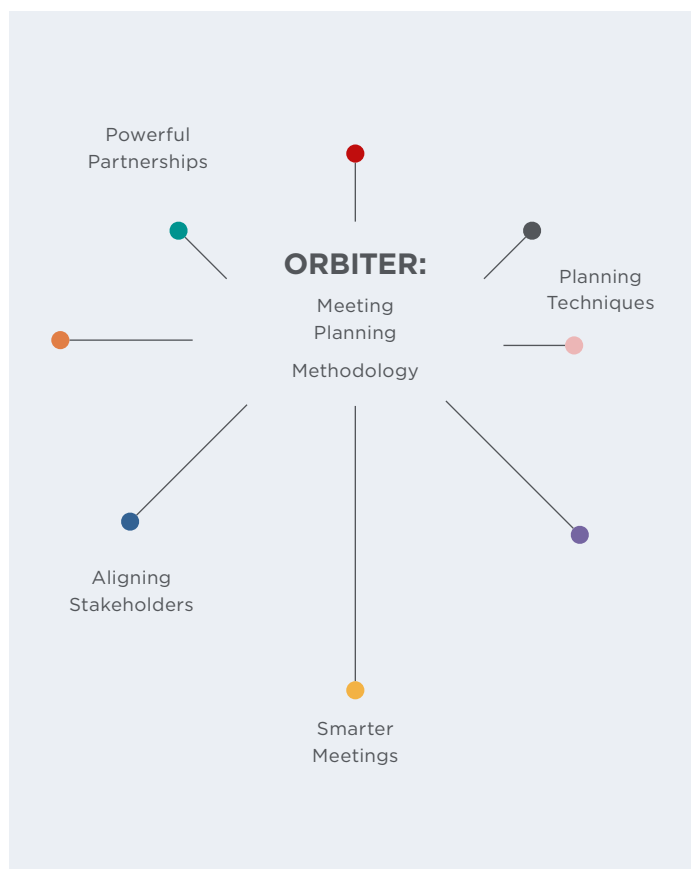
### CHALLENGES AND OPPORTUNITIES

- **Perception:** Meeting planning is too often viewed as merely transactional, not strategic.
- **Value:** Excellent planning is inherently valuable, earning stakeholder respect and enhancing the perceived value of meetings.
- **Complexity:** Modern meetings demand engagement, experience, and tangible outcomes, moving beyond traditional logistical considerations.
- **Potential:** Unlocking planner potential significantly improves outcomes and establishes healthcare meeting planning as a specialised discipline.
- **Growth:** Enhanced skills drive individual and team advancement.
- **Adaptability:** Establishing a baseline allows for adjustments and refinements, creating a foundation for future adaptability in the evolving meeting landscape, and accommodating organisational, stakeholder and meeting participant needs.
- **Framework:** A public, methodology provides a framework for continuous improvement, fostering adaptability, innovation, evaluation, and process simplification.

The role of the meeting creator and planner can be central to this framework. By championing best practices and evolving their processes within this structure, their skills can be fully utilised.

## Orbiter: Meeting Planning Methodology

Named after one of the meeting rooms where the workshop took place **Orbiter: Meeting Planning Methodology** provides a framework to the impact, techniques and outcomes.



Orbiter leaves space to expand the scope of content to address new topics and revise and expand on those created as part of this interaction.

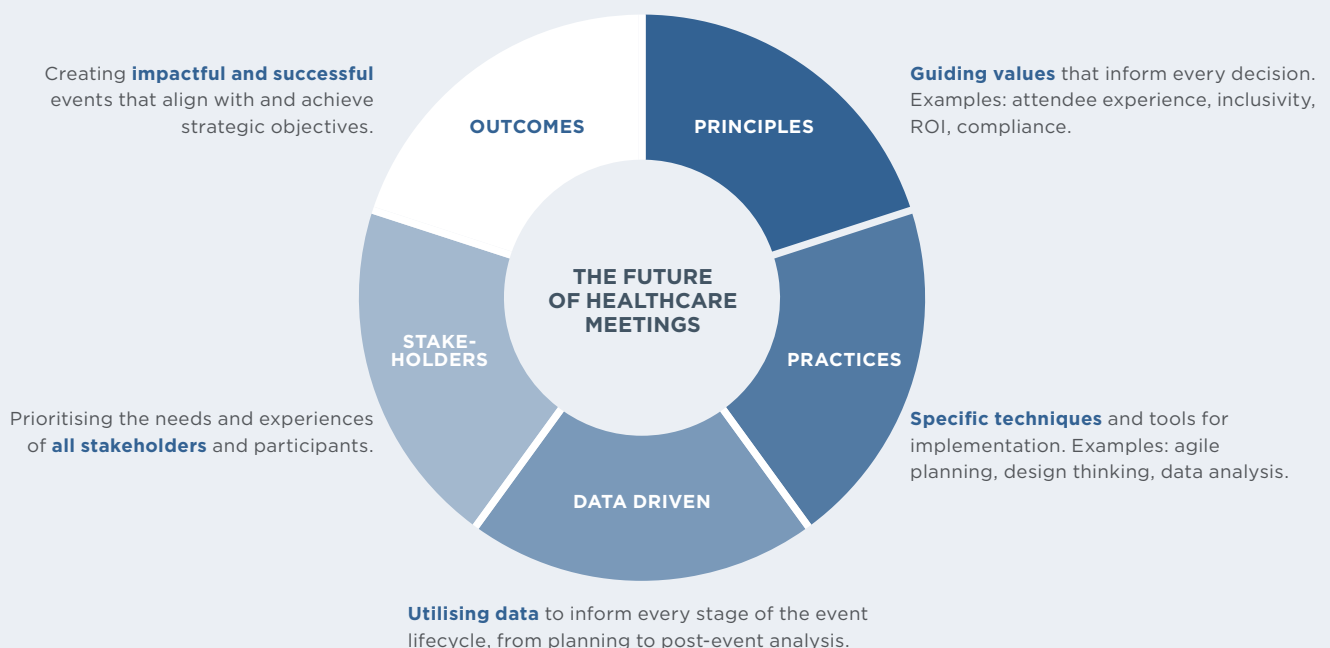
## Building Base: Methodology's Role

It is important to note that this methodology complements existing internal processes, rather than superseding them. This approach ensures that internal processes maintain their organisational integrity, acknowledging that they are often shaped by factors such as: the organisation's size, the availability of human resources (particularly those dedicated to process development, either partially or fully), financial investment, technological capabilities, and the diverse requirements of stakeholders and their respective organisations, including variations in meeting formats.

This graphic best illustrates how methodology and process work in harmony.



**Methodology Framework:** Overarching structure and approach for planning, executing, and evaluating events. Acts as a roadmap for consistency and efficiency.



## Conclusion

To address the evolving landscape of meeting planning, a structured approach is essential, to maintain the pace of change and address business needs.

By aligning our meetings and events with a clear methodology, grounded in strong principles and executed through effective practices, we can create impactful and successful experiences that unlock the talents of meeting planners and deliver meeting objectives.




The group was asked if it endorsed the further investigation of a meeting planning methodology for healthcare sector meetings.



With this endorsement, key future in-person meeting interactions will be used to further develop and refine a methodology.

If you want to be involved, [click here](#) to email the team.

# OPTIMISING MEETING EFFECTIVENESS: A LEAN SIX SIGMA AND AGILE APPROACH

-  Crystal Malha, content contributor and presenter
-  George Hossevoort, content contributor
-  Mark Handforth, content contributor and moderator



*“Meetings and events are not just administrative tasks; they are a strategic communication channel that can drive business goals.”*

Effective meetings are fundamental to business success. However, all too often, meeting processes are fragmented and undervalued, hindering their potential as a strategic communication channel. This section of the report will explore how integrating Lean Six Sigma and Agile methodologies, aligned to the core project management skills of meeting planners, can optimise meeting design and execution, ensuring clear objectives, engaged stakeholders, and improved outcomes.

## The Challenge: Fragmented and Undervalued Processes

Current meeting and event processes can often lack cohesion. Different departments create isolated process steps that don't connect effectively. This fragmentation causes difficulties for meeting planners and stakeholders who must navigate complex, disjointed systems. Consequently, the strategic importance of meetings and events is often overlooked, limiting their contribution to overall business goals.

## A Strategic Approach: The Circular Process

To address these challenges, a more strategic, consistent and end-to-end approach is essential. This model emphasises the importance of consistent data capture for continuous improvement, using insights from previous events to inform future strategies and connect meeting processes to broader communication objectives.

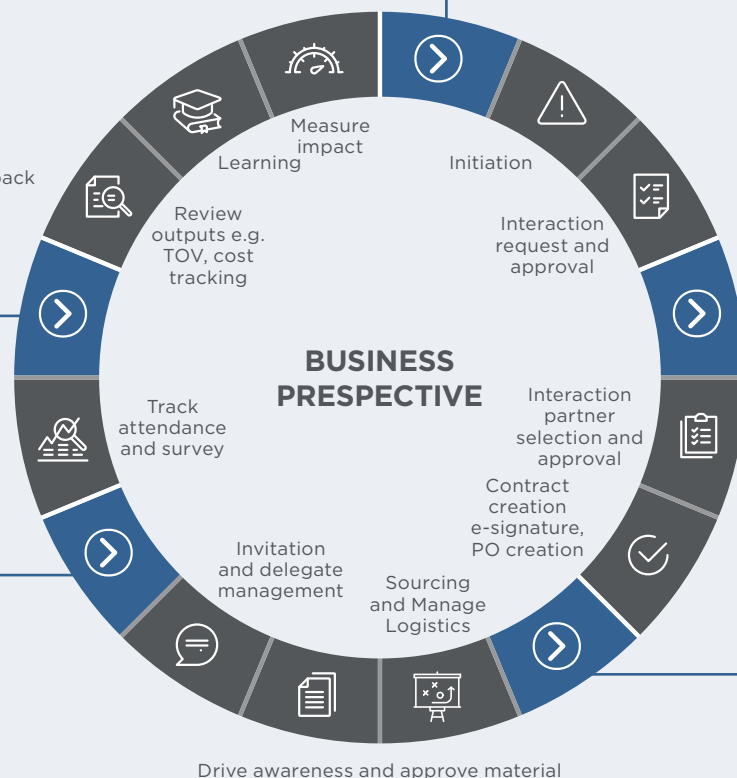
# BUILD MEASURE LEARN

## POST INTERACTION

- Analyse attendance and feedback
- Track and Report on Cost
- Gather and store
- Compliance evidence

## INTERACTION DELIVERY

- Deliver insightful MEE's



## INTERACTION REQUEST

- Request and approve meetings, engagements and events (MEE's) in one solution

## CONTRACTING AND COMPLIANCE MANAGEMENT

- Plan with insights from previous MEE's aligned to current compliance considerations
- Create, approve and sign contracts with integrated compliance
- Integrate with contract storage and finance systems

## LOGISTICS AND MANAGEMENT

- Consistent invitation process
- Source and manage logistics

Drive awareness and approve material

## Enhancing Omnichannel Integration

A key benefit of this circular process of build, measure and learn is the ability to enhance omnichannel integration. In today's communication landscape, HCP's and internal meeting participants interact with organisations through a variety of channels, including in-person meetings, virtual events, email, websites, intranets, social media, and more. An omnichannel approach aims to provide a seamless and consistent customer experience across all these touchpoints.

The circular meeting process supports omnichannel integration in several ways:

- **Data Consolidation:** By capturing data consistently throughout the meeting lifecycle, organisations can create a centralised repository of information. This data can then be integrated with other customer data platforms, providing a holistic view of customer interactions.
- **Content Alignment:** The insights gained from each stage of the circular process can inform content creation and delivery across all channels. For example, feedback gathered during post-interaction analysis can be used to refine messaging and ensure consistency in communication.
- **Personalised Experiences:** A circular process enables organisations to track customer preferences and behaviours, allowing for more personalised experiences across all channels. This can include tailored invitations, customised content, and follow-up communications that are relevant to individual customer needs.

By viewing meetings and events as part of a broader circular process, organisations can break down silos between different communication channels and create a more integrated and effective omnichannel strategy.





## Enhancing Efficiency: Lean Six Sigma Principles

*“The people closest to a process are best placed to improve it”*

Lean Six Sigma can optimise meeting planning by reducing waste (Lean) and errors (Six Sigma), transforming unproductive events into efficient and successful communication channels.

To optimise this process, Lean Six Sigma principles can be effectively applied.



**Lean** focuses on eliminating waste and smoothing process flow. This involves identifying and addressing sources of waste such as:

*“Thinking tools and mindset”*

- **Rework:** Rework in meetings and events includes revising agendas or re-contacting speakers due to miscommunication or redesigning venue layouts because initial plans didn't account for accessibility needs.
- **Overprocessing:** Overprocessing in meetings and events occurs when excessive presentation detail is included, complex registration processes are used, or elaborate catering is arranged that exceeds the event's needs.
- **Waiting:** Waiting in meetings and events refers to delays such as waiting for stakeholder approvals, attendees waiting for a delayed start, or waiting for equipment to arrive due to logistical issues.
- **Complexity:** Complexity in meetings and events arises from having too many decision-makers involved, convoluted processes for budget management and supplier contracting, or overly complicated audio-visual setups.

**Six Sigma** processes concentrate on reducing errors, improving quality, and increasing efficiency by minimising variation and defects.

*“Frameworks and analysis tools”*

The core principles of Lean Six Sigma emphasise a focus on the customer (stakeholders and participants), empowerment, transparency, systematic improvement, and data-driven decision-making.

### BENEFITS:

- **Efficiency:** Eliminates *waste*, for example unnecessary approvals, saving time and resources.
- **Quality:** Reduces *errors*, ensuring focused meetings with clear objectives and consistent outcomes.
- **Stakeholder Satisfaction:** Streamlines processes for a positive experience for attendees and organisers.
- **Data-Driven Improvement:** Uses data to identify improvements and track progress objectively.
- **Cost Reduction:** Eliminates waste, reduces *errors*, and optimises resource use.

In conclusion, Lean Six Sigma offers significant benefits for organisations but requires careful implementation to balance structure, manage change, and avoid pitfalls.

### RISKS:

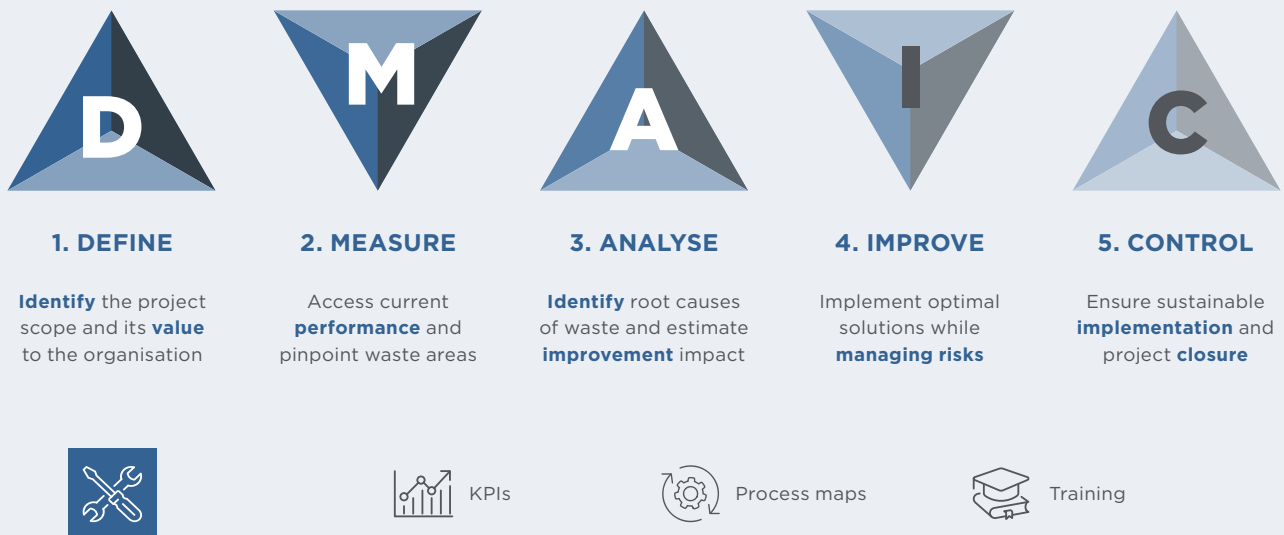
- **Rigidity:** Can create overly structured processes, hindering flexibility.
- **Resistance:** Requires change, which can face opposition.
- **Initial Investment:** Needs upfront resources for training and analysis.
- **Data Overload:** Excessive data focus can overshadow implementation.
- **Lack of Context:** A generic approach may be ineffective; adaptation is key.





# DMAIC: Driving Efficiency and Impact in Meeting Planning

While the intricacies of Lean Six Sigma may initially appear daunting to those unfamiliar with it, the core DMAIC (Define, Measure, Analyse, Improve, Control) methodology offers a structured and accessible process. This framework can effectively bridge knowledge gaps and provide a practical approach to significantly improve meeting efficiency and outcomes.



## Use case example:

### PRODUCT LAUNCH

**Overview:** DMAIC optimises pre-launch, launch, and post-launch events (KOL, HCP, sales) to maximise drug launch effectiveness.

- **Define:** Define event objectives (aligned with launch strategy) and success metrics.
- **Measure:** Measure current performance (engagement scores, attendance, feedback, budget adherence, impact).
- **Analyse:** Analyse data to find root causes of issues (e.g., low engagement, poor sign up, inconsistent messaging, country affiliate feedback).

- **Improve:** Implement solutions (e.g., refine KOL strategy, standardise formats, improve logistics).
- **Control:** Sustain improvements (monitor feedback, track metrics, audit processes).

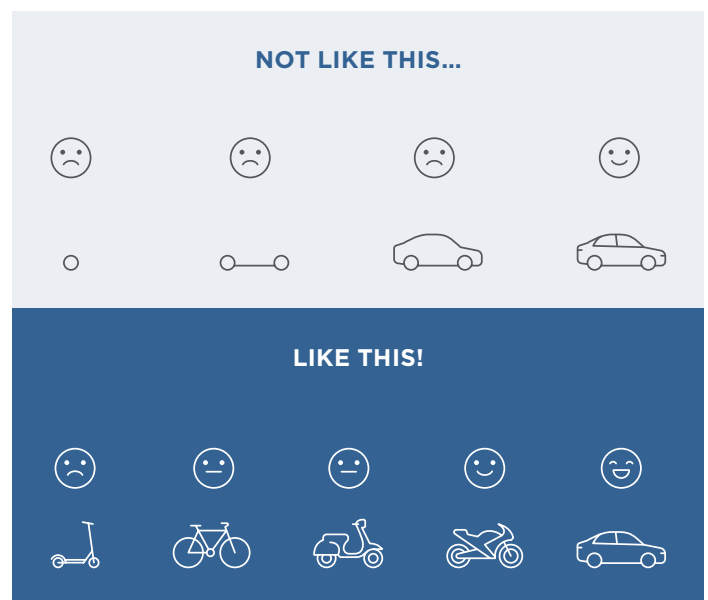
**Key Benefit:** Maximised Launch Impact: DMAIC ensures strategic, flawless event execution for increased KOL engagement and effective message delivery.

In this scenario, the skills of a meeting planners can be identified at each step. They should champion this structured approach, collaborate with stakeholders to establish roles and responsibilities, and focus on their core strength: ensuring that experience, timelines and deliverables remain on track.

## Agile Methodology: Iterative Improvement

*“Agile’s iterative approach allows for continuous improvement delivering value incrementally.”*

Agile methodology, particularly the Scrum framework, provides a structured approach to managing process improvement. Agile breaks down projects into short iterations called sprints, typically lasting two to three weeks. Each sprint delivers an incremental improvement, allowing for continuous feedback and adaptation.



## The Scrum framework includes:

- **Product Backlog:** A prioritised list of requirements in relatable user story format.
- **Sprint Planning:** Defining sprint goals and identifying tasks.
- **Sprint Execution:** Collaborative work by a cross-functional team.
- **Sprint Review:** Stakeholder assessment and feedback.
- **Sprint Retrospective:** Internal team evaluation for process refinement.

This iterative approach enables teams to respond to changing requirements, deliver value quickly, and ensure alignment with business needs.

## Agile Events: Shorter Planning Meetings, Bigger Impact.

The traditional one-hour weekly meeting for event planning is challenged by Agile Scrum thinking. This model implements shorter, intensive sprints, enabling faster decisions and earlier actions. This approach creates the time to focus on improving overall event outcomes.

### A Path to Better Meetings

This part of the workshop addressed the strategic fragmentation and overly tactical nature of meeting planning, which leads to significant inefficiencies and can impact the potential of meetings as an effective engagement channel. To overcome this challenge, Lean Six Sigma and Agile methodologies offer a structured approach to enhance meeting planning efficiency, providing an opportunity to “break the wheel” of less effective practices and integrate the skills of meeting planners. Whether applied to a single event, a therapy area, or an entire organisation, these frameworks facilitate continuous improvement by aligning meetings with strategic objectives. This shift contributes to better engagement, improved budget management, and more effective execution.

With the growing influence of AI and omnichannel strategies in event planning, a data-driven, step-by-step improvement process helps to streamline implementation, reduce inefficiencies, and enhance overall quality. By applying principles such as DMAIC (Define, Measure, Analyse, Improve, Control) and Agile’s iterative cycles, organisations can ensure that meetings are not only well-executed but also consistently refined to meet evolving business needs.

# WORKSHOP SUMMARY: ALIGNING STAKEHOLDERS

Aligning stakeholders through strategic communication, proactive planning, and expert-led engagement to elevate meeting planning from planning to partnership.

This workshop addressed the critical challenge of stakeholder misalignment in meeting planning. It recognised that the role of a meeting planner can often be undervalued and perceived as a task-oriented function rather than a strategic one. This can lead to miscommunication, unmet expectations, and a failure to maximise the value that meeting planners can bring to the process. The workshop aimed to tackle this problem by exploring strategies to enhance stakeholder alignment, emphasising a shift towards a **consultative approach**, with effective communication as a cornerstone for success. The discussions sought to redefine the meeting planner's role as a strategic and expert one driving successful outcomes rather than a task executor.

## Workshop Focus: Understanding Stakeholders

The workshop began by focusing on stakeholder personas, highlighting the critical importance of truly understanding customer needs and how to maximise value in stakeholder interactions to bake in for the stakeholders the belief that a meeting planner is with them on a shared goal. Participants engaged in exercises to identify and understand stakeholder personas, acknowledging that event planners work with a range of stakeholders. The key takeaway was that ***understanding stakeholders personally, considering their personality and role level, is more effective than relying on demographics or assumptions***. This personal understanding facilitates tailored communication, builds trust, and enhances the perception of the planner as an expert and trusted partner.



### UNDERSTAND STAKEHOLDER PERSONAS

Meeting planners have a range of stakeholders, principally the budget, content and outcomes holders. However, the content of this document was considered to apply to them all.



PROCUREMENT



AGENCY  
PROJECT  
MANAGER



CORPORATE  
MEETING  
PLANNER



HR  
DIRECTOR



BRAND  
DIRECTOR



MEDICAL  
DIRECTOR



## Key Challenges: Engagement and Communication

This workshop tackled the challenges of stakeholder engagement and alignment. Through realistic role-play scenarios, it spotlighted common pitfalls in securing stakeholder alignment. The key takeaway? Don't just focus on the 'how' and 'what'; begin with the 'why'. Why is this project important? What are the organisations and stakeholder objectives, how do they define value? What should the outcomes and key takeaways for participants be, and how does the stakeholder measure success? Crucially, probing the 'why' behind choices and deadlines, and adopting a broad perspective on projects, revealed the value a meeting planner can bring, from understanding objectives from all stakeholder viewpoints.

A significant barrier identified was a sense of apathy among some meeting planners who felt that this was outside of their scope and did not recognise the benefits, which can hinder a proactive, solutions-oriented approach. Effective communication was highlighted as crucial for building trust, easing client concerns, and positioning planners as experts and partners. This involves understanding stakeholder needs, wants, objectives, and pressure points and adapting communication styles accordingly.

### Methodologies for Success: A Cyclical Approach

The workshop outlined an overarching methodology to develop and enhance stakeholder alignment based on a cyclical process: Identify, Understand, Implement, and Review.

*"A continuous cycle of review ensures communication is always 'warm' and supports a successful relationship."*



- **Stakeholder Analysis:** Mapping stakeholders, defining roles clearly, and understanding individual personas, and what drives their needs and actions.
- **Strategic Communication:** Establishing clear communication standards, tailoring communication to stakeholders, and ensuring regular, transparent updates.
- **Proactive Problem-Solving:** Demonstrating expertise by anticipating challenges, offering solutions, and guiding clients strategically.
- **Internal Alignment:** Fostering collaboration and alignment among internal stakeholders to provide optimal solutions for clients.
- **Value Definition:** Aligning with the client on the definition of 'value' to ensure that the meeting planner is adding relevant value, meeting and exceeding expectations.

*“The Power of ‘Why?’:  
Embrace a consultative  
approach. Don’t just react  
—ask ‘why’ to uncover  
deeper needs and  
provide greater value.”*

## Workshop Outcomes: Top Tips and Key Takeaways

The workshop culminated in a set of top tips and key takeaways designed to enhance stakeholder alignment and elevate the role of the meeting planner:

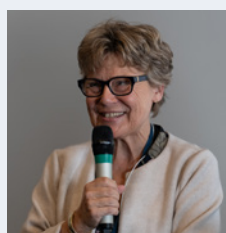
- **Adopt a Consultative Mindset:** Approach stakeholder interactions with expertise, offering proactive guidance and solutions.
- **Invest in Understanding:** Take the time to thoroughly understand stakeholder needs, objectives, and expectations. Extend kick-off calls where necessary.
- **Prioritise Communication Excellence:** Ensure clear, transparent, and regular communication tailored to each stakeholder’s needs and preferences. Apply the less-is-more principle where possible.
- **Be Proactive and Solution-Oriented:** Anticipate potential challenges, offer solutions, and guide clients strategically to avoid pitfalls.
- **Focus on Preparation and Planning:** Conduct thorough research, define roles, and establish clear processes and timelines.
- **Foster Internal Alignment:** Collaborate effectively with internal stakeholders to ensure cohesive and effective client solutions.
- **Demonstrate Expertise and Value:** Build confidence, showcase expertise, and focus on delivering value-added outcomes.



## Aligning stakeholders quick checklist

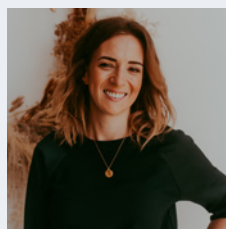
1. Identify the decision maker(s) in a stakeholder collective
2. Align on roles & responsibilities, not just the logistics profile of a meeting
3. Observe Communication style and preferences
4. Identify long-term and short-term planning objectives
5. Include Meeting outcomes

## Workshop leads



### CERSTIN STEINDORF

MCI – Global Account  
Director, Healthcare



### CHARLIE CRABTREE

Crabtree Consulting

# WORKSHOP SUMMARY: SMARTER MEETINGS

A consistent smarter meetings methodology ensures that meetings become more than just events—they become experiences that inspire action, foster collaboration, and drive measurable outcomes.

The Smarter Meetings Workshop explored strategies to enhance meeting engagement, optimise content sharing, and improve overall meeting design. The scope of the workshop was for live, virtual and hybrid formats. The workshop's goal was to align best practices with healthcare professional (HCP) expectations and develop a structured methodology for smarter, more effective meetings. Specifically, the workshop aimed to identify key challenges and barriers, define best practices, create practical tools, and establish a framework for continuous improvement.

It was clear that the meeting planner, acting as a champion of smarter meeting design, plays an important role in driving meeting outcomes. They achieve this by sharing best practices with stakeholders, advocating for optimal techniques, and contributing in crafting meeting experiences that maximise engagement and efficiency.

## Identified Critical Issues Impacting Meeting Effectiveness:

Throughout the workshop, several critical issues impacting the effectiveness of meetings were identified, including:

- **Lack of clear structure and strategic planning:** Many meetings lack clear objectives, leaving attendees disengaged.
- **Passive participation and low interactivity:** Delegates often act as passive listeners rather than active participants.
- **Technology overload vs. underutilisation:** Some meetings use excessive tools that complicate engagement, while others fail to leverage digital solutions effectively.
- **HCP expectations vs. actual meeting design:** Many meetings do not align with what healthcare professionals (HCPs) truly value—such as accessibility, personalisation, and professional development.
- **Lack of measurable outcomes and continuous improvement:** Most organisations lack structured methodologies to measure and refine meetings over time.



To overcome these barriers, we developed a methodology that focuses on three key pillars:

### 1. STRATEGIC DESIGN

Ensuring that meetings are planned with a clear purpose and audiencecentric approach.

### 2. ENGAGEMENT AND EXPERIENCE

Creating an environment where attendees actively participate and feel valued.

### 3. MEASUREMENT AND OPTIMISATION

Using structured scorecards and continuous feedback loops to refine future meetings.



# Tools

The workshop developed key tools to enhance smarter meeting effectiveness:

**Smarter Meetings Scorecard:** This is a tool for assessing meeting effectiveness. It uses categories like “Strategic Alignment” and “Content Effectiveness,” each with key factors and a scoring system. Use of the scorecard helps to measure and improve different facets of meetings.

## CATEGORY AND KEY FACTORS

### Strategic Alignment

Clear objectives, targeted audience, relevance

### Delegate Journey

Seamless experience, structured pre/during/post

### Content Effectiveness

Engaging, informative, aligned to HCP needs

### Technology Utilisation

AI, event apps, immersive tools (balanced use)

### Interactivity & Engagement

Active participation, discussions, collaboration

### Facilitation & Support

Onsite support, professional facilitation, AV

### Measurement & Follow-up

Surveys, analytics, post-event learning capture



**Score (1-10)**

1 – Low  
10 – High

## CALA Model (Collect, Analyse, Learn, Adjust):

This model provides a structure for continuous improvement. It's a cyclical process: data is gathered (e.g., engagement metrics), analysed to find strengths and weaknesses, lessons are applied to refine meeting strategies, and adjustments are implemented in future meetings. This addresses the problem of meetings not evolving and maximising their impact.

## C.A.L.A

To assess and refine meeting effectiveness, we introduce the Smarter Meetings Scorecard:

### COLLECT

Gather engagement metrics, surveys, attendance data.

### ANALYSE

Identify strengths, trends, and areas for improvement.

### LEARN

Apply findings to refine strategies and meeting formats.

### ADJUST

Implement changes for future meetings based on insights.

**Engagement Scorecard:** This scorecard is used to rate engagement activities. It assesses activities based on criteria like interactivity, accessibility, and impact on learning. This helps in evaluating and optimising which activities are most effective in fostering engagement.

- Workshop
- 1:1 Speed Dating
- Marketplace/Booth
- Networking Program
- Q&A (Pre/Post)
- Surveys
- Business Room



**INTERACTIVITY**



**IMPACT**

1-10 scale  
1 = low, 10 = high



**TIME EFFICIENCY**



*“Continuous improvement is key to sustained engagement and impact.”*

## Summaries

Key takeaways and tips from the workshop discussions include:

- **What a smarter meeting looks like:** High-quality content delivered by expert speakers. Personalised delegate journey ensuring engagement and impact. Seamless integration of technology (AI-driven content. Live translation, interactive tools). Structured networking opportunities for professional collaboration, and respect for time and professional development needs.
- **Barriers to smarter meetings:** Language and accessibility issues (lack of translation tools. Poor post-event content access). Technology overload (too many disconnected tools, user complexity). Passive content formats limiting engagement and interaction. Venue limitations (poor acoustics, temperature, space constraints), and perceived lack of ROI in time and cost investment for attendees.
- **Smarter meeting logistics and execution:** Personalised pre-event invitations. Interactive formats during events (AI-driven content, immersive experiences), and actionable post-event follow-ups.
- **Tools for smarter meetings:** Utilising event platforms (e.g., SpotMe, Slido, Microsoft Teams). Engagement tools (e.g., live polling, Q&A), and digital content access (e.g., QR codes, event apps). Future enhancements focusing on AI-powered engagement analytics. Immersive experiences (e.g., VR, silent speaker systems). AI-driven translation and accessibility, and more personalised networking tools.

## The Smarter Meetings Methodology

The Smarter Meetings Methodology (SMM) is designed to be a practical, repeatable framework that can be applied across different meeting types, from small-scale internal team sessions to large-scale HCP congresses. It can be used for strategic meeting planning, enhancing engagement and experience, and measuring and improving meeting success. The SMM framework can also be applied across internal interactions where effective meetings are crucial, including corporate leadership summits, educational and training sessions, and sales and marketing conferences.

### Workshop lead



#### LESLIE ROBERTSON

Founder and Owner,  
Open Audience

# WORKSHOP SUMMARY: STRATEGIC PLANNING TECHNIQUES

What defines best-in-class meeting planning? It starts with a planner and stakeholder partnership built on clear objectives.

This workshop was designed to equip participants with a clear definition of strategic meeting planning whilst providing a set of tangible ideas and tactics to help elevate the positioning of meeting planners, moving the dial from tactical support to strategic business partners.

The primary workshop output was the co-creation of a framework and set of principles that are meeting type agnostic and provide a clear and consistent strategic methodology around meeting planning.

## The Dream Team: Planner and Meeting Stakeholder

This section presents an analysis of general meeting planner and meeting stakeholder (owner) characteristics, focused on role definition. It's important to note that this analysis reflects broad traits and attributes rather than specific individuals or job descriptions. The primary outcome of this exercise was to understand better the key drivers and qualities that could contribute to a best-in-class meeting planning process.



### MEETING PLANNER

The meeting planner is a strategic, organised, and detail-oriented individual, focused on effective communication, time management, problem-solving, and possessing strong project management and agile scrum style skills to ensure meeting planning and on-site execution run smoothly.



### MEETING STAKEHOLDER

The meeting stakeholder (owner of business outcomes) is a leader who provides clear direction, manages other business stakeholders, fosters collaboration, focuses on outcomes, and sets realistic expectations to ensure meetings achieve their objectives and stay within budget.

## Checklist of Actions

### FOR MEETING PLANNER

- **Strategic Planning:** Develop a methodological planning approach for each meeting, aligning with overall goals.
- **Organisation and Preparation:** Ensure all logistical and material aspects of the meeting are organised and prepped in advance.
- **Time Management:** Create and stick to planning deadlines whilst encouraging others to do the same.
- **Communication Skills:** Practise clear and effective communication with all participants.
- **Problem-Solving:** Anticipate potential issues and develop solutions.
- **Project Management Skills:** Utilise strong project management skills to oversee meeting planning and execution.
- **Agile Scrum Knowledge:** Apply agile scrum principles if relevant to the meeting format.
- **Attention to Detail:** Focus on even the smallest details to ensure a smooth meeting.

### FOR MEETING STAKEHOLDERS

- **Vision and Objectives:** Clearly define the meeting's vision, objectives, and desired outcomes.
- **Stakeholder Management:** Manage the interests and expectations of all business stakeholders.
- **Clear Communication:** Communicate the meeting's purpose and expectations clearly to participants.
- **Collaboration:** Foster a collaborative environment where all participants can contribute.
- **Outcome Focus:** Drive the meeting towards achieving specific, measurable outcomes.
- **Budget Oversight:** Ensure the meeting stays within budget and resources are used efficiently.
- **Realistic Expectations:** Set achievable goals and expectations for the meeting.
- **Target Adherence:** Keep the meeting on target and focused on the key objectives.

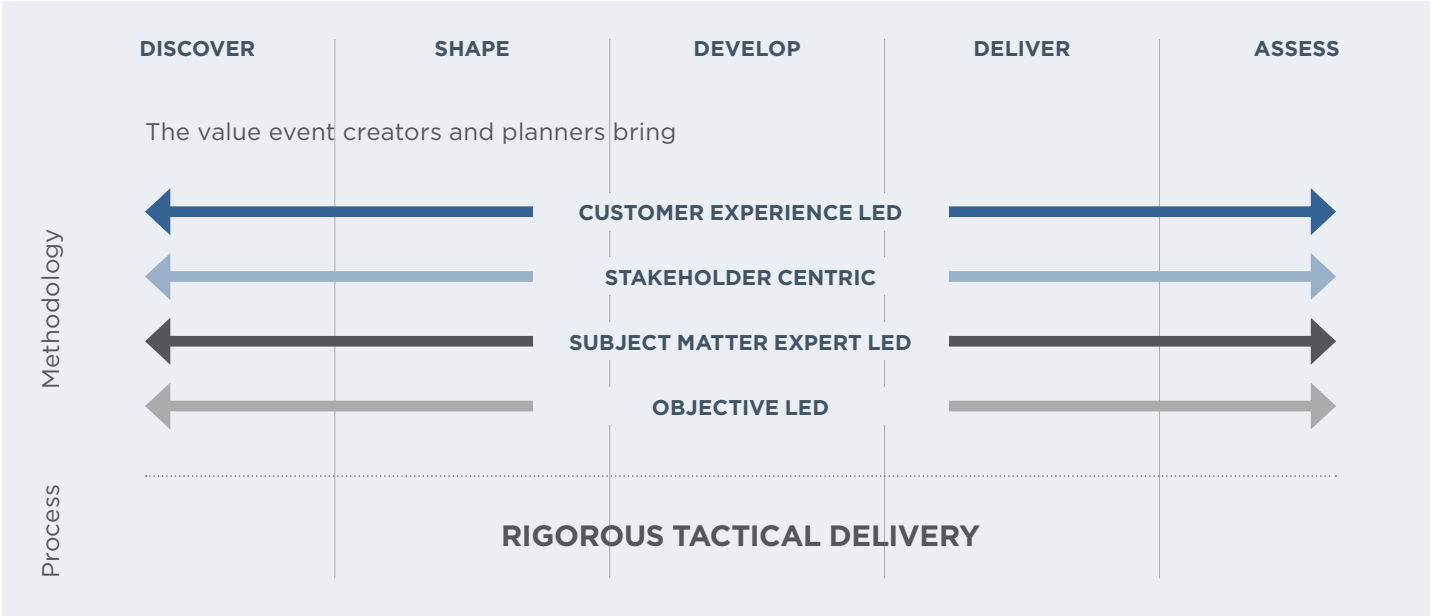


Having established the key traits and responsibilities of effective meeting planners and stakeholders – with a strong emphasis on defining clear objectives – it’s crucial to examine how this objective-driven approach can reshape the planner’s function. The value they bring now can extend beyond logistical excellence. As illustrated in the following analysis, planners have the potential to be instrumental in developing and more often supporting achieving meeting objectives, embedding this focus throughout the entire event lifecycle.

### Beyond Logistics: Mastering Objective-Led Event Planning

This graphic illustrates a shift towards a more balanced tactical and strategic role for event creators and planners. It highlights that their value extends beyond mere logistics (“Rigorous Tactical Delivery”) into a realm of planning methodologies which integrates strategic thinking and actions. This elevation is demonstrated by the planner’s involvement in shaping the event around key pillars: customer experience, stakeholder centricity, subject matter expertise, and, crucially, objective-led planning. The “Objective Led” methodology, spanning the entire event lifecycle from “Discover” to “Assess,” emphasises that meetings are now driven by clear, measurable goals.

*“A focus on measurable objectives reshapes meetings, driving impact throughout the event lifecycle.”*



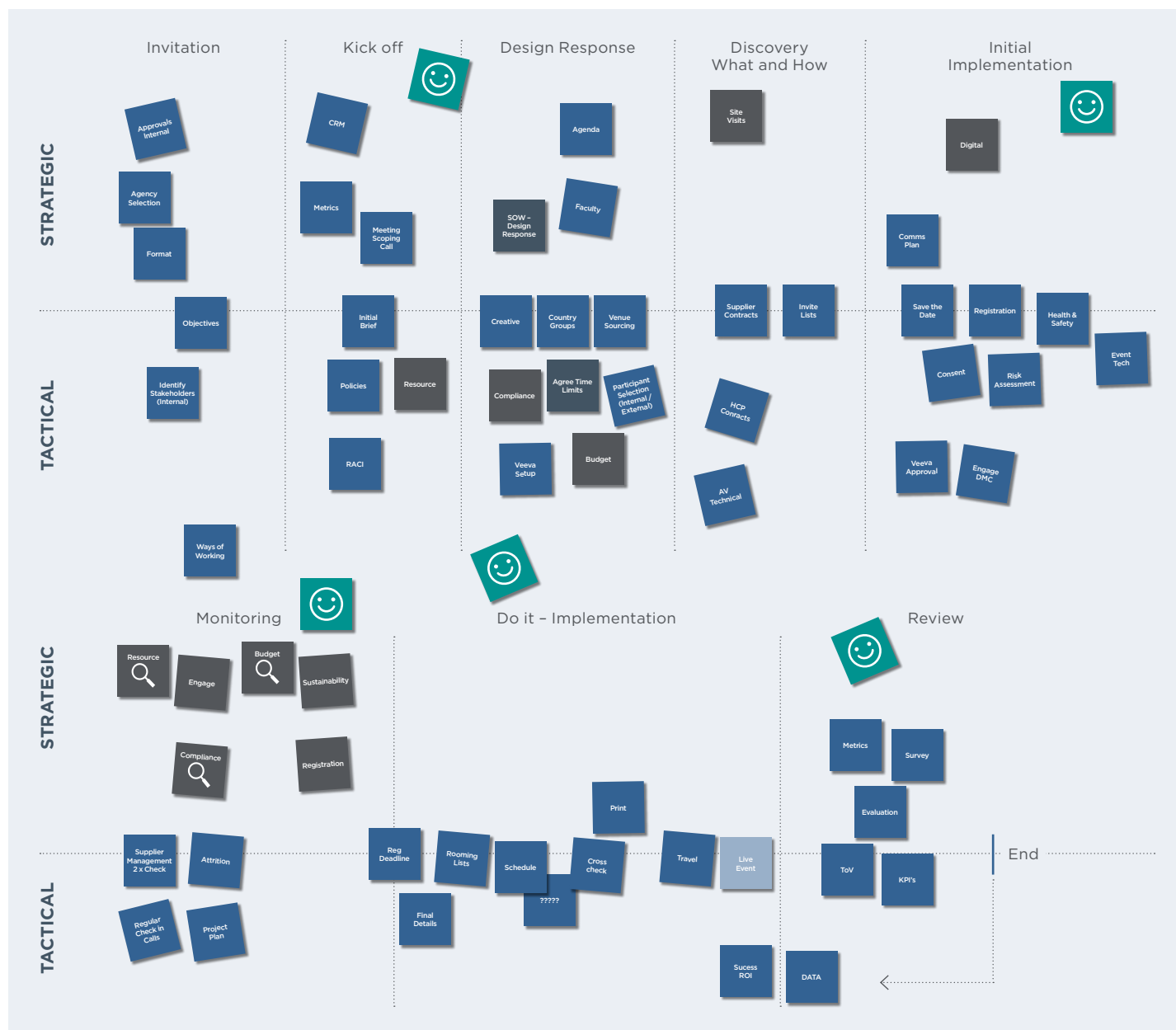
### Earning a Seat at the Table: Navigating the Shift to Objective-Led Planning

This evolution of meeting planning demands a dual focus. While meticulous attention to process and logistics remains crucial for seamless execution, there’s a growing emphasis on a deep understanding of event objectives. However, this shift isn’t always straightforward. There can be barriers to a planner’s contribution to the meeting strategy, as stakeholders may be hesitant to fully embrace this expanded role or may not initially recognise the planner’s competency and value in this area. Overcoming this requires a

delicate balance: planners must continue to leverage strong planning and people management skills to streamline processes, demonstrating their value while simultaneously advocating for and proving their ability to contribute strategically to the overarching objectives of the meeting.

Building on the need for meeting planners to balance tactical execution and strategic objectives, Figure X visually represents this as a planning spectrum from tactical to strategic.

# “Objective Drive” Planning Methodology



## Summary

In conclusion, this workshop emphasised that effective medical meeting planning relies on planner-stakeholder collaboration with clear objectives. Planners are evolving beyond logistics to strategically support objective achievement throughout the event lifecycle. While balancing tactical execution and strategic input can be challenging, planners can demonstrate their value and maximise meeting impact by embracing this objective-driven approach.

## Workshop leads



**LEANNE GALEA**

Head of Meetings and Events (EU), Emota



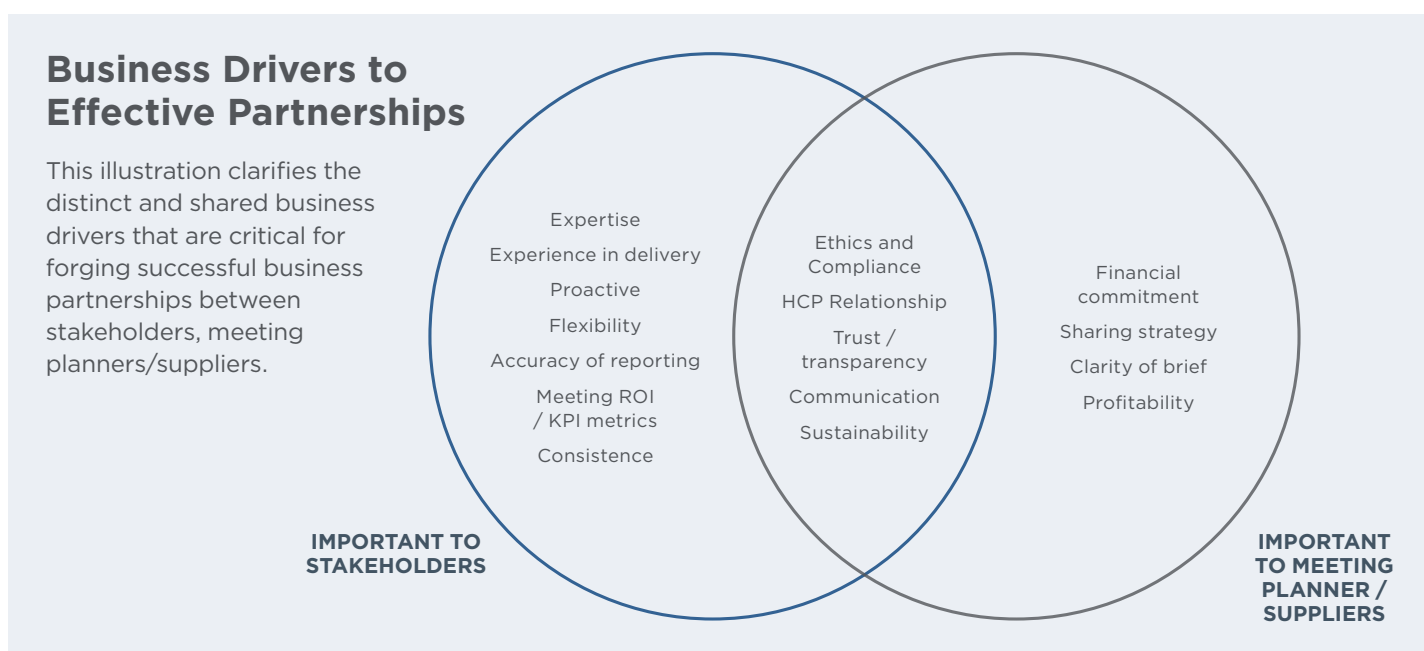
**ANDREW MOORE**

Senior Account Director, Inizio Engage XD

# WORKSHOP SUMMARY: POWERFUL PARTNERSHIPS

Don't just measure metrics, build trust. Successful partnerships thrive on transparency and mutual respect.

This workshop aimed to create a methodology for evaluating, identifying gaps, and providing a framework for building powerful relationships for healthcare sector meetings. The group reviewed the evolution of healthcare partnerships and defined the fundamental elements of successful collaborations. In many cases, meeting planners serve as the crucial first point of contact for numerous suppliers, playing a pivotal role in interpreting and facilitating the delivery of company strategy. They also provide a critical cultural interface, embodying the organisations and stakeholder's values and setting the tone for supplier relationships. The workshop recognised the significance of these roles in fostering effective partnerships.



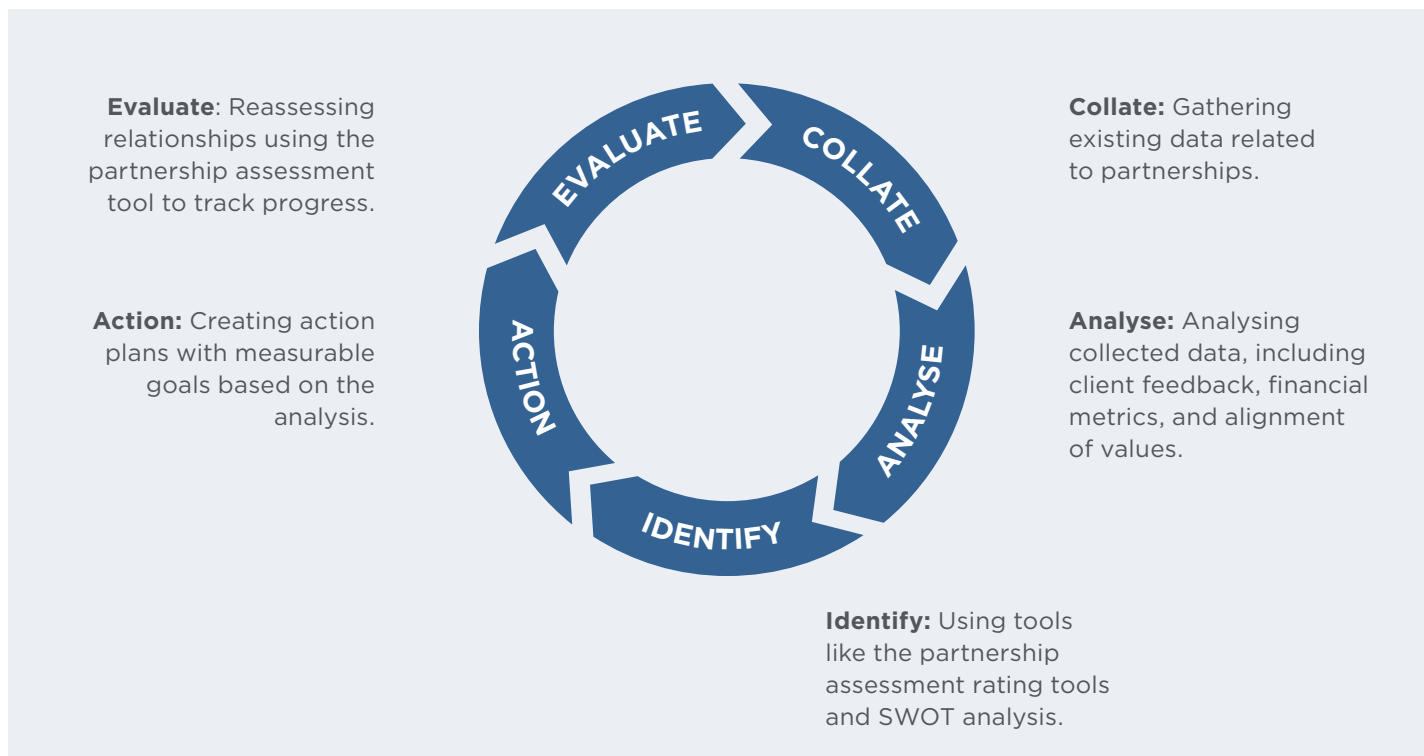
The necessity for a powerful partnership's methodology is underscored by a number of key factors:






- **Complex Stakeholder Needs:** The diagram clearly illustrates that stakeholders and meeting planners/suppliers have distinct business drivers. Stakeholders prioritise expertise, delivery excellence, and achieving ROI, demonstrating a need for partners who can deliver quality and value. Meeting planners/suppliers, on the other hand, focus on financial viability, clear expectations, and sustainable business. A method bridges these differing needs.
- **The Importance of Shared Values:** Despite differing priorities, the diagram also highlights crucial shared drivers: ethics and compliance, HCP relationships, trust, communication, and sustainability. These shared values are fundamental to successful collaborations but require a structured approach to ensure they are consistently upheld and strengthened. A method also provides that structure.
- **Need for a Structured Process:** The workshop's development of a cyclical methodology (Collate, Analyse, Identify, Action, Evaluate) directly addresses the need for a structured process to manage partnerships. This process, supported by tools like a partnership assessment rating tool, enables stakeholders and suppliers to move beyond ad-hoc interactions towards a more strategic and measurable approach to partnership development.
- **Focus on Continuous Improvement:** The emphasis on evaluation and action plans within the methodology highlights the importance of continuous improvement in partnerships. By providing a framework for assessing relationship health, identifying areas for improvement, and implementing corrective actions, the methodology fosters stronger, more resilient partnerships over time.



## Powerful Partnership Process

Identifying all needs led to the creation of a cyclical, constant improvement, process:

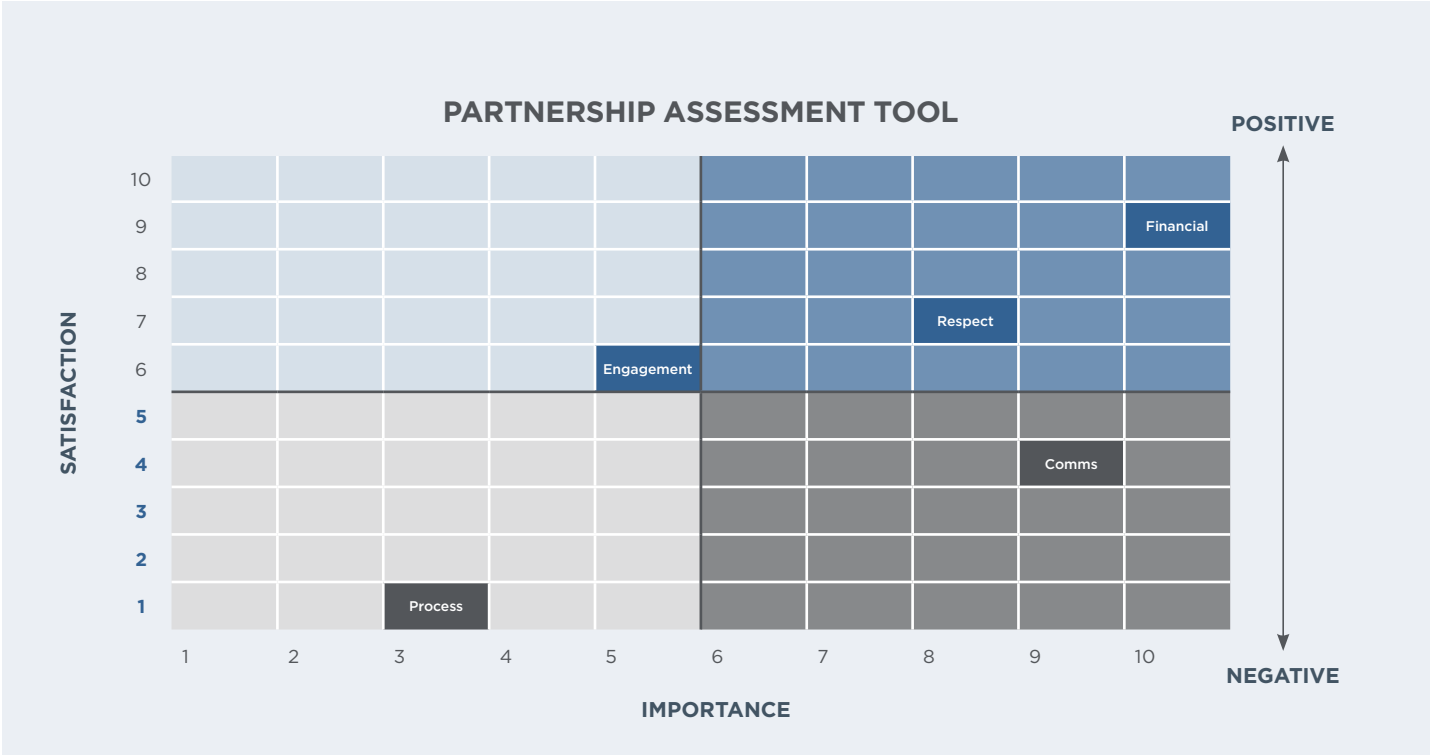


 <p><b>EVALUATION &amp; METRICS</b></p> <p>Client feedback surveys</p> <p>Attendee evaluation tools post-event</p> <p>Financial metrics</p> <p>Repeat business metrics</p> <p>Faculty/speaker evaluation</p>	 <p><b>PARTNERSHIP ASSESSMENT</b></p> <p>Research values, mission statements etc.</p> <p>Personality alignment</p> <p>Past reviews</p>	 <p><b>OPERATIONAL FACTORS</b></p> <p>Lead times</p>	 <p><b>FEEDBACK</b></p> <p>Internal feedback from team</p>	 <p><b>STRATEGIC ALIGNMENT</b></p> <p>Overall goals and objectives</p> <p>Competitor info/review</p>
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*“Partnerships are a journey, not a destination. Continuously reassess and refine your collaborations for sustained success.”*

# Partnership Assessment Tool

The partnership assessment tool evaluates key aspects of a business relationship, such as Financial, Communication, Respect, Engagement and Insights, and Process Management, to identify areas for improvement.



This evaluation framework is adaptable, providing categories of assessment with flexible criteria. The specific metrics can be tailored to each partnership’s unique goals and the requirements of different meeting types.

## Evaluation Framework

		SUPPLIER ASSESSMENT	STAKEHOLDER ASSESSMENT
FINANCIAL		Profitability, Revenue growth, Future pipeline opportunity	Return on investment, value added services
COMMUNICATION		Transparency, flexibility, clarity, consistency of contacts	
RESPECT		Respectful attitude and treatment of team	
ENGAGEMENT AND INSIGHTS		Sharing of business changes, priorities, focus, pro-active behaviour	
PROCESS MANAGEMENT		Ease of business process	Adhere to business processes

# Action Plan

This method-based approach lends itself to clear steps.

Step 1:	Review the results of the partnership assessment rating.
Step 2:	Identify any topics that are below five (in orange on the graph) – prioritising any that are 5+ (deep orange) in importance.
Step 3:	Do a deep dive into those topics – breaking into the sub-categories and rating again if applicable.
Step 4:	Once the root cause of the problem is identified, decide on a goal to improve and a timescale – share the goal with the internal team, and the client/supplier if appropriate.
EVALUATION PHASE	
Step 1:	Using identified timescale from action plan, reassess relationship using the partnership assessment tool.
Step 2:	Overlay previous results to see movement.

## Summary

A robust partnerships methodology is essential for navigating stakeholder complexities, ensuring alignment on core values, and implementing structured processes that drive continuous improvement. This approach fosters more effective and mutually beneficial collaborations.

### Key takeaways include:

- The importance of factors beyond metrics and data, such as trust and transparency, in building successful partnerships.
- Using a structured methodology to assess and improve partnerships.
- Employing a partnership assessment rating tool to evaluate and compare different aspects of the partnership, highlighting areas for improvement.
- Creating action plans to address weaknesses and setting improvement goals.
- Regularly evaluate partnerships to ensure ongoing development and success.

### Workshop lead



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While we encourage the further use of this content, we respectfully request that any reference to this material cites the source as: "Radisson Healthcare Meeting Workshop, London 2025".

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