

# Planned

## Learn how our client **centralized everything** from external to internal events in one platform

### At a Glance

This leading fintech company with over 10,000 employees was looking for a solution to centralize internal and external events across their subsidiaries. The company wanted to put their existing real estate to use to improve their employee experience. Planned was able to centralize their disjointed processes into one platform, improving planning efficiencies significantly.

From the very early stages of implementation, Planned improved the planning efficiency of every team - events, travel, workplace, facilities, catering, and AV - and became a strategic partner for their meetings and events program.

#### ABOUT

Our client is a leading fintech company in the commerce solutions space, with innovative technology in point-of-sale systems, payment transfer, investment and bitcoin services.

#### COMPANY SIZE

Over 10,000 employees worldwide  
Publicly traded  
5 subsidiaries

#### SCOPE

3,500+ events per year



# Challenge

Prior to partnering with Planned, the company was using Google Calendar to book internal spaces. However, many employees hired remotely during the pandemic were not very familiar with the office. Some new hires had never seen the internal spaces, and therefore gravitated to external venues they felt more comfortable booking. Without people interacting with the office frequently, the company was looking for a way for them to interact with it digitally, showcase capabilities, and encourage internal bookings.

*Throughout the pandemic, the company provided their employees with the flexibility to work from anywhere. Post-pandemic, they were seeking ways to encourage people to come into the office through meetings and events.*

*The goal was to properly engage their employees, ensure their happiness and satisfaction, and provide a positive user experience for every stakeholder.*

*Meetings and events have become the forefront of their overall strategy as a company.*

The company picked Planned as their solution of choice to create dynamic listings of their internal spaces and improve the booking experience for all employees.

The screenshot displays the Planned app interface for a listing titled "The Download room". The listing includes a header with the Planned logo, navigation links for "My events" and "General Conference Event 2023", and user options for "My listings" and "Inbox". Below the header are three images: a meeting room with a round table and orange chairs, a modern office interior with large windows, and a staircase with a glass railing. The main content area features the title "The Download room" with a location pin icon, followed by the address "Central Office | 13111 N Central Expy #480, Dallas, TX 75243, USA". A descriptive paragraph states: "We created this space to share regenerative culture in as many ways as possible. We host green community events, support aligned small businesses, donate space to social causes, and provide a platform for regenerative projects to form. Many people also use our space for weddings, parties, photo and film shoots and as a co-working facility." Three key metrics are displayed in a grid: "SPACE TYPE: Meeting room", "CAPACITY: 30-75 guests", and "ROOM SIZE: 1,252 sq ft". Below this is a "Building amenities" section with icons for Parking, Natural light, Library & game room, Dog friendly, Customizable desks & chairs, and Screen with Chromecast access. A "Capacity per seating type" section lists "Cocktail: 55 guests" and "Classroom: 75 guests". The "Location" section includes a map and a location card with the address "13111 N Central Expy #480, Dallas, TX 75243, USA" and distances from the airport and subway (both 0 km). On the right side, there is a "Book a time slot" section for the "General Conference Event 2023" in May 2023. A calendar grid shows dates from 1 to 31, with the 18th highlighted. Below the calendar, there are fields for "Start time" (11:30 AM) and "End time" (1:30 PM), a "Number of attendees" field (15), and a "Message (optional)" field. A "Send request" button is at the bottom of the booking section.



Beyond the internal spaces feature, our client wanted to support their own customers (ie. vendors using their POS systems) within the marketplace. Planned accommodated this request by onboarding our client's vendors to seamlessly integrate them into the platform.

For the larger events taking place outside of the office, the company was also facing difficulties: disjointed processes, multiple teams replicating the same work, events happening out of policy. They wanted Planned to help them unify the booking experience to save time and money.

## New workplace and event trends

Corporate event planning has become increasingly decentralized. Anyone can now potentially be in charge of planning an in-person event, whether it's for team building, a client dinner or an executive meeting.

But not everybody knows how to do so efficiently, and within budget. This was the case for our client, and the Planned platform became the solution for its easy to-use interface which enables planners to leverage deals, save time and money, and execute successful events.

In pursuit of operationalizing office space, workplace teams are increasingly seen as hospitality managers. Planned's platform supports the roles and responsibilities of anyone from workplace, procurement, new planners and experienced planners.

As well, Planned's room block capabilities support the need for accommodation bookings and keep the entire process centralized.

The main challenge they faced was how to fix a disjointed process, and the solution started with figuring out how to market their offices.

### Internal spaces

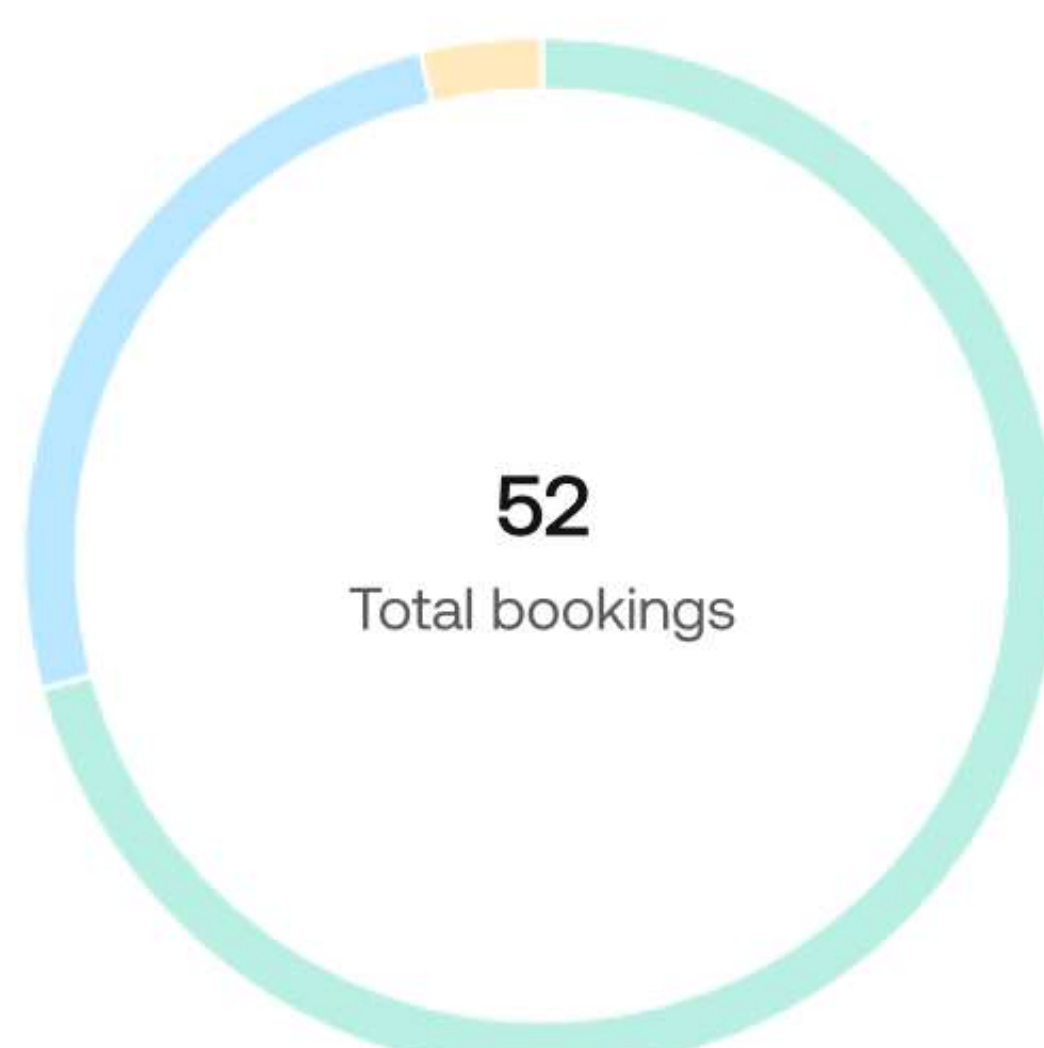
City

Office

Country

#### Bookings by month

< Mar 2023 >



Conference room B	25 (71%)
Event Lab	16 (25%)
Main room	12 (4%)
Conference room C	12 (4%)
Learning Space	6 (4%)
Rotunda	2 (4%)
Round room	0 (0%)

Guests served

800

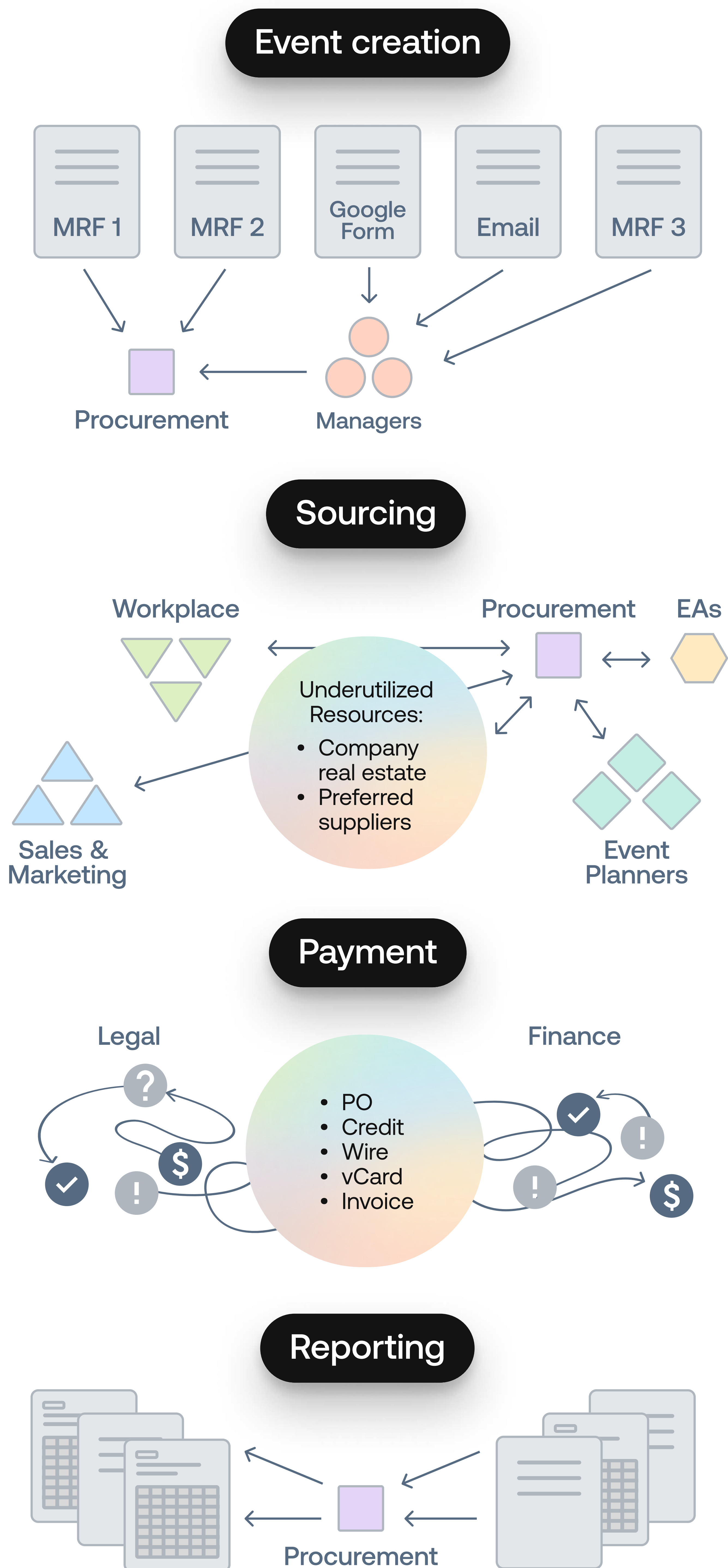
Most in demand space

Conference room B

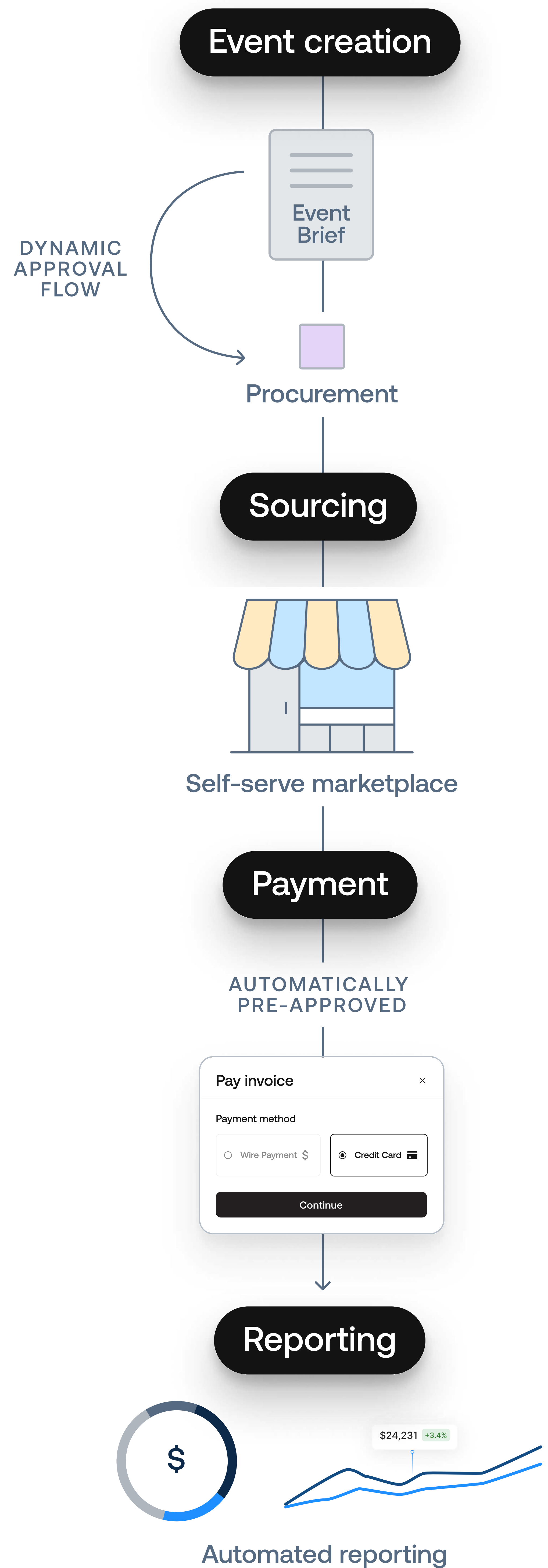
## THE MAIN GOAL:

To provide **visibility and data** to three key stakeholder groups: travel, events, and workplace and **streamline** the planning process

### BEFORE PLANNED



### WITH PLANNED





# Solution

The company chose Planned as its go-to solution for every event: internal and external of every size. They execute more than 3,500 events per year, up to \$500,000 per event.

Prior to the tech implementation, event planners had to go through a lengthy checklist and reach out to catering, facilities, events, travel, and trust & safety in a disjointed process.

Planned clients have unlimited users. Within the platform, every stakeholder can collaborate on events and approve requests. Having the centralized communication and collaboration speeds up processes at every stage of planning. As well, our automation features such as AI-powered sourcing and real-time reporting remove manual work as much as possible. This is how we centralize a decentralized process and help companies save.

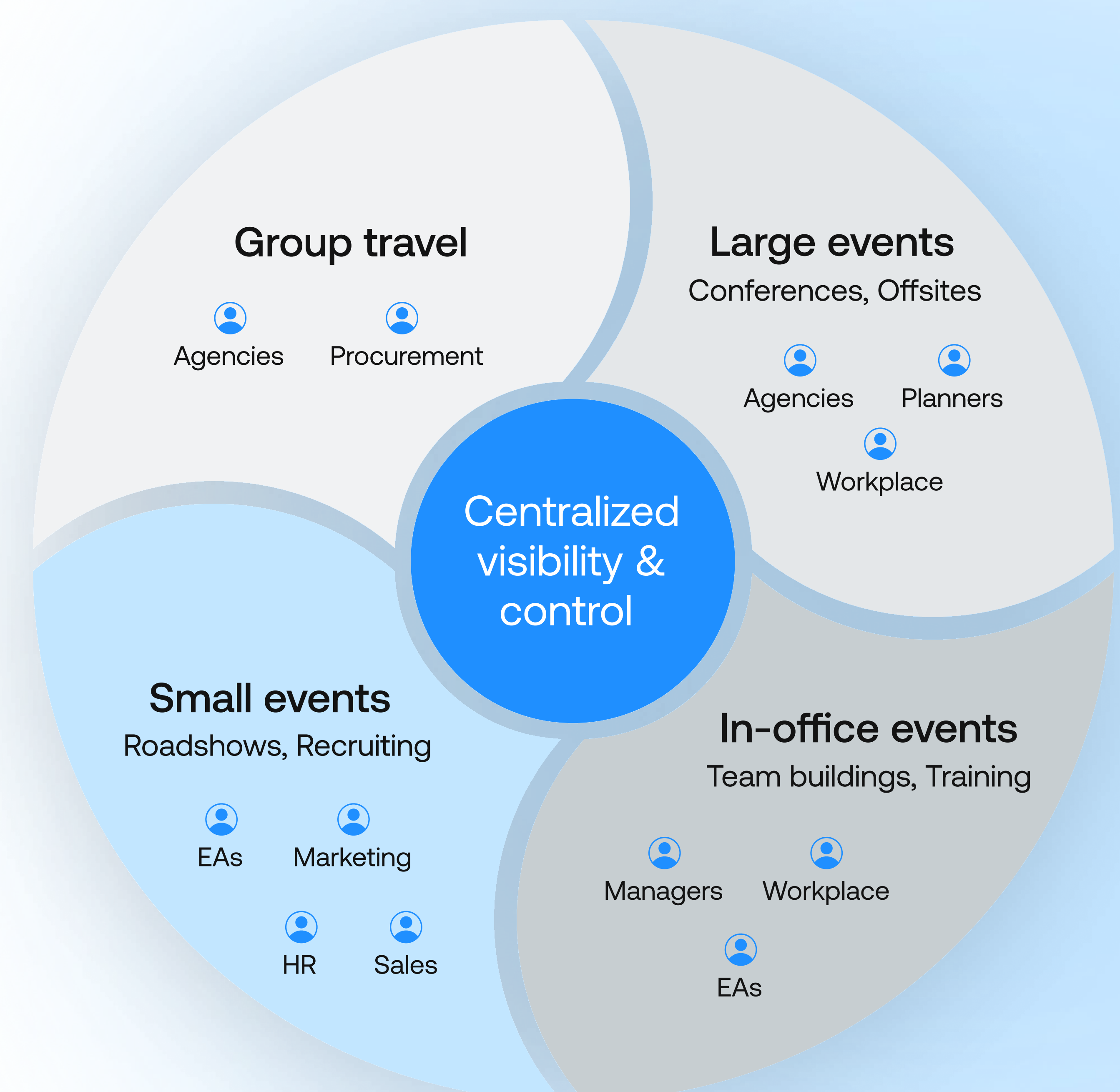
To further streamline the process, Planned customized the company's meeting request form to trigger notifications and invites to relevant stakeholders. An example would be:

*If there are more than 10 sleeping rooms required, travel becomes involved. If there is alcohol being served, trust and safety is made aware of the event. In this way, Planned is their central source of truth for everything meetings and events, and the chance of something being overlooked or miscommunicated is greatly reduced.*

The overall use case was to provide visibility and data to three key stakeholder groups: **travel, events, and workplace**. As well, it was to fix a disjointed process and streamline the experience for the meeting requester.

Internally, Planned helps the company market their existing real estate to employees and streamline communications between the meeting requester, facilities & office managers, AV, catering, and stakeholders.

Externally, Planned provides a better booking experience for the events team and meeting requesters. Users enjoy a streamlined sourcing, booking, payment and contracting experience, while the admin maintain oversight on events happening company-wide.



A key goal for the client was improving internal space utilization, which the tool allowed them to achieve while centralizing all types of events.



## Planned features used by this client:

- Sourcing for venues, accommodation, catering, and more
- Listing, booking, and managing internal spaces
- Embedded policies and custom approval flows
- Hotel room block & RSVP
- Payments & contracting
- Tracking spend, savings, and space usage

## Unveiling key features

As a very data-driven company, they have expressed excitement around the in-depth, real-time reporting capabilities. This will enable the company to know exactly how many meetings have taken place and all their respective details, process that data, and forecast for the future.

With an HRIS integration, Planned empowers them to track the data across different cost centres, departments, user locations and offices.

As well, ongoing access to this up-to-date information enables better negotiation with external suppliers. For example, if they booked 1500 rooms with the Marriott in year one, they might be able to pre-negotiate a better rate in year two across Marriott properties because they have the data they need on hand, whereas previously they did not.

## What's to come

We're excited to be working with this leading fintech company and their subsidiaries as we continue to add new features to the platform. Considerable developments have taken place thus far, and throughout the partnership we intend to continue that upward trend in development.