

**OPTIMISING THE WORKFLOW FOR MID-MARKET
PLANNERS IN THE CVENT SUPPLIER NETWORK**

A PROJECT REPORT

SUBMITTED IN PARTIAL FULFILLMENT OF THE REQUIREMENTS
FOR THE AWARD OF THE DEGREE

OF

MASTER OF DESIGN
IN
VISUAL COMMUNICATION

Submitted by:

SUPREET KAUR

(2K22/MDVC/09)

Under the Supervision of

PROF. NEERAJ RATHEE



DEPARTMENT OF DESIGN

DELHI TECHNOLOGICAL UNIVERSITY

(Formerly Delhi College of Engineering)

Bawana Road, Delhi - 110042

MAY, 2024

DEPARTMENT OF DESIGN
DELHI TECHNOLOGICAL UNIVERSITY
(Formerly Delhi College of Engineering)
Bawana Road, Delhi - 110042

CANDIDATE'S DECLARATION

I, Supreet Kaur, Roll No – 2K22/MDVC/09, student of M.Des (Visual Communication), hereby declare that the project dissertation titled “Optimising the Workflow for Mid-market Planners in the Cvent Supplier Network (CSN)” which is submitted by me to the Department of Design, Delhi Technological University, Delhi in partial fulfillment of the requirement for the award of the degree of Master of Design, is original and not copied from any source without proper citation. This work has not previously formed the basis for the award of any Degree, Diploma Associateship, Fellowship, or other similar title or recognition.

Place: Delhi

SUPREET KAUR

Date: 3 May 2024

DEPARTMENT OF DESIGN
DELHI TECHNOLOGICAL UNIVERSITY
(Formerly Delhi College of Engineering)
Bawana Road, Delhi - 110042

CERTIFICATE

I hereby certify that the project dissertation titled “Optimising the Workflow for Mid-market Planners in the Cvent Supplier Network (CSN)” which is submitted by Supreet Kaur, Roll No: 2K22/MDVC/09, Department of Design, Delhi Technological University, Delhi in partial fulfillment of the requirement for the award of the degree of Master of Design, is a record of the project work carried out by the students under my supervision. To the best of my knowledge this work has not been submitted in part or full for any Degree or Diploma to this University or elsewhere.

Place: Delhi

Date: 3 May 2024

Prof. Neeraj Rathee

SUPERVISOR

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Department of Design
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OFFER AND APPOINTMENT LETTER

November 20, 2023

Dear Supreet Kaur,

We are pleased to offer you the position of **Intern, Product Designer, Band 00** within **Technology** Department at Cvent India Private Limited and your base location will be Gurugram, Haryana. We look forward to having you on board with us on **January 08, 2024**.

Your stipend during the internship period from **January 08, 2024 to June 28, 2024** will be **₹ 50,000** per month

Upon successful completion of your internship period, we may confirm your employment w.e.f. **July 01, 2024** as **Product Designer I, Band 01**. Your Total Annual CTC for a period of 12 months from your confirmation date has been defined as **₹ 1,328,605 (Rupees Thirteen Lacs Twenty Eight Thousand Six Hundred Five Only) ("Annual CTC")**. Your annual CTC includes your benefits, overtime, annual discretionary performance bonus and any bonus payable under the provisions of The Payment of Bonus Act, wherever applicable ("**Bonus**"). Additionally, you are also entitled to receive following as per the company policy.

Bonus Type	Amount payable	Payout time	Recovery Clause
Retention Bonus 1	₹ 100,000	12 months completion from confirmation date	If you leave before completion of 12 months from Date of payout
Retention Bonus 2	₹ 100,000	18 months completion from confirmation date	

Upon your successful completion of the performance cycle with the Company, you will be eligible to receive the Bonus, pro rated from the date of your joining. The Bonus will be paid out on or about **March 31, 2025**. The actual Bonus amount payable may vary, based on your performance and is subject to guidelines laid out in employee handbook or communicated via email or intranet from time to time.

You will be eligible for the first increment after successful completion of 12 months from your date of joining, i.e. with effect from **July 01, 2025**. Such increment is subject to your performance and Company's performance and Cvent may in its sole discretion revise the increment should you fail to meet the performance criteria laid out by your manager.

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You will be on probation for three months beginning the date of your joining during which period the Company can terminate your services by giving prior notice of one month or salary in lieu thereof. Additionally, Cvent reserves the right to not confirm your employment after the successful completion of your internship period. Upon completion of probation, your employment shall be deemed confirmed, unless communicated otherwise by the Company. In the event, your performance is found to be unsatisfactory, the Company may extend your probation for a further period of time as may be deemed fit by the Company.

08
M

Post completion of probation, either party may terminate this appointment by giving the other party two months' notice. The Company may at its sole discretion chose to pay salary in lieu of the said notice period. Notwithstanding anything to the contrary, in the event of the occurrence of any of the scenarios as listed in the Employee Handbook under heading "Employee Terminations - Termination" (including without limitation, failure of PIP, insubordination, fraud/forgery etc), the Company may at its sole discretion terminate your employment with the Company without any notice or payment in lieu thereof.

DocuSigned by:
Supreet Kaur
January 11, 2024

DEPARTMENT OF DESIGN
DELHI TECHNOLOGICAL UNIVERSITY
(Formerly Delhi College of Engineering)
Bawana Road, Delhi - 110042

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Place: Delhi

SUPREET KAUR

Date: 3 May 2024

ABSTRACT

Event managing and planning can be a very challenging and stressful job for planners, requiring effective time management, efficiency, and coordination through each stage. Being the third most stressful job in the world (World Scholarship Vault, 2022), event technology can be useful for saving time by automating manual processes. Event technology helps enhance an experience and allows for more professional ways of planning and reliable execution (O'Connor, 2016). Event planning involves several stages that can be categorized as pre-event, during-event, and post-event, according to Wiley (2018). In the pre-event stage, which primarily involves logistics and planning before the event takes place, one of the jobs of the event planner is to source a suitable venue. This involves the planner searching for a location/destination/venue that will be appropriate for the event or meeting. Cvent offers SaaS-based solutions that automate the process of event planning. One of these solutions is the Cvent Supplier Network (CSN) which automates the venue-sourcing process for planners. The focus of this project is to gain insights into how mid-market planners (MM planners) leverage CSN for sourcing venues, understand their needs and challenges, and identify all the gaps or friction points they encounter. The ultimate goal is to recommend solutions that can help optimize the workflow for mid-market planners and make their CSN Phoenix (CSN PHX) experience seamless, intuitive, and easy to use. CSN Phoenix is the new experience that proceeds the older version called Normandy. The main objective of the new planner experience is to increase adoption and planner engagement in CSN. There are different categories of planners, which include enterprise/corporate planners, third-party planners, and casual/occasional planners but this project primarily revolves around discussing the ways to tap into

mid-market planner capabilities. The key to gaining a deeper understanding of mid-market planners was the primary study that involved unmoderated interviews with client-facing internal stakeholders. The stakeholders belonged to the product, sales, research, and client services team. The interview findings were consolidated and analyzed by conducting a thematic analysis. Some of the important insights surfaced usage of the platform by mid-market planners. Since these planners are within the system only a few times a year, and leverage the most basic bundle as their licence module, they do not have an active client success team assigned to them as it is not very profitable. As a result, they lack awareness of the system's features, functionalities, and updates. Additionally, MM planners are not very well-versed with the system and lack the necessary support to address the challenges encountered on the platform. As a result, they find the system very complex to use and is not customized to their needs. Once the emerging findings were analyzed and prioritized to formulate the key pain points/HMW statements, the next step was to move to the Ideation stage. To achieve this, a brainstorming workshop with participants from cross-functional teams was conducted. the subsequent steps involve analyzing the emerging ideas, creating paper prototypes, low-fidelity and high-fidelity prototypes, and concluding with testing.

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LIST OF ABBREVIATIONS

MM	Mid-Market
CSN	Cvent Supplier Network
PHX	Phoenix
HC	Hospitality Cloud
EC	Event Cloud
CS	Client Success
POC	Point of Contact
RFP	Request for Proposal
TPP	Third Party Planner
GANE	Government, Association, Non-Profit, Education
NSO	National Sales Officer

CHAPTER 1 INTRODUCTION

1.1 UNDERSTANDING EVENTS

Events are temporary planned gatherings that serve a special purpose that is meaningful (Dowson et al., 2022) or create an emotional impact on the attendees. The purpose of an event can vary from simple to complex, greatly depending on what are the desired outcomes or objectives one seeks to accomplish by organizing it. Whether the purpose is to celebrate a milestone, or special occasion, such as a birthday or anniversary, education, networking, product launch, promotion, marketing, entertainment, or information exchange, events are an engaging way of bringing individuals from different backgrounds together for collective action.

As per Dowson et al. (2022), the event can be visualized in the following manner:

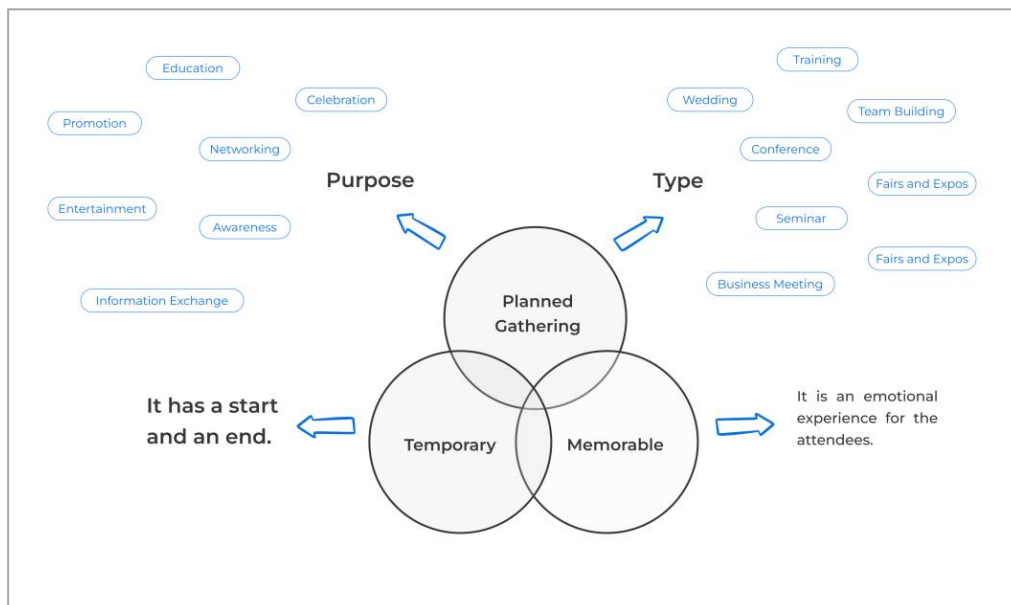


Figure 1.1: Defining an event; Source: Dowson, R., Albert, B., Lomax, D. (2022). Event Planning and Management: Principles, Planning and Practice. United Kingdom: Kogan Page.

1.1.1 Life cycle of an event

Since events are temporary, they have a distinct beginning and end. Consequently, when planning an event, there are several stages involved and these stages can be categorized based on the type of activities involved during each phase. Every stage requires careful planning, coordination and attention to detail to ensure a seamless and successful event. From seeking approvals, managing logistics, event promotion, and addressing the needs of in-person attendees till the end of the event, the entire cycle requires careful consideration and execution to leave a lasting impact.

The event cycle can be divided into three stages (Figure 1.2):

i. Pre-Event: Logistics/Execution

- This is the planning stage of an event. The pre-event stage plays a crucial role in determining the success of the event, as it establishes a strong foundation. It begins with seeking the necessary approvals and listing the event requirements.
- This is followed by determining the event objectives, target audience, and budget. Next, venue sourcing comes into the picture where you determine the destination and venue that best suits the needs of your event.
- The event planner also starts devising strategies around event promotion as well as taking care of various logistical responsibilities, including registration, audio-visual entertainment, coordinating food and beverage arrangements, accommodation, and travel management, to name a few.

ii. During: Engagement

- This is the stage where your primary focus is the engagement of the attendees. This is where seamless coordination and a well-planned event agenda come into the picture. As an event planner, one needs to be proactive to ensure all the event activities run smoothly and as per the schedule.

- The event commences by ensuring a seamless check-in experience. Since this will be the initial point of interaction for the attendees, it should be ensured that the entire experience of check-in and badge printing is simple and efficient. This sets the right tone for the event from the beginning.
- Other important aspects of the “during” stage are lead capture, documentation of ongoing activities, presentations, and sessions, as well as gathering attendee feedback to get valuable insights for future reference.

iii. Post-Event: Insights

- Post-event, the event planner reflects on the performance of the event. The focus shifts to preparing the event results, reporting and analyzing the attendee data to gain an understanding of their needs, challenges and preferences.
- Measuring the event results helps determine the return on investment and overall success of the event. This analysis allows the planner to identify the key areas of improvement and opportunities for future event planning.

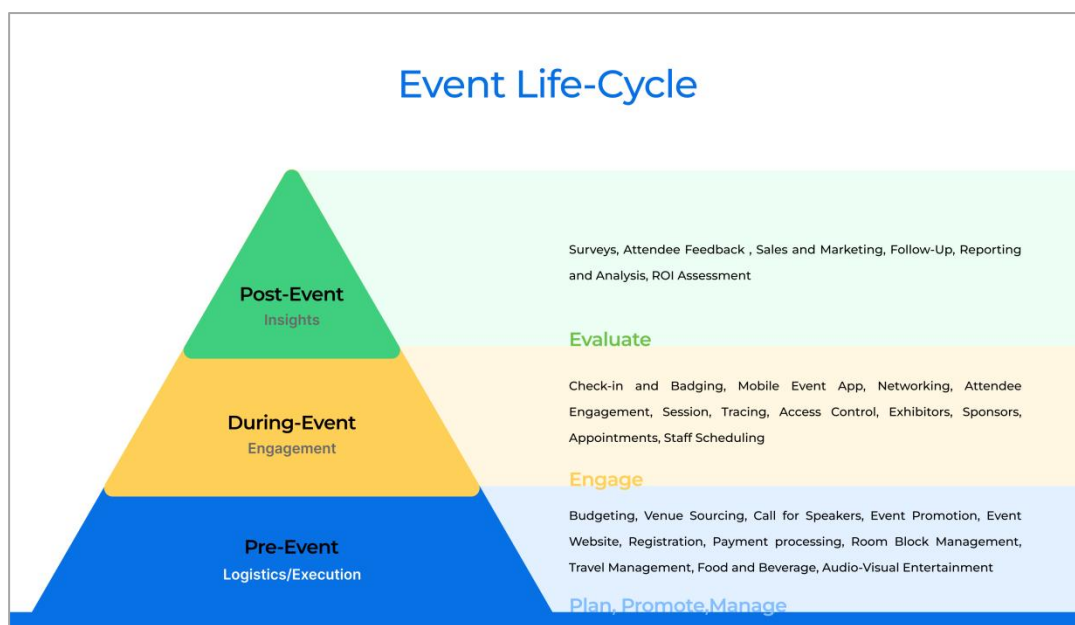


Figure 1.2: Event Life-Cycle; Source: Wiley, J. (2018). Event Management Technology for dummies

1.1.2 Event Technology

The different stages of the event discussed in the previous section shed light on how many of the mentioned tasks can be quite repetitive and time-consuming. This is where event technology can solve the problem by automating and simplifying the manual processes. Technology in event management saves time and improves the overall experience of the attendees (Mehrotra & Lobo, 2020). Event technology can increase event attendance by 20%, productivity by 27% and decrease costs by 20-30% as per the Frost and Sullivan report (Wiley, 2018).

To further emphasize the need for event technology consider the following scenario: Sam, an event planner is organizing a training offsite for her firm and she needs to find a venue.

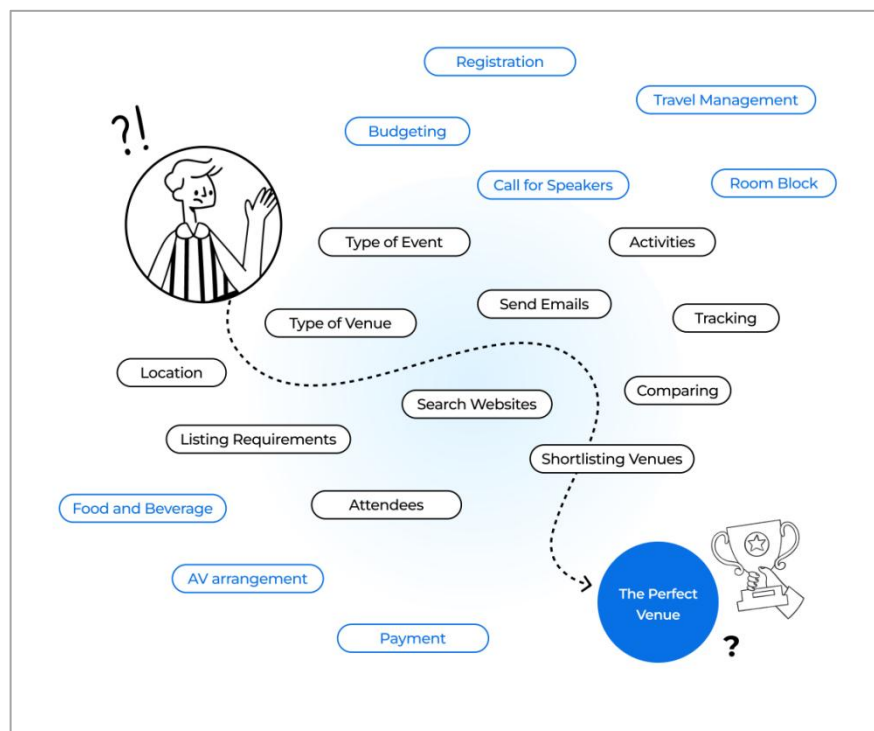


Figure 1.3: Scenario-Venue Sourcing

For the same, she begins by understanding the type and objectives of the event and proceeds to select the event location. This involves searching for suitable venues, browsing through various websites, sending emails, comparing options, and managing follow-ups through various forms of communication like emails and phone calls. Additionally, she also handles other logistical arrangements like catering, travel,

accommodation, etc. (Refer to Figure 1.3). However, in the absence of event technology, manually done tasks increase the likelihood of errors and result in unstructured and inefficient processes.

1.2 CVENT

As per the previous discussion, it is safe to conclude that event planning and management can be a very challenging and stressful experience for planners. The role demands effective time management, multi-tasking, and coordination with various stakeholders like vendors, suppliers, venues, etc. As per World Scholarship Vault (2022), event planning is the third most stressful job in the world. Cvent provides event planners and marketers with SaaS (software as a service) based solutions to automate various aspects of event planning, management and promotion. These solutions encompass online event registration, venue sourcing, event marketing, virtual, hybrid and on-site solutions and attendee engagement (CVENT IN, n.d). Cvent offers three comprehensive suites of solutions that streamline and simplify the entire event management process enabling organizers to deliver successful events, namely (Figure 1.4):

- Event marketing & management platform solutions
- Cvent exchange solutions
- Suppliers & Venues solutions

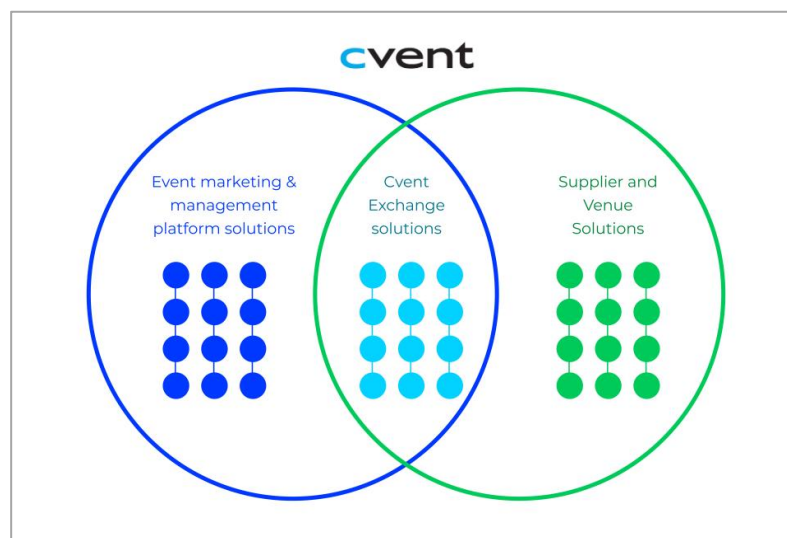


Figure 1.4: CVENT solution suites

1.2.1 Event marketing & management solutions

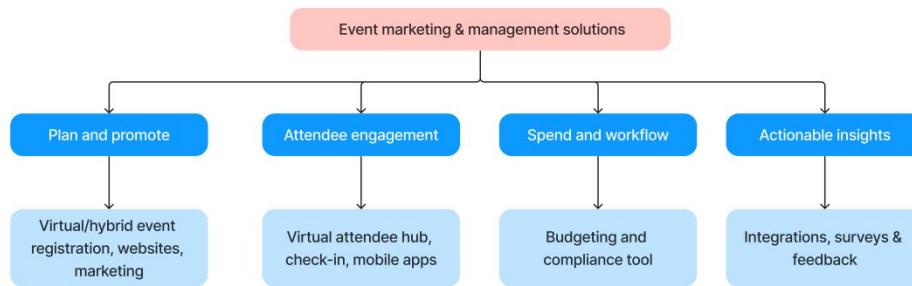


Figure 1.5: Event marketing & management solutions

Event marketing & management technology can streamline processes and help in realizing a successful events program. As per a recent study by Harvard Business Review Analytic Services, 93% of companies prioritize hosting events for customers and prospects. Furthermore, 50% of them consider events to be the most effective marketing channel (Wiley, 2020). Cvent's event cloud solutions cater to all types of events, in-person, virtual, hybrid, webinar, etc. Organizers can maximize attendee engagement and increase measurable ROI through this platform.

1.2.2 Exchange solutions

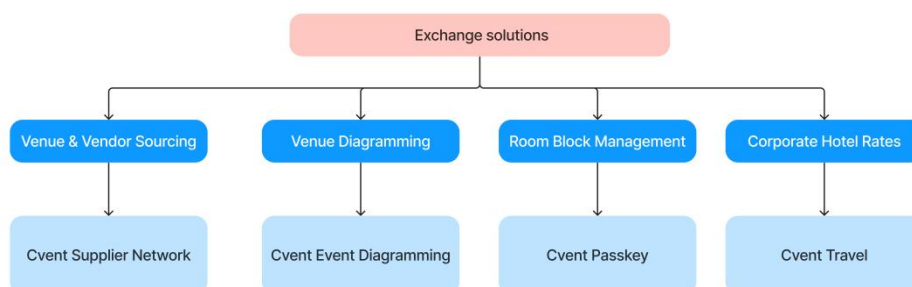


Figure 1.6: Exchange Solutions

Cvent's exchange solutions let planners and venues collaborate, ensure good planning and communication to fulfil key event requirements like venue sourcing, create event layout diagrams, automate hotel booking through room block management and manage transient travel programs.

1.2.3 Supplier and venue solutions

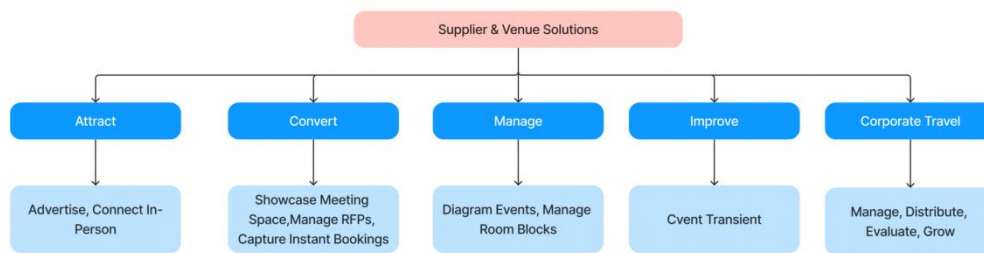


Figure 1.7: Supplier and Venue Solutions

The supplier and venue solutions provide access to Cvent’s extensive global sourcing networks where suppliers can showcase their venues or hotels to planners, convert leads in less time through upgraded custom proposals, and instant bookings, use Cvent diagramming to showcase the details of their venue space as well as get key insights into market conditions to assess their performance.

1.2.4 Navigating Event Life-cycle with Cvent

The Cvent SaaS platform offers event organizers a comprehensive solution for event marketing and management. It covers all stages of the event life-cycle, including planning, promotion, event-day and onsite operations, and post-event insights (Figure 1.8).

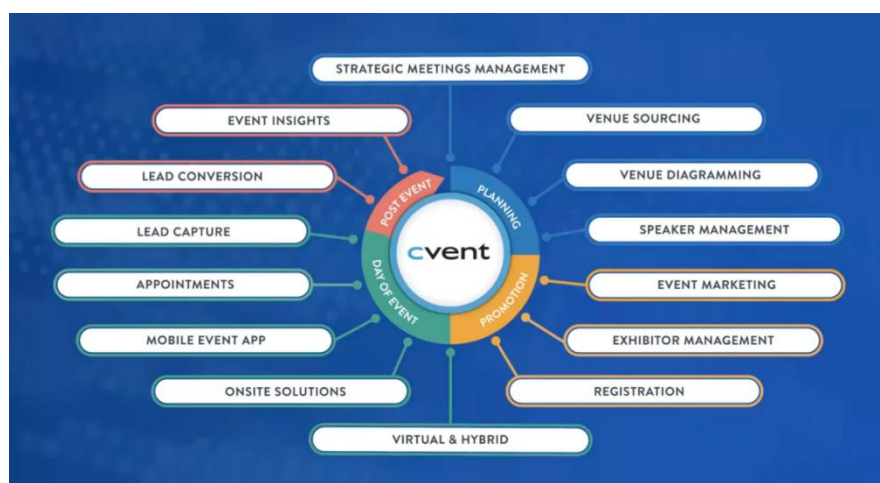


Figure 1.8: Navigating Event Life-cycle with Cvent

1.3 PROJECT BRIEF

1.3.1 Project Title

“Optimising the workflow for mid-market planners in the Cvent Supplier Network”

1.3.2 Aim

Identify and recommend solutions to optimise end-to-end workflow for mid-market planners in the Cvent Supplier Network.

1.3.3 Objectives

- Understanding the needs and challenges of mid-market planners in event planning and sourcing venues on the Cvent Supplier Network.
- Gain a comprehensive understanding of CSN-PHX products’ features and functionalities.
- Identify the gaps and friction points in the workflow of the MM planners in CSN.

1.3.4 Scope

The scope of this project will include understanding the mid-market planner persona and recommending solutions to improve the overall user experience by making it much more seamless, intuitive and easy to use resulting in improved adoption of the CSN Phoenix platform, more planner engagement, increase in conversion rates.

1.3.5 Expected Deliverable

- Mid-market planner Persona and Customer Journey Map.
- Innovative and practical solutions that enhance mid-market planners’ capabilities in sourcing and managing venues on Cvent’s platform.
- Prototypes that demonstrate ease of use while adhering to Carina design system guidelines.
- Creating responsive UI for different screen resolutions.
- Detailed Documentation of the process and outcome on Figma.

1.3.6 Methodology

The methodology followed for this project involved the following stages:

- **Discovery**
- **Define**
- **Ideate**
- **Design and Testing**

i. Discovery Phase

- To gain a deeper understanding of the project brief, the initial steps involved exploring the concept of the event planning process and gaining insights into the perspective of an event planner's roles and responsibilities.
- This was followed by gaining a comprehensive understanding of the features and functionalities of the CSN Phoenix, which is a new planner experience. The legacy experience is called Normandy, which is soon to be sunset. The approach involved mapping out the major workflows of CSN Phoenix.
- Another vital aspect of the project was to understand the mid-market planner persona, including their distinguishing factors, unique sourcing needs, preferences and challenges in comparison to the third-party planners, enterprise customers and occasional/casual planners.
- The mid-market space was relatively untapped with limited research available, therefore the approach involved gathering existing materials and resources available on Mid-market planners and extracting key insights from them. These insights were further validated through primary study which involved interviews with client-facing internal stakeholders at Cvent.

ii. Define Phase

The objective of the define phase was to formulate the re-defined problem statements by utilizing the insights obtained during the discovery phase.

- Initially, the primary research findings were categorized to come up with overarching themes. The data gathered from the interviews was transcribed, coded and thematically sorted. These themes were stack-ranked and prioritized based on the alignment of the number of stakeholders with those themes.

- Once the themes were finalized, inferences from each theme were drawn to understand and identify the underlying factors and patterns. This also formulated a high-level direction towards the possible solutions.
- The insights were used to create a mid-market planner proto-persona and a customer journey map.
- Based on the analysis, persona and journey map, the re-defined problem statements were formulated.

iii. Ideation Phase

- This stage began with brainstorming ideas to solve the given problem statements. The approach was to use mind maps as a visual tool for the generation and organization of ideas in a non-linear manner. This encourages a free flow of thoughts, enabling the exploration of potential solutions.
- To validate these ideas, an ideation workshop was organized with cross-functional teams involving participants from the UX, Product and Developers teams. The workshop involved a Crazy 8 team brainstorming session and discussion.
- The insights and ideas generated from the workshop were reviewed and analyzed through the process of affinity mapping. This involved grouping the related ideas from both the collaborative workshop and individual brainstorming.
- Post the affinity mapping process, the ideas were prioritized using criteria based on the desirability, functionality, and viability- DFV mapping.
- This thesis presents the outcomes from the ideation phase, including the recommendations and the possible design directions that emerged from the process.

iv. Design and Testing

- Going further, the next phase would involve getting accustomed to the Carina design system that is used to create the new CSN Phoenix experience.
- This will be followed by creating paper prototypes and low-fidelity prototypes, gathering input and feedback from the UX team, product managers, and developers to generate further explorations.
- Methods such as card sorting and dot-voting will be used to determine the most feasible solution.

- A fidelity prototype based on the results from the card sorting and dot voting will be created for concept testing.

1.3.7 Project Timeline

The project duration was from February 2024 to May 2024. All the design phases are listed in the timeline attached herewith.

Internship Project Timeline						Project: Optimizing Workflow for Mid Market Planners in CSN																
Project Duration: February 2024-May 2024						January				February				March				April				
Phase	Tasks	Tools and Methodology	Interim Notes/Remarks	Status	Week 1 8-Jan	Week 2 15-Jan	Week 3 22-Jan	Week 4 29-Jan	Week 1 5-Feb	Week 2 12-Feb	Week 3 19-Feb	Week 4 26-Feb	Week 1 4-March	Week 2 11-March	Week 3 18-March	Week 4 25-March	Week 1 1-April	Week 2 8-April	Week 3 15-April	Week 4 22-April		
PHASE 1																						
ONBOARDING	Documentation and Background Verification		Joining Documents/Bank Details/Background Security Check	Complete																		
	IT Asset Collection and HR Induction	Live		Complete																		
	Work Environment Setup	Live	Tools Setup: O365 Account Setup, Workday, Replicon, Zoom, Slack, Outlook, Figma, etc.	Complete																		
	Technology Training	Live / Zoom	New Hire Onboarding	Complete																		
	Attendee hub/ Live /			Complete																		
	NCK New Cventer Experience	Zoom	New Hire Onboarding	Complete																		
	Mandatory and Compliance courses	CLC	New Hire Onboarding	Complete																		
	Introduction / Meet & Greets	Live/Zoom	*Buddy and Mentor Connects	Complete																		
	Brief Introduction	Live/Zoom	Team Meet and Greets	Complete																		
	Product Training Introduction	CLC, Wiki	Event and HC Cloud	Complete																		
Figma Onboarding	Figma	Team Cards, New Hire Slide, Onboarding	Complete																			
1:1 Mentor Connect																						
KICK-OFF PRESENTATION February 2, 2024																						
Initial Timeline and Brief Overview																						
-Tentative Timeline																						
Documentation Progress / Stage of the Project																						
Brief Overview and Expected Deliverables																						
PHASE 2																						
Secondary Research																						
DISCOVERY	What?: Understanding of the Event Industry		Event Life-Cycle	High-level overview of the Event Lifecycle	Complete																	
			Event Planning and Management																			
			Ecosystem of a planner																			
			Practice of a planner/how they plan																			
	Who?: Target Audience/ Understanding the Personas			Mapping planner personas	Complete																	
			Desk Research, Wiki, CLC, Figma, Shared Resources	*Resources from the research team																		
	Product Training: What, Why and How of the product?			Understand where the Venue sourcing and RFP comes in the event cycle.	Complete																	
			Carina Design System	How is this phase affected by other steps in the cycle.																		
			CLC Training/Self Learning (Hospitality Cloud Products)																			
	Hands-on Product Onboarding			Connect with Buddy, Account Credentials to Access the product	Complete																	
Understand the problem space																						
Debriefing: Understanding of the Project Brief			This overview will be backed up by the insights gathered from the secondary research and product onboarding	Complete																		
What and Why? Understanding the problem space																						
-Aim and Objectives																						
Scope																						
Primary Research																						
Insights into Needs and Challenges of Planners			*Dependent on the Research / Product Team / Internal Stakeholders	Complete																		
		User Interviews																				
		Product Team Feedback from Audits/Research Insights																				
		Insights from Internal Stakeholders																				
		Qualitative Analysis: Deriving Themes	Inferences	Complete																		
		Current User Flow Maps		In Progress																		
Data Sources for Validation			*Data to Validate	Complete																		
		Client Listing System/App Support/Analytics																				
1:1 Mentor Connect																						
FIRST PROGRESS PRESENTATION March 8, 2024																						
Discovery Insights																						
-Initial Progress																						
-Adjustments in the original plan																						
-Redefined Brief based on discovery																						
PHASE 3																						
DEFINE																						
IDEATE	User Journey Mapping			Complete																		
	Developing Proto Personas			Complete																		
	Analysis and Insights			Complete																		
	Identification and Prioritization of Problem Clusters			Complete																		
Redefining the problem statement				Complete																		
Redefined Problem Statement/Opportunity Statement				Complete																		
1:1 Mentor Connect																						
Mid-Program Review 1 April, 2024																						
Discovery and Define Phase Insights																						
Possible Design Directions																						
-Primary Study Results																						
IDEATE	Brainstorming-Mapping the Ideas			Complete																		
	Crazy 8s Exercise / Workshop			Complete																		
	Affinity Mapping			Complete																		
	Discussion on Insights and Progress			In Progress																		
DFV Mapping				In Progress																		
				In Progress																		
DESIGN																						
Prototype Design	Paper prototype explorations	Hands-on/Pen/Paper		In Progress																		
	Iterations and Discussions	Sticky Notes, Figma		In Progress																		
		Meeting	*Discussion and Feedback																			
	Card Sorting / Dot Voting	Sticky Notes, Hands-on, Pen/Paper, Figma, Wiki		To Do																		
	Low Fidelity Wireframes	Figma		To Do																		
	Iterations and Discussions	Meeting	*Discussion and Feedback	To Do																		
TESTING																						
Usability Testing				To Do																		
Concept Testing		Figma	*Tentative: Participants Involved (Moderated/Semi-structured)	To Do																		
Iterations and Discussions		Meeting	*Discussion and Feedback	To Do																		
Final Product		Figma		To Do																		

Table 1.1: Project Timeline

CHAPTER 2:DESIGN PROCESS

2.1 DISCOVERY PHASE

The discovery phase is often the first step in approaching a design problem. As per the double diamond process, this is the phase where one diverges to delve into the problem space and collect relevant data to clearly define the problem that needs to be addressed.

In the previous chapter, we discussed the steps involved in event planning and how the use of event technology can automate tasks and simplify the work of event planners. We further expanded our understanding through a scenario where the planner is sourcing a venue. The next step is to become familiar with the venue sourcing process, particularly through the use of Cvent.

2.1.1 Venue Sourcing

Typically, venues often constitute a substantial cost element for an event (Wiley, 2018). It is not only financially significant but also time-consuming, requiring event planners to invest efforts in researching, visiting, and evaluating potential themes (Harding, 2023). However, choosing the right venue is crucial for a successful event as it sets the stage for the entire occasion (10 Considerations for Choosing an Event Venue | ICC Belfast, 2024). As per Wiley (2018), a planner can take into account the following aspects while selecting a venue or a destination:

- Type of event
- Location
- Travel arrangement
- Type of venue-No. of meeting room and sleeping rooms
- Budget

Once the above-mentioned criteria are set, let's examine how the planner might use the Cvent Supplier Network (CSN) to source venues.

2.1.2 Cvent Supplier Network (CSN)

The Cvent Supplier Network is a platform that automates the venue-sourcing process. CSN provides planners with an online database of more than 234,000 venues or supplier listings. Essentially, CSN acts like a marketplace where planners can search for suitable venues for their meetings and events, while suppliers can showcase their services and enhance their business exposure.

i. Planners

Planners initiate the process by sending requests for Proposals (RFPs) to venues with the details of their events. The venues respond by submitting proposals, which are evaluated by the planner to select a suitable venue. Planners use the system to:

- Find Venues
- Add/Send RFPs (Request for proposal)
- Book Business

ii. Venues

Venues use the CSN to promote their properties to meeting planners. The suppliers/venues use the system to:

- Respond to RFPs
- Track past proposal statistics
- Purchase marketing packages (Diamond listings)

2.1.3 CSN Phoenix: New Experience

CSN Phoenix is the new planner experience that replaces the previous **Normandy experience**. Normandy offered different RFP types, such as advanced RFP, Quick RFP, and Restaurant RFP. However, the new Planner experience combines all these RFP types into a single combined RFP that allows planners to capture the event information as extensively as they used to do in Normandy.

Business Goals and Reasons:

- **Increase planner and supplier adoption**

The main objective of Project Phoenix is to increase adoption and planner engagement on the Cvent Supplier Network. This would result in a higher volume of RFPs being generated through the network, consequently driving more revenue for the platform.

- **Increase customer satisfaction**

Enhancing the usability, efficiency, and accessibility of the system to increase the customer satisfaction of the platform. This, in turn, will result in increased repeat usage by planners, improved response rates from suppliers on the network, and positive interactions between the users, client success and sales teams. Additionally, incorporating new functionalities that cater to the user's needs, prevents them from having to leverage other systems or processes.

- **Reduce support costs**

Implementing simplified and intuitive user interfaces for users to easily navigate and utilize the platform without the need for extensive training or frequent assistance from the client success teams. This will result in reduced support costs for the clients as well as Cvent. The aim is to streamline workflows related to sending and re-sending RFPs, while also introducing new features or enhancements to minimize customer frustrations and decrease the number of interactions with the CS teams or the need to escalate data fixes to app support.

- **Reduce Maintenance and Enhancement Costs**

In the current tech stack, adding new functionalities can be very cost-intensive when catering to the needs of the customers for an efficient venue-sourcing experience. In addition to the improved user experience, scalability and sustainability are vital. This will enable investments in the network in a more agile and efficient manner compared to the limitations of the old experience, Normandy.

2.1.4 Product On-boarding: CSN Phoenix

The process of product onboarding began with acquiring knowledge about CSN through wikis (Cvent's knowledge base), and CLC training sessions (computer-based training), which eventually progressed to Hands-on learning. *Figure 2.1* depicts my initial understanding of the CSN product.

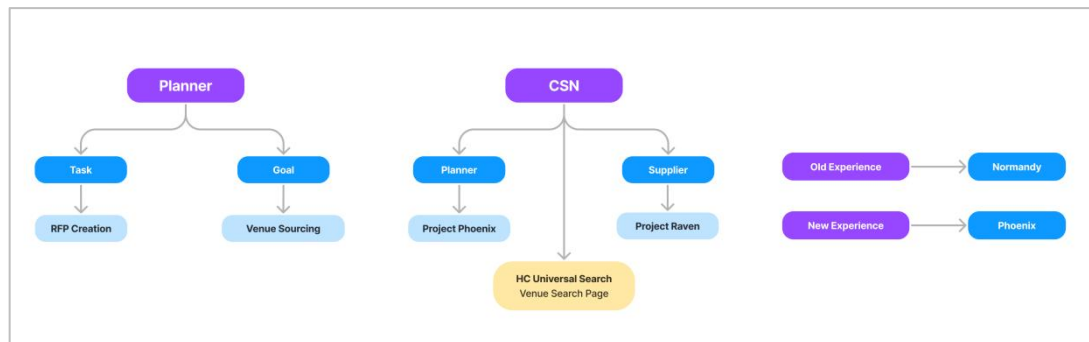


Figure 2.1: Initial Product Understanding

2.1.5 Screen Mapping

For hands-on product learning, the method of screen-mapping was used to understand 4 major workflows on CSN Phoenix. This included visual documentation of the screens and interactions involved in the specific workflows. It served as an effective tool for analyzing the layout, features, and information presented on each screen.

My approach involved going through the screens and mapping them with emerging observations or questions regarding any feature or step. Some of the examples have been presented below.

The 4 mapped workflows include:

- Create RFP
- Copy RFP
- Send RFP
- Award RFP

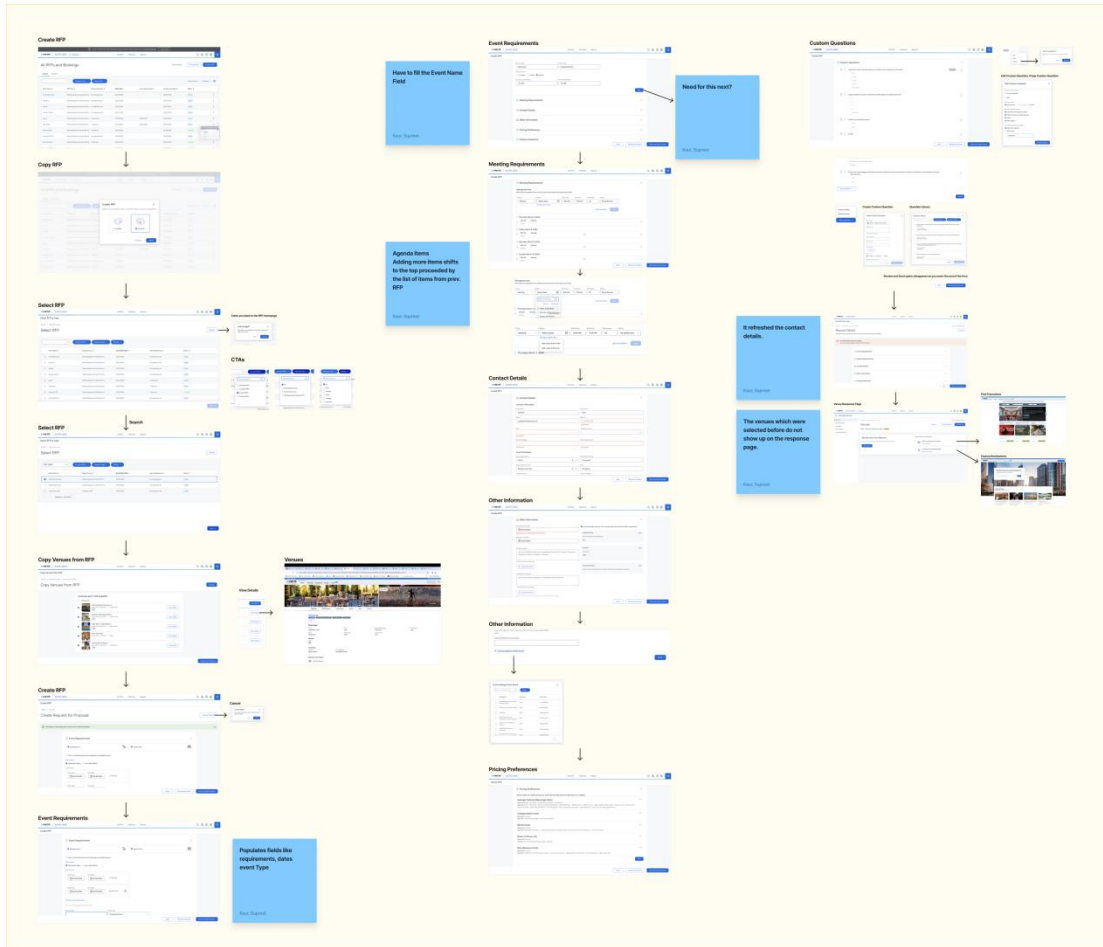


Figure 2.2: Copy and Create RFP Flow

Figure 2.2 illustrates the Copy and Create RFP flow, which commences from the RFP list page followed by a selection of the “Copy RFP” CTA. Upon selecting an RFP from the existing list, the RFP form is filled out by providing the remaining details relevant or unique to the given meeting or event. The copy RFP feature is beneficial for scenarios where the event is recurring, and significant details can be retained.

2.1.6 Creating RFP

RFP, a request for proposal is a official document that is used by an organization to get bids from potential suppliers or vendors for a product or a service. The Cvent’s RFP form is used by planners to find suitable venue proposals. The RFP form is divided into different sections. Some of the sections have been listed as follows:

- **Event Requirements**

Users can enter primary requirements for an event, including meeting and guest rooms, event dates, type, format, and number of attendees.

- **Meeting Requirements**

In this section, the planner can add event agenda items to inform the venue about the event space requirements. The fields include agenda type, dates, time, setup and number of attendees. It also includes additional meeting requirements such as specifying the room size, and the number of peak and total meeting rooms needed.

- **Guest Room Requirements**

The guest room requirements section offers planners the flexibility to edit guest rooms by the day or edit guest rooms together. This allows them to add the desired number of rooms needed per night, and specify the type of room and the occupancy.

- **Contact Details**

Here one needs to add contact and host information.

- **Other Information**

In this section, the response due date and decision due date for the event are added. The planner can also specify decision factors if any, budget, commission, and billing details.

- **Pricing Preferences**

This section allows the planner to select the items they need pricing for from the suppliers. They have the option to mark the remaining items as '*optional*' or '*not needed*'. Example: Food and Beverage, Transportation, Rental, Move-in/Move-out, etc.

- **Custom Questions**

These are the questions that planners can ask the venues to get more clarity around any aspect related to the venue.

The given sections have collapsible accordions, providing the user flexibility as depicted in *Figure 2.3*.

The screenshot shows a form with four main sections, each with a numbered header and a collapse/expand arrow:

- ① Event Requirements
- ② Meeting Requirements
- ③ Guest Room Requirements
- ④ Contact Details

The Contact Details section is expanded and contains two sub-sections:

- Contact Information:**
 - * First name: Input field with value "Supreet"
 - * Last name: Input field with value "Kaur"
 - * Email: Input field with value "supreet.kaur@cvent.com"
 - * Phone: Input field with value "+1 111-111-1111"
 - * City: Input field
 - State/Province: Dropdown menu
 - * Country/Region: Dropdown menu
 - * Your organization: Input field
- Host Information:** (This section is currently collapsed)

Figure 2.3: RFP form sections

After the user flow through screen mapping was understood, a flowchart was created to provide a high-level overview and visualization of the process (*Figure 2.4*)

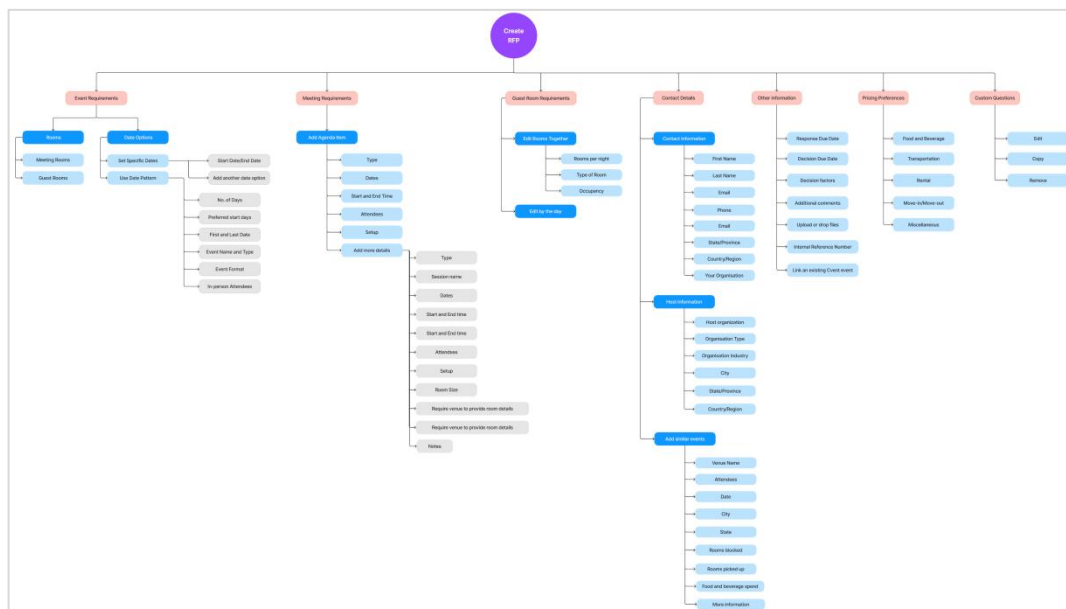


Figure 2.4: RFP Form Flowchart

2.1.7 Venue Response Page

Once the RFP form is created and sent to the venues, the user can track the responses from the Venue Response Page. *Figure 2.5* is a preview of screen mapping for the venue response page, showcasing the process of sending and awarding the RFP flow followed by a flowchart visualization (*Figure 2.6*).

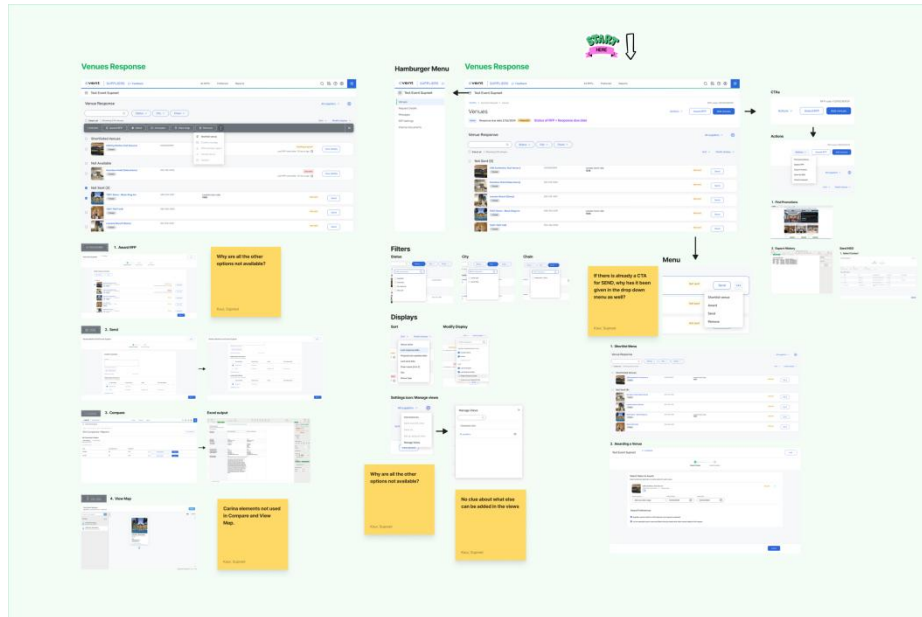


Figure 2.5: Venue Response Page-Send and Award Flow

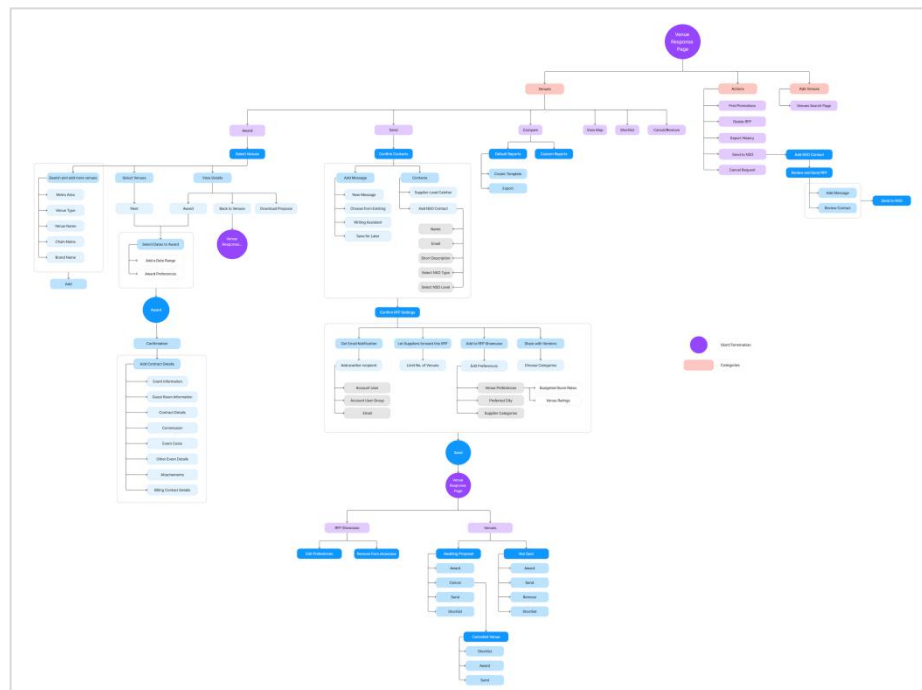


Figure 2.6: Venue Response Page Flowchart

2.1.8 Understanding Personas


The CSN platform serves a diverse planner persona, which includes Enterprise Planners, Third Party Planners and Occasional/Casual Planners. However mid-market customer segment has been relatively unexplored. For this project, it was essential to gain an understanding of the significant differentiating factors, their unique needs and challenges.

Existing Personas

Initially, the existing event cloud mid-market personas were analyzed. A summary was noted for each persona capturing the common observation across all of them. This approach was useful to gain insights into some of the important characteristics.

Key takeaways:

- Efficiency is paramount as mid-market planners wear many hats and have to juggle between a lot of tasks and responsibilities.
- Simple and easy-to-use platform for a user-friendly experience.
- Require assistance when using new technology.



Buyer Persona – Casual Event Planner, SMB (Corporation)
Persona Name – Sarah

My Purchasing
Purchase Role: **Sponsor, Decision Maker**
Buying Center: Marketing
Buying Process: Research, File criteria, Influencer or Significance credit card
Main Product/Relation: **Event Planning, Marketing & Registration, Check-in & Bagging, Mobile Event Apps, Support**

My Location:
• Registration form, online registration form, web form, **event registration, event planning, event management**

My Motivations
• Need to be more focused on **features and functionality**
• Seeking to improve attendance of events
• Seeking to improve **attendee engagement and satisfaction**
• Responsible for all aspects of the event and **take many pain points**
• Gets input from other team members during the event process

My Job Responsibilities
Responsible for:
• **Managing all company and client events**
• **Working with other team members to meet objectives**
• **Supporting others in the company with projects on an ad-hoc basis**

Face these problems:
• I am responsible for wearing many hats within the organization and have to juggle with several different projects at a time
• **My budget is small and I have to be very resourceful**
• **Because I'm a small firm, I'm not complex for me**
• **I need more time to make my own decisions to know what's best for my business**

Buyer Needs:
• **Increase efficiency – save time**
• Easy-to-use UI for team, volunteers, and others to use
• Fits into my budget – the cost per registrant doesn't break the bank
• Reporting dashboards to easily report to stakeholders

May not make decisions because:
• I am not the decision maker. For associations, need board or chapter approval
• **Need to be able to quickly and easily read all the bells and whistles**
• My customer doesn't have my absolute expertise, but the program is the best and I have to be able to make decisions
• **It's hard to find a tool that works with my budget**

May back out because:
• This is a decision that I will only my head to buy
• Lack of budget
• It's too complicated to adopt, for both me and the company's clients
• **Integration and third party tools**
• **It's a hard technology to learn**
• It's hard to sell to my superiors or board

Casual Event Planner | SMB

- **Role:** Marketing | **Title:** Executive Assistant
- Small Company and Office Events
- Success: Attendee and Manager satisfaction
- "Responsible for wearing many hats"

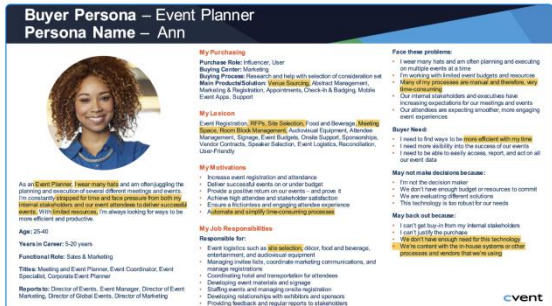
Summary

- Simple and Easy-to-Use Tool/ UI
- Faster-Increase Efficiency and save time
- Basic Features and Functionality: No need of bells and whistles
- Uses Manual Processes if it's too complex
- Need one-on-one help when it comes to technology and learning it.

May Back out because:

- Late technology adopter/ Stubborn
- No Budget
- Lack of Necessity

Figure 2.7: Casual Event Planner Persona | SMB



Buyer Persona – Event Planner
Persona Name – Ann

My Purchasing
Purchase Role: Influencer, User
Buying Center: Marketing
Buying Process: Research, and rely with selection of consideration set
Main Product/Relation: **Event Planning, Revenue Management, Marketing & Registration, Appointments, Check-in & Bagging, Mobile Event Apps, Support**

My Location:
Event Registration, **WiFi, Site Selection, Food and Beverage, Meeting Space, Event Management, Multichannel Engagement, Management, Storage, Event Budgets, Onsite Support, Sponsorship, Vendor Contracts, Operator Selection, Event Logistics, Registration, User Privacy**

My Motivations
• Increase event registration and attendance
• Deliver successful events on or under budget
• Provide a positive return on our events – and grow it
• Achieve high attendance and stakeholder satisfaction
• Create a **high-quality and engaging attendee experience**
• **Improve my productivity and time-consuming processes**

My Job Responsibilities
Responsible for:
• **Event logistics such as site selection, floor, food and beverage, entertainment, and audience management**
• **Managing vendor fees, coordinate marketing communications, and change registration**
• **Coordinating with other departments for attendees**
• **Developing event materials and signage**
• **Drafting events and managing on-site registration**
• **Developing relationships with exhibitors and sponsors**
• **Providing feedback and regular reports to stakeholders**

Face these problems:
• I wear many hats and am often planning and executing multiple events at a time
• I'm working with limited event budgets and resources
• **Many of my processes are manual and time-consuming**
• **Manual processes and manual data have increasing expectations for our meetings and events**
• Our attendees are expecting smoother, more engaging event experiences

Buyer Needs:
• I need to find ways to be **more efficient with my time**
• I need more time to make my own decisions
• I need to be able to easily access, report, and act on all our event data

May not make decisions because:
• I'm not the decision maker
• We don't have enough budget or resources to commit
• We are waiting on other solutions
• This technology is not built for our needs

May back out because:
• I can't get input from the internal stakeholders
• **I don't justify the purchase**
• **We don't have the need for this technology**
• **It's not enough to meet our needs**

Event Planner

- **Role:** Sales and Marketing | **Title:** Meeting and Event Planner
- Meetings and Events, Site Selection
- "Wears many hats and always juggling between planning different meetings and events"

Summary

- Always strapped for Time and pressure from Internal Stakeholders/Attendees.
- Automate and simplify time-consuming processes.
- More Efficiency with time
- Manual Processes are very time-consuming

May Back out because:

- Limited event budget and resources/Cant justify purchase
- Not enough need for this technology
- Content with the in-house systems or other processes and vendors.

Figure 2.8: Event Planner Persona

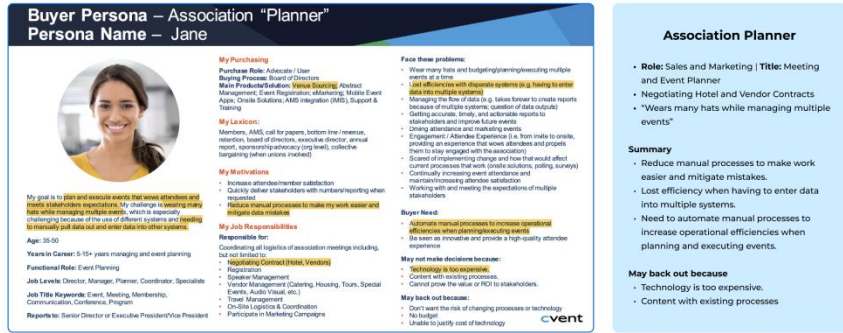


Figure 2.9: Association Planner

The pre-existing personas for the enterprise planners and sourcers were studied as well, although these were not mid-market specific.

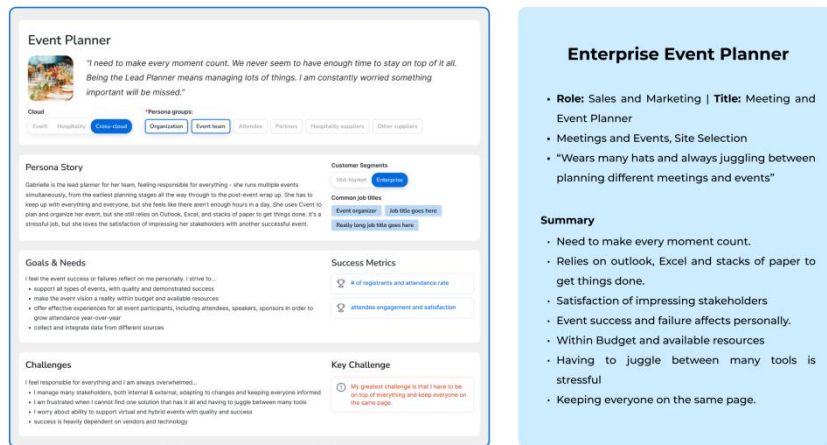


Figure 2.10: Enterprise event planner

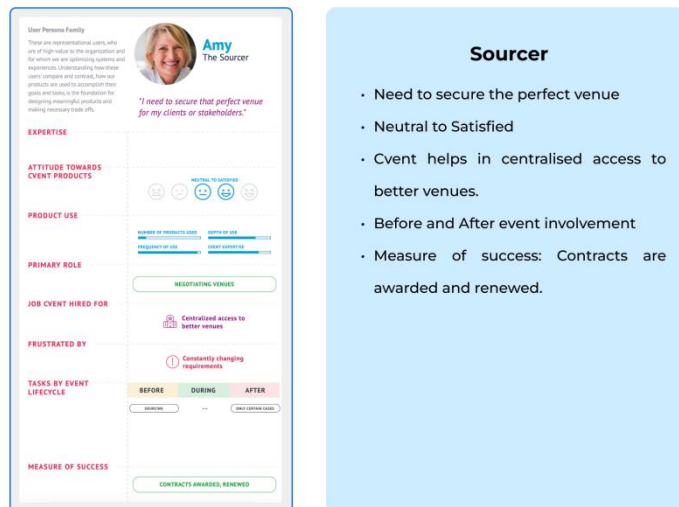


Figure 2.11: Sourcer Persona

2.1.9 Primary Research

To further reinforce and expand upon the findings obtained from the secondary research, the primary study was conducted, which involved interviews with client-facing internal stakeholders at Cvent.

Research Plan

i. Goal

To comprehensively understand the Mid-Market Planner Persona.

ii. Objectives

- Identify key pain points in the workflow of mid-market planners when using the CSN.
- Understand how MM Planners use CSN functionalities and features.
- Understand the key differentiators for mid-market customer persona from other customers (Enterprise/TPP/Casual Planners).
- Gain insights into the unique sourcing needs of mid-market customers.

iii. Outcome

Mid-market planner persona and customer journey map for venue sourcing.

iv. Method

The research involved conducting unmoderated interviews and discussions with internal stakeholders of Cvent.

v. Internal Stakeholders

Product Managers

- Ratul Saha: Director, Product Management
- Allie Hanneschlager: Principle Product Manager

Sales

- Laura Puglisi: Senior Director, Sales, Sourcing and Housing Solutions

- Catherine Yoo: Account Manager, Sourcing and Housing Solutions | MM Representative
- Olivia Murray-Taylor: Regional Sales Director, Sourcing and Housing Solutions | MM Representative

Client Success

- Caleb Conrad: Senior Manager, Client Success
- Stefani Sciametta: Team Lead, Client Success
- Sonali Mahar: Senior Client Success Advisor
- Sean Tomlian: Senior Solutions Lead, EC

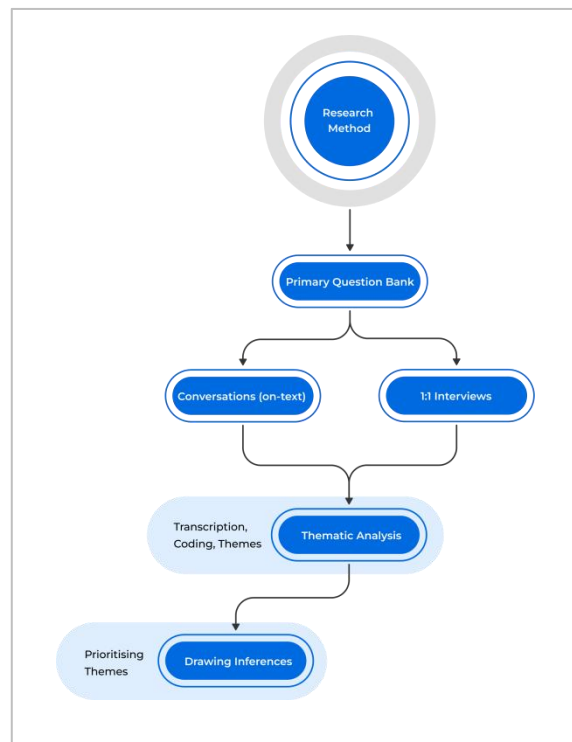


Figure 2.12: Primary Research Method

vi. Question Bank

The series of questions that were used to gather information and insights from the participants:

- How do we define a mid-market customer/planner? What are those parameters?
- How can we highlight the uniqueness in the process of a mid-market customer/planner from an enterprise/TPP/occasional planner? Do we think of

mid-market planners in a specific way in terms of sourcing/RFP volume/usage or How they might be trained for sourcing?

- Do mid-market planners demonstrate a willingness to invest in product training? Which specific feature do they require the most assistance with/face challenges?
- What are the major feedbacks from planners regarding product features or areas that slow them down in terms of efficiency and time management while creating RFPs and sending/awarding RFPs?
- In terms of purpose and scale, what are the typical types of events that mid-market planners usually organize?
- What are the features they use the most? Any positive feedback regarding the same that they like the most?
- Are there any potential issues or challenges that arise during supplier and planner collaboration at various touch points within the venue sourcing life-cycle?

vii. Interview Snapshots

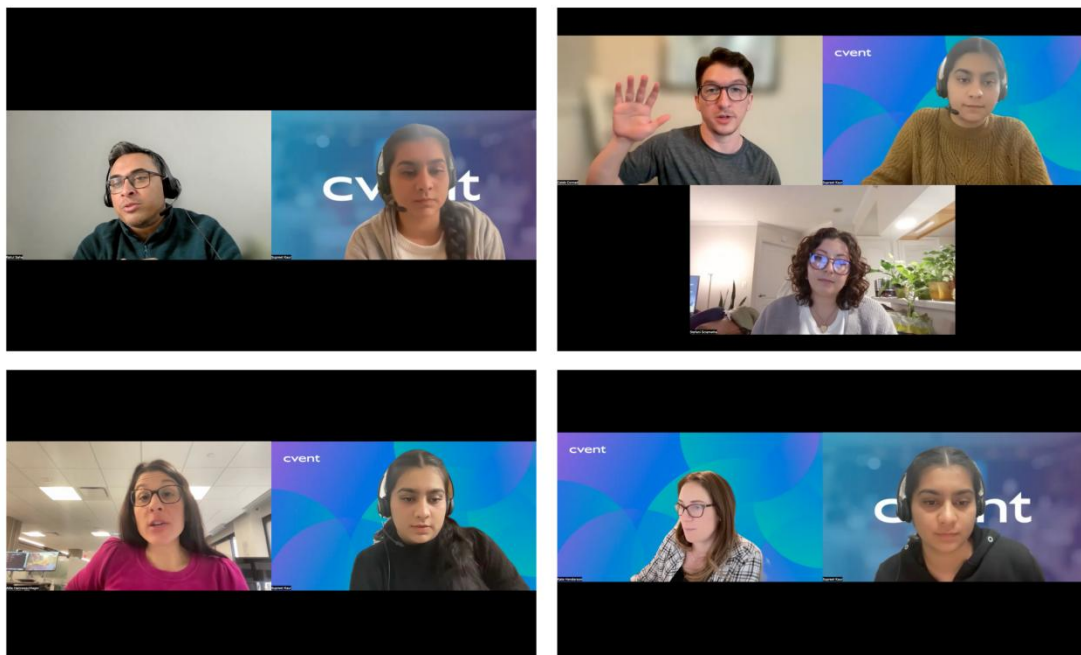


Figure 2.13: Stills from the Interviews/Connects

2.1.10 Primary Study Findings

Some of the key findings regarding mid-market planners that emerged during discussion with the stakeholders are as follows:

- **Mid-market planners** can be referred to with terms like ‘free planner’, ‘direct planner’, or ‘free planner’. This simply means that a mid-market planner is someone who is planning directly for the organization.
- **MM (mid-market) planners** tend to wear multiple hats and share multiple responsibilities. This means they do not have a dedicated meeting and event sourcer in the teams.
- To differentiate MM planners from others, one can take different perspectives. One of them is the **Product Perspective**. Here, RFP volume and product usage is the tool. MM planners tend to drive a very small volume of RFPs from the system. They are within the system only 10-15 times a year and the amount of time spent is also only a few hours a day.
- Another one is the **sales perspective**. Mid-market customers to business mean anyone that does under \$750M in revenue. The organization size is small, which means only 1-3 planners on their teams. This also results in smaller organizational programs/processes.
- Lastly, there’s the **vertical approach**. This is categorization based on **different segments**. There are Third-party planners, planning on behalf of other organizations. Then there are enterprise planners who are also called corporate planners, usually falling into segments like financial service, life sciences and technology.
- Then there is G-A-N-E, i.e. Government, Association, Non-Profit and Education. The majority of the G-A-N-E accounts fall into the mid-market space. *(There might be a few scenarios where mid-market customers with higher dollar value might be categorized as corporate customers due to overlapping characteristics.)*

- Cvent offers three types of venue sourcing packages: **Starter, Elite, and Enterprise bundle**. The majority of the mid-market planners leverage the starter bundle which includes three paid features: **NSO contacts, RFP preference, and Custom Questions**. It is roughly at a price point of **\$5000**.

To gain a better understanding, let's draw a comparison mid-market and enterprise planners. Refer to *Table 2.1*.

Enterprise Planners	Mid-Market Planners
They are power users who have a large sourcing volume, driving a large number of RFPs from the system.	They are in the middle ground. The sourcing volume is low.
Spend 8 hrs/day within the system	Spend only a few hours a day and are within the system only 10-15 times a year.
2 to 3K accounts but drive 70% of Cvent's revenue.	20 to 30K accounts but low revenue.
Have active client success representatives	Do not have active client success representatives.
Access to More Features, Functionalities and Support.	Lack of support and less powerful voice.
More POCs across individual products.	They are not aware of all the tools and functionalities. They are sold the efficiencies that CSN can offer.

Table 2.2: Enterprise v/s Mid-Market Planners

2.1.11 Mid-market Planner Accounts

- Many customers who fall under the mid-market category have the ability to turn into enterprise-level accounts in the future.
- The volume of these accounts is large, hence the system must be fine-tuned to cater to their needs as well.

According to data from Cvent’s Client Listing System, there are approximately 25,000 G-A-N-E mid-market accounts, out of which only 10,000 accounts are paid. As these accounts are using a basic license module and generating a low volume of RFPs, it is not feasible to have an active client success representative for these accounts as it would not be profitable.

2.1.12 Thematic Analysis

To gain meaningful insights from the data collected during the primary study, a thematic analysis was conducted. The data collected from the interviews was transcribed, coded, and sorted thematically to identify overarching themes.

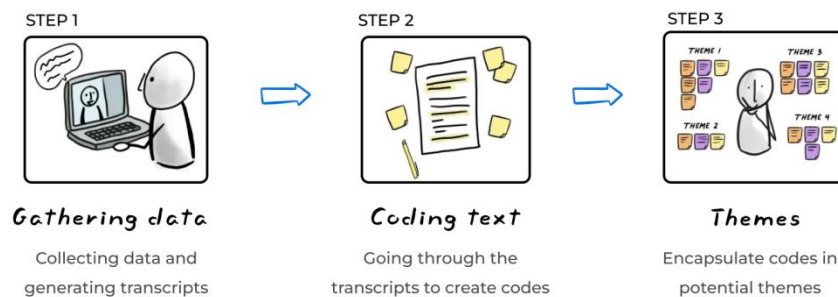


Figure 2.14: Thematic Analysis Process

Figure 2.15, Figure 2.16, and Figure 2.17 depict how the transcribed data was coded and summarized.

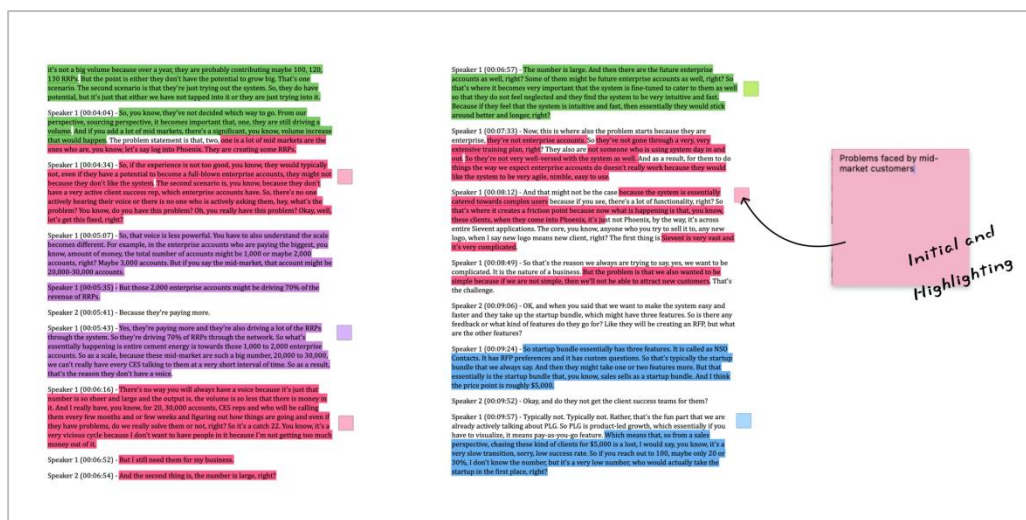


Figure 2.15: Coding Data

Connect with Allie
Principle Product Manager

Transcribing and Coding

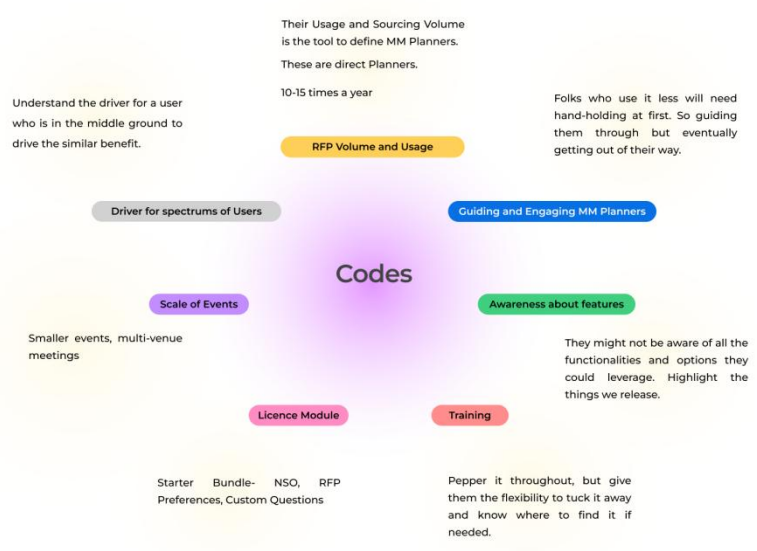
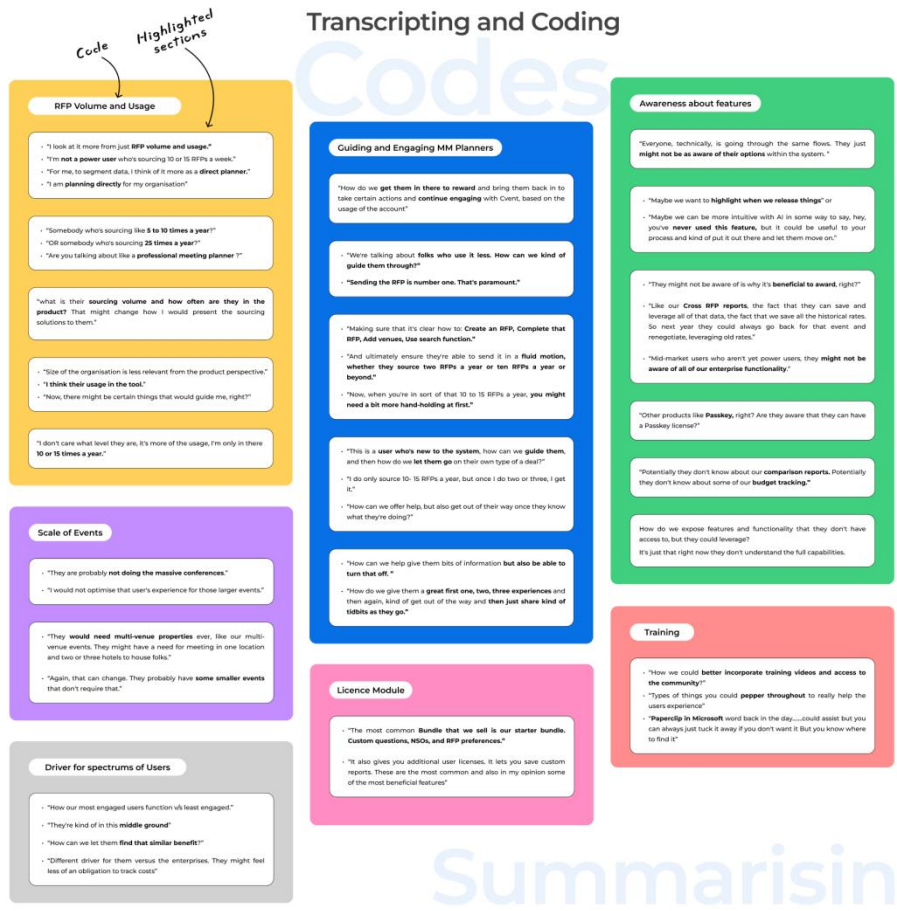


Figure 2.16: Coding and Summarizing (Example 1)

Connect with Ratul

Director, Product Management

Transcribing and Coding

Code Highlighted sections

Big Clients and Business/PLC

For Big clients,

- A lot of sourcing is happening through my Cvent.
- As a result, I would need to have a lot of features, functionalities and support.
- So, I don't really mind paying money to Cvent.

For Big clients,

- These clients are also someone who use the system day in and out, there are people who are probably using the entire system 8 hours a day
- Client Success rep is aligned as a channel. So, if any problem happens, they have a hotline, raise a complaint, we'll also be proactive in terms of fixing it.

For Mid Market Planners,

- From a sales perspective, chasing these kind of clients for \$5,000 is a loss.
- It's a very low success rate if a salesperson or CS/marketing person has to chase these customers vs. the same energy on maybe one or two enterprise accounts.

- We want to do more with less resources.
- An option is to chase all the big accounts. But then what happens these small accounts?
- I still need them for my business.

Pay-as-you-go

- Should be able to buy the startup bundle online, and sign up automatically.
- Cut down on chasing unless you see potential.

RFP Volume and Usage

- They are sending RFPs through the system, but it's not a huge volume.
- They might be spending a few hours a day or 10 to 15 RFPs in a month.
- It's not a big volume because over a year, they are probably contributing maybe 100, 130, 130 RFPs.

- Scale becomes different. Enterprise accounts who are paying the biggest amount of money, the total number of accounts might be 1,000, 2,000 or 3,000 accounts.
- But if you say the mid-market, that account might be 20,000-30,000 accounts.

- But those 2,000 enterprise accounts might be driving 70% of the revenue of RFPs.
- Yes, they're paying more and they're also driving a lot of the RFPs through the system.

Voice

- When we get our prod bugs, we say it's a platinum client, silver tier client, and so on.
- It's a platinum tier client, I need to fix it right away.
- So, all these clients have a voice, in short, right? There's that proactiveness.

For MM Clients

- They don't have a very active client success rep, which enterprise accounts have.
- So, there's no one actively hearing their voice or there is no one who is actively solving their problems.
- Voice is less powerful.

- Cvent energy is towards those 1,000 to 2,000 enterprise accounts.
- Because these mid-market are such a big number, 20,000 to 30,000, we can't really have every CES talking to them at a very short interval of time.
- Number is so sheer and large and the output volume is so less in terms of money.
- So as a result, that's the reason they don't have a voice.

- For 20-30,000 accounts, CES reps who will be calling them every few months and or few weeks and figuring out how things are going and even if they have problems, do we really solve them or not, right?
- It's a very vicious cycle, I'm not getting too much money out of it.

Licence Module

- Free planners/Mid-market planners.
- Mid-market planners are people/companies who are going through the procurement process.
- They have contacted sales and done a contract with us, they might have just bought the startup pack.
- Licensing module within enterprise accounts have roughly 10 features or more.

- Typically, mid-market take the startup bundle, which means there are three features that they take.
- The license is very minimal, \$2,000 to \$5,000, \$10,000 or so.
- They might take more, add that to the price and so on?
- So, essentially, they are paying a price, but it's not a very huge amount.

- Startup bundle essentially has three features.
- It is called as NSO Contacts, RFP preferences and Custom questions.
- The price point is roughly \$5,000.

User Experience

- If the experience is not too good, even if they have a potential to become a full-blown enterprise accounts, they might not because they don't like the system.
- The system is essentially catered towards complex users.
- That's where it creates a friction point.

- They're not enterprise accounts. They've not gone through a very, very extensive training plan.
- They also are not using system day in and out.
- So they're not very well-versed with the system as well.
- And as a result, for them to do things the way we expect enterprise accounts do doesn't really work because they would like the system to be very agile, simple, easy to use.

- Cvent is very vast and it's very complicated. It is the nature of a business.
- But also we want it to be simple to attract new customers.

- RFP is too complex and it's too long. So, it takes time to build it and send it. And as a result, a lot of planners don't like our application to enter it.
- It is also not a simple one-step thing because there are steps to it.
- You create an RFP and then you find the venue and then you send it to a venue and each venue sending also has its own layer of complexities to it.
- So, understanding what needs to happen, what doesn't need to happen, too many validations.
- How do we unblock yourself for those validations?

3 Major Pain Points:

- Form is lengthy, complicated.
- Not enough trained/well-versed.
- Don't understand what has changed.

Training

- They don't want to do a training because it's something that they don't want to make time out of.
- Training in a very big enterprise account, is much more controlled because we have a CS on our side.
- Typically, they have their own internal training programs. There's a lot of you know, availability of time and bandwidth.

- That's not the case with the mid-market. A mid market customer might only have three planners in it.
- And then after a few months, someone resigned and then someone new came in. Who enforces the training?
- They don't create in large volume and don't want to invest time in it.
- It is not their daily bread and butter.

Custom Questions

- Planners do need to enter all their custom questions because they want to ask more and more questions to the hotels.
- Which makes it even harder for the venues because now they have to answer so many questions.
- The events are typically small, 20 meeting rooms, 20 guest rooms, two-day event. But if you ask 70 questions in that. They get lower response rate. So that's another friction site.
- Venues don't want to spend that much energy in responding to it because that might be a small venue who doesn't have too much of staff.
- Not going through process of responding to 70 questions and manually.

- And typically a venue should not take more than 48 hours.
- Typically, diamonds have good response rate.

Potential

- Either they don't have the potential to grow big.
- The second scenario is that they're just trying out the system.
- So, they do have potential, but it's just that either we have not tapped into it or they are just trying it out.

- From sourcing perspective, it becomes important that, one, they are still driving a volume.
- And if you add a lot of mid markets, there's a significant, you know, volume increase that would happen.

- The number is large. And then there are the future enterprise accounts as well.
- It becomes very important that the system is fine-tuned to cater to them as well.
- so that they do not feel neglected and they find the system to be very intuitive and fast, then essentially they would stick around better and longer, right?

Variety of Tasks

- Mid-market planner is a true planner.
- They are probably doing a much more variety of things within that event and not only just creating an RFP.
- But you're also probably going to the venues, talking to the venues.
- You're probably trying to understand the agenda.
- You're talking to the client to understand what needs to be there in the event.
- You're talking about foods and catering.
- Attendees, Rooms, etc.
- So, creating that RFP should be a least of a time-taking thing. So, the longer it is, the more frustrated you get.

Figure 2.17: Coding and Summarizing (Example 2)

Once all the data was coded, similar codes were grouped together under a common theme. The overarching themes have been presented in *Figure 2.18* and *Figure 2.19*.



Figure 2.18: Themes-I



Figure 2.19: Themes-II

The themes were prioritized and stack-ranked based on the number of stakeholders aligned with them (Refer *Figure 2.20*, *Figure 2.21*, and *Figure 2.22*)

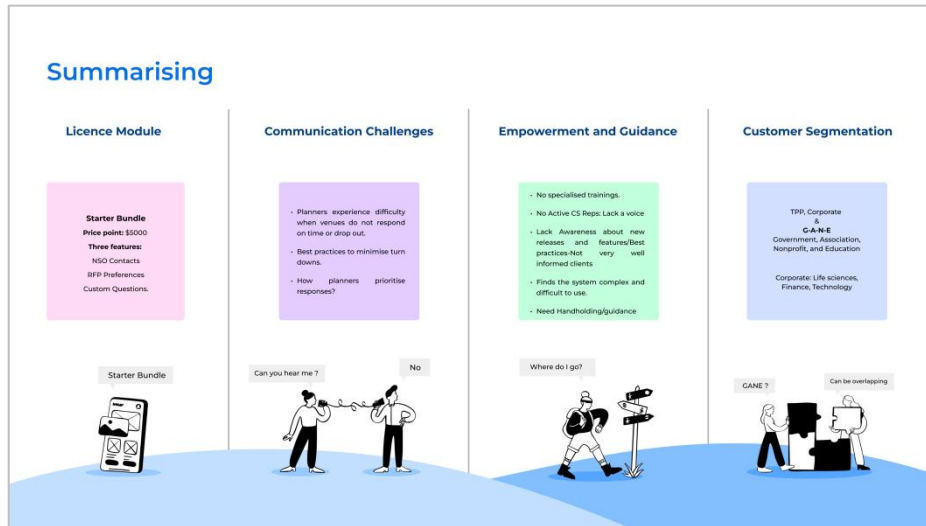


Figure 2.20: Summarised Themes-I

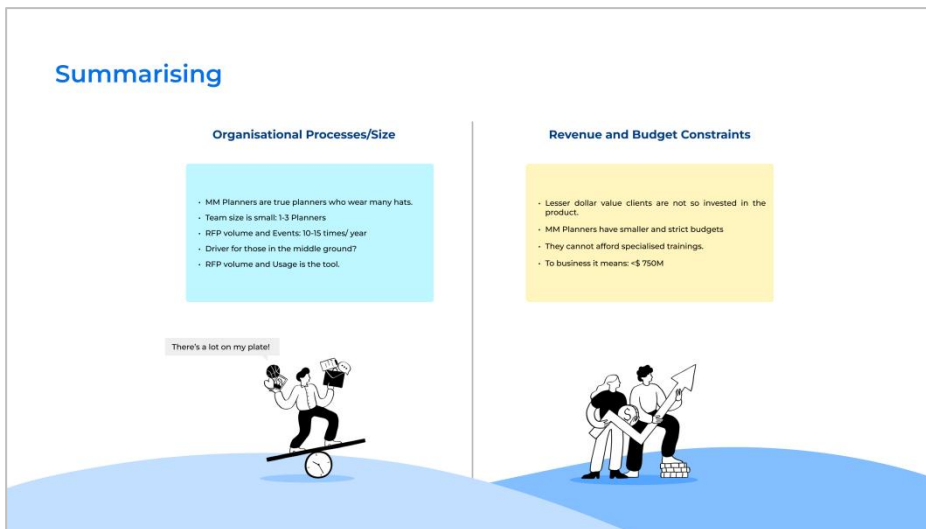


Figure 2.21: Summarised Themes-II

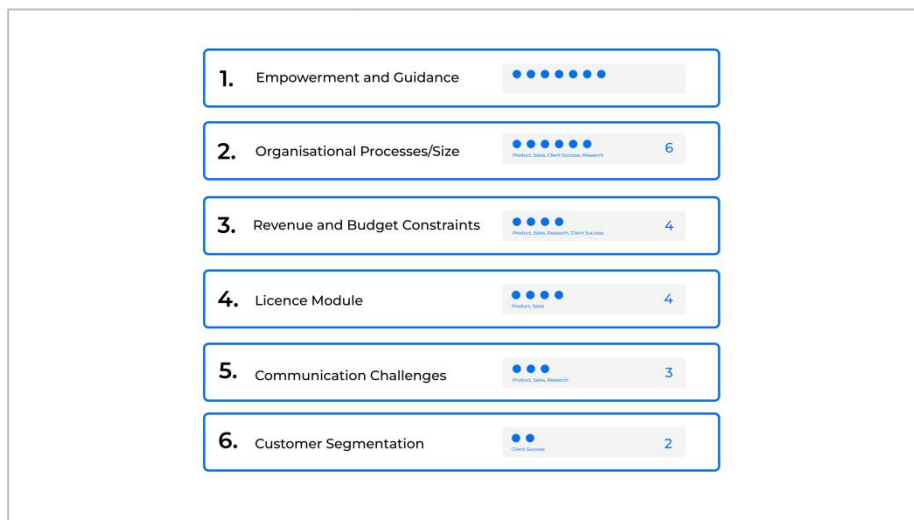


Figure 2.22: Prioritising Themes

2.1.13 Inferences

Summarised themes as per priority order and inferences:

i. Empowerment and Guidance

- No specialized training.
- No Active CS Reps: Lack a voice
- Lack Awareness about new releases and features/Best practices- Not very well-informed clients.
- Finds the system complex and difficult to use.
- Need Hand-holding/guidance.

Inferences

- **Guidance:** Guided Experience for users who are not well-versed with the system's functionalities.
- **Awareness:** Raise awareness about the features, new releases and enterprise functionalities that they can leverage and best practices, benefits of awarding, etc.
- **Empowerment:** Give them a voice and a space to express their concerns and feedback with minimum human intervention.

ii. Organizational Processes/Size

- MM Planners are true planners who wear many hats.
- Team size is small: 1-3 Planners
- RFP volume and Events: 10-15 times/ year
- Driver for those in the middle ground?
- RFP volume and Usage is the tool.

Inferences

- **Operational Efficiency:** Smaller team sizes call for more efficient ways of managing time and practices that improve productivity.
- **Error Prevention:** Smaller teams and less time requires a platform which reduces the risk of errors in the process and make the entire experience seamless.
- **Customisation:** Optimise the RFP forms and other workflows by customising the experience. Less lengthy processes and simplification.

- **Driver for User:** Easy-to-use platform for planners to enhance their productivity and streamline their workflow.

iii. Revenue and Budget Constraints

- Lesser dollar value clients are not so invested in the product.
- MM Planners have smaller and strict budgets.
- They cannot afford specialised training.
- To business it means: <\$ 750M

Inference

- **Access to community and training:** Find a better way to incorporate training and access to the community as they don't have time or budgets for specialised training.
- **Pay-as-you-go:** Allow users to upgrade their licence directly from the site online.
- **Future Enterprise:** Lesser dollar value clients are not aware of the product's full capabilities but have the potential to become future enterprise accounts.

iv. Licence Module

- Starter Bundle
- Price point: \$5000
- Three features: NSO Contacts, RFP Preferences, and Custom Questions.

Inference

- **Focus Areas:** Improvement in User Experience for NSO, RFP Preferences and Custom Questions.
- **Online Customisation:** Customisation Options for Starter Bundle: Scope to inform planners of the available features and enterprise functionalities.

v. Communication Challenges

- Planners experience difficulty when venues do not respond on time or drop out.
- Best practices to minimise turn downs.
- How do planners prioritise responses?

Inference

- **Best Practices:** Propose best practices for creating RFPs and ways in which you can get more responses (Dos/Don'ts/Data Insights: RFP performance).
- **Prioritisation:** Help the planners prioritise their responses from suppliers.
- **Re-editing RFP:** Help them out while re-editing the RFP and inform them of what went wrong.
- **Suppliers End:** Introduce a driver for the suppliers like Reputation building or incentivise with data insights into customer preferences and demands.

vi. Customer Segmentation

- TPP, Corporate, and G-A-N-E
- Corporate: Life sciences, Finance, Technology
- G-A-N-E: Government, Association, Nonprofit, and Education

Inference

- The G-A-N-E accounts should be considered while designing to address their specific vertical-related needs.

2.2 DEFINE

Based on the insights from the primary study, a mid-market planner proto persona and Customer Journey Map were created.

2.2.1 Persona



Figure 2.23: Mid-Market Planner Proto Persona

2.2.2 Customer Journey Map

The CSN planner's existing journey map was used as a foundation to create a mid-market-specific customer journey map.

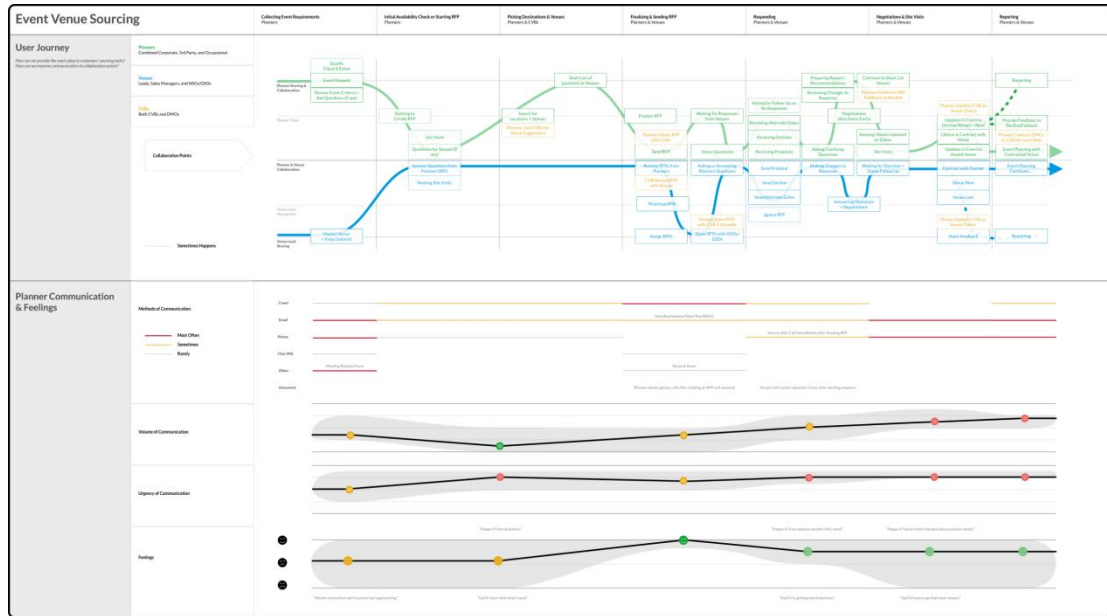


Figure 2.24: Existing CSN Planner Journey Map

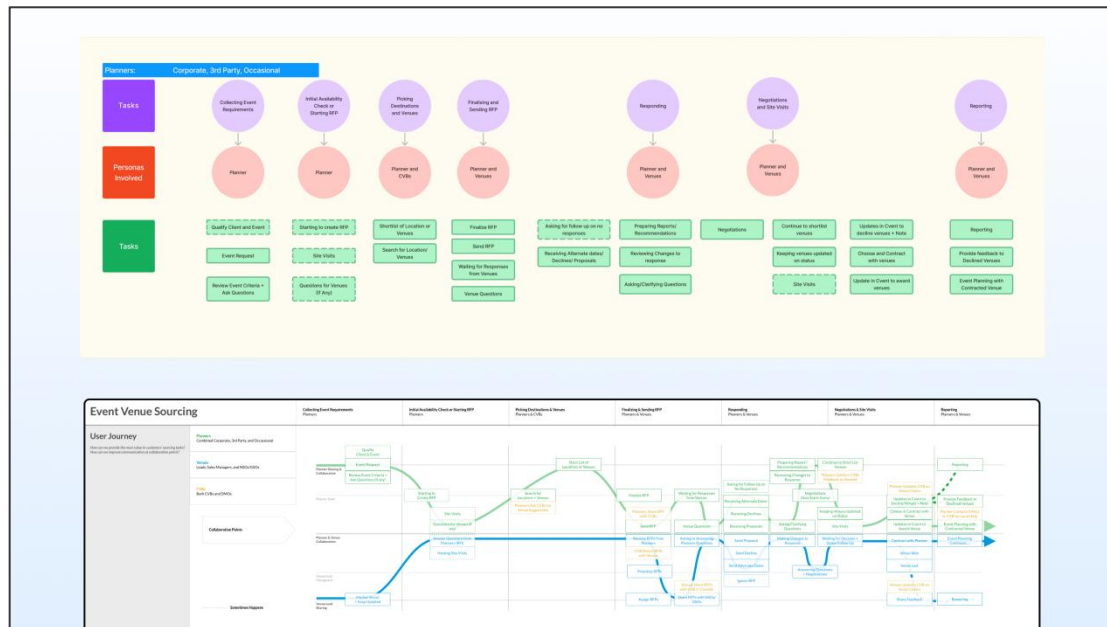


Figure 2.25: Understanding Journey Stages

The task, persona and journey stages were visually depicted for easier comprehension.

- Tools Leveraged
- Collaboration Points
- Opportunities

2.2.3 Re-defined Problem Statements

HMW Statement-I

How might we improve the awareness among mid-market planners about the system's features, new releases, updates, licence functionalities and HC capabilities which can be leveraged to their benefit?

HMW Statement-II

How might we guide the MM Planners through the CSN Phoenix platform for seamless navigation and a streamlined workflow?

HMW Statement-III

How might we customise the platform to the needs of Mid Market Planners to improve their productivity, and operational efficiency and prevent error?

2.3 IDEATION

Once the research analysis and insights surfaced, it was time to brainstorm ideas to make the CSN Phoenix experience simple, easy to use and intuitive for mid-market planners.

The initial steps involved using mind mapping as a visual tool for the generation of ideas to come up with a few high-level concepts or design directions for the potential solution (Refer to Figure 2.27).

Brainstorming Ideas



Figure 2.27: Mind Mapping

Some of the emerging ideas have been mentioned in Figure 2.28.

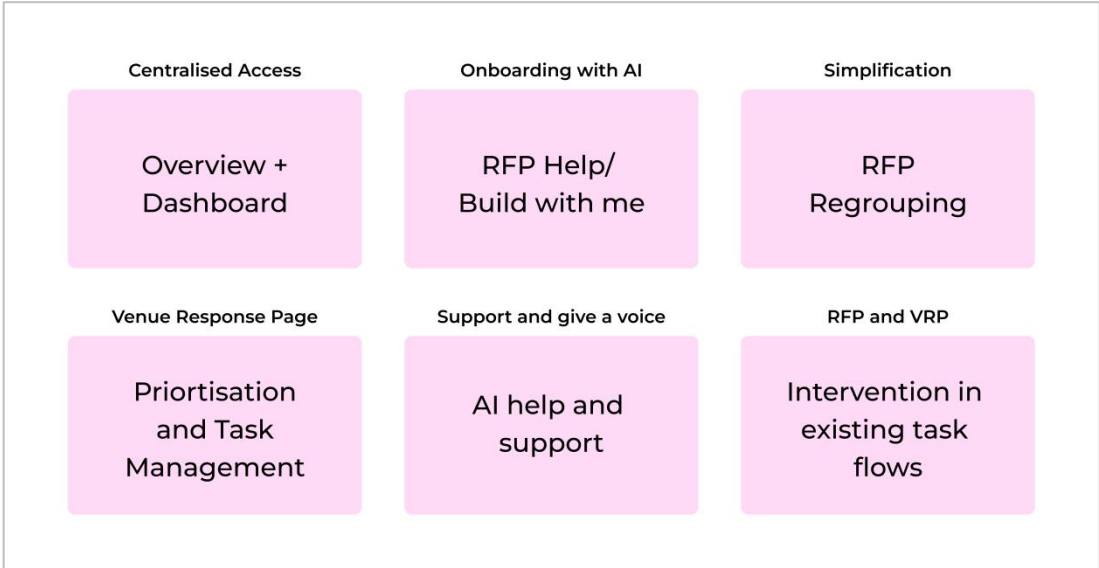


Figure 2.28: brainstormed Ideas

2.3.1 Ideation Workshop

The Ideation workshop involved cross-functional teams including participants from UX, Product and Developers teams to generate more diverse ideas. **There were a total of 15 participants.**

i. Agenda

This was an in-person workshop which was planned and divided into two phases:

Phase-I

- The first phase involved aligning everyone with the research findings and mid-market planners' pain points.
- Ice-breaking activities were also planned in the first phase to help the participants settle in, grab their attention, and add a fun element.
- Once the context was set, the stage was opened to address any doubts or questions.
- The next step was to divide into 3 teams, where each team consisted of a designer, a developer, and a product manager.
- The ground rules for the workshop were set and a crazy-8 workshop was conducted with the teams.

Phase-II

- In the second phase each team shared and presented their set of ideas.
- This was followed by a thorough discussion where everyone contributed their perspectives and thoughts.

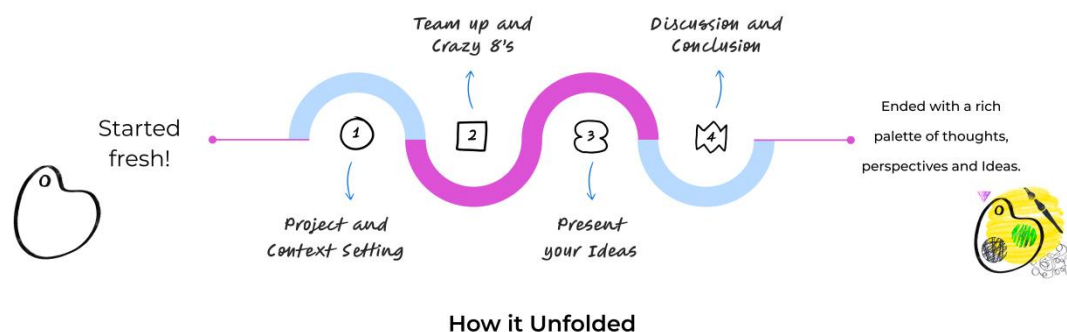


Figure 2.29: Ideation Workshop Agenda

ii. Workspace

The participants were provided with all the necessary supplies such as sheets, markers, pens, sticky notes for sketching and jotting down ideas. A **Fig-jam workspace** was also provided to let the participants access necessary resources, collaborate, and present their ideas.

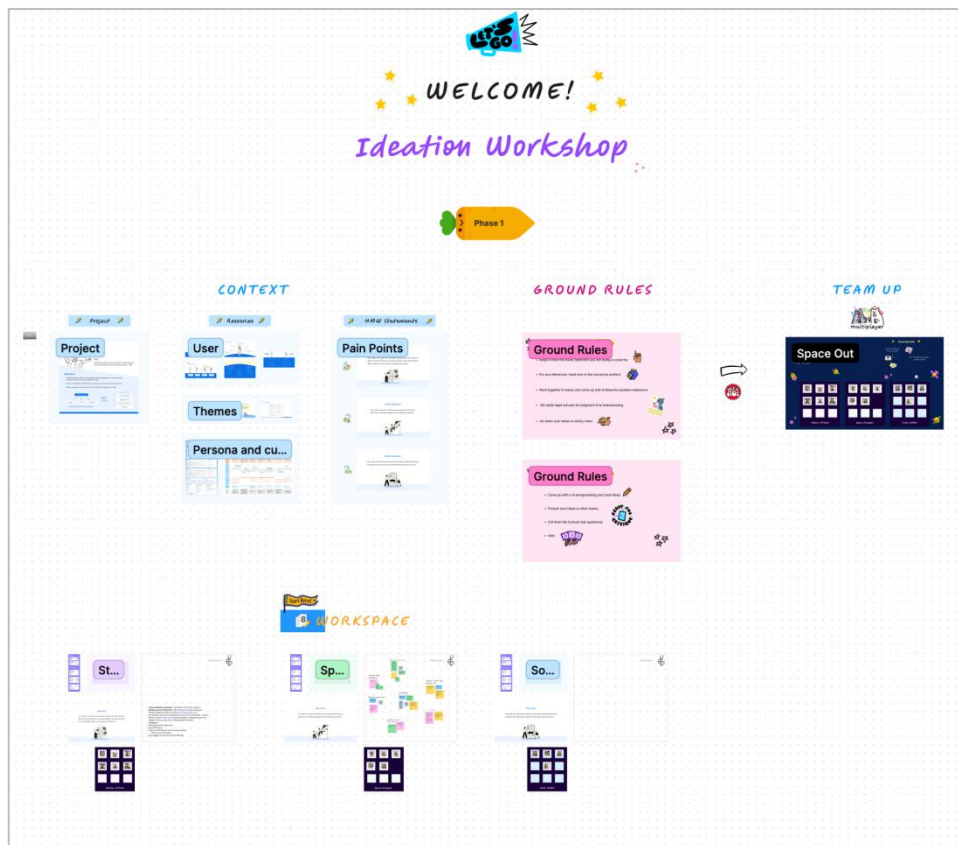


Figure 2.30: Figjam Workspace

iii. Participants and Teams

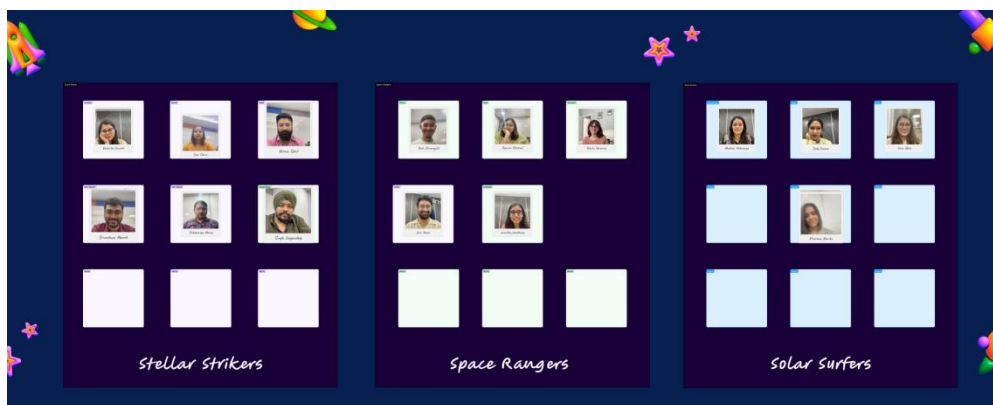


Figure 2.31: Teams

iv. Workshop In-Action

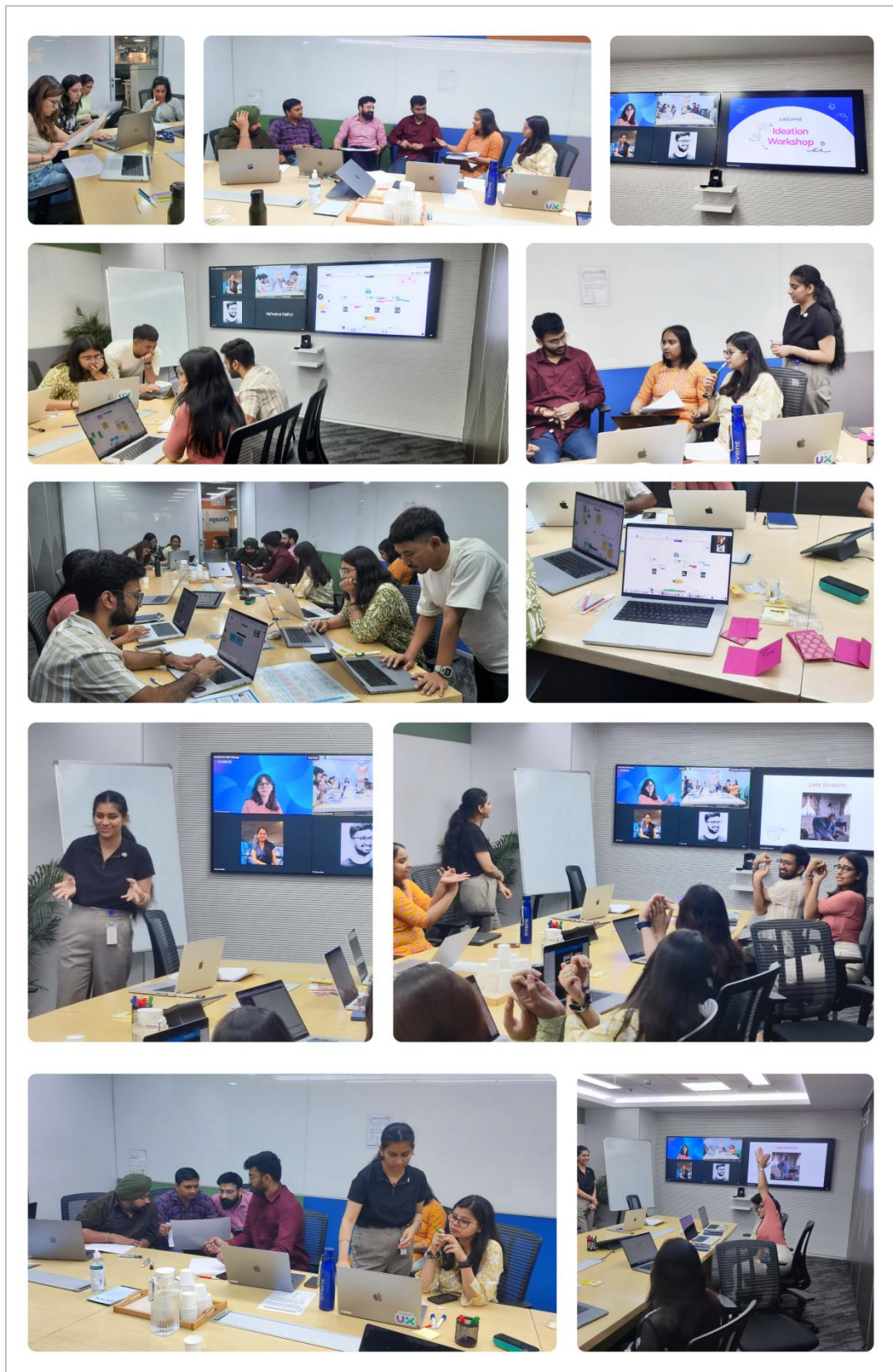


Figure 2.32: Stills from the Ideation Workshop

v. Moderator's Guide

A moderator's guide was prepared in advance to ensure that each activity was well-planned, time-boxed, and effectively executed during the actual workshop.

Task	Timeline
Dry-run with interns	17-04-24
Workshop Day	18-04-24
Share Actionable Items with participants	19-04-24

Table 2.3: Workshop Timeline

Team

- **Facilitator:** Supreet Kaur
- **Logistical Support:** Avantika (Product Design Intern)
- **Tech Support +Time Keeper:** Aman Jain (Product Design Intern)

Participants

- UX Team
- Product Team
- Developers

Workshop Time: 2 hours

Pre-workshop prep (20 min prior)

- Supplies- Sheets, Sticky Notes, Pens, Pencil, Markers
- White Board
- Screen Sharing setup + microphone
- Print Outs (If Any)
- Meeting Room Setup

[3:30 pm] : Settle Down and Welcome (5 mins)

Settle Down: 5 minutes

<Ask everyone to join the link> <Begin Recording> <Start Screen Sharing>

- Welcome to the Ideation Workshop Everyone!

- My name is Supreet Kaur and I am a product design intern who will be facilitating this workshop.
- So let's get started.
- Slide 1: Anchor Quote: I would like to start this workshop with a quote that resonates with what we will be expected to do today. <Quote> We all have gathered here today to brainstorm together on how can we make the CSN Phoenix experience seamless, intuitive and easy to use for mid-market planners. So participation from everyone will be very valuable. Thank you all for joining!
- We have some exciting activities lined up for the next two hours, divided into two phases.
- In the first phase I'll discuss the project and findings on mid-market planners and then we'll team up to perform a crazy 8s brainstorming activity.
- In the second phase we will present our ideas to each other.

Buffer (3 min): Any Questions?

[3:40] : Ice Breaker Activity (2 mins)

- So before we start, let's stretch!
- We are all back from our lunch breaks and sleepy so this is needed!
- Sitting for too long can be tiring anyway!
- Are we all ready now?

[3:45] : Context (15 mins)

Now I want you all to stay with me and while I will talk about the project,

Project (2 minutes)

- Speaking of the Aim of this project. It is to identify and recommend solutions to optimise the workflow for mid-market planners in CSN.
- The objectives of this project were to understand the needs and challenges of mid-market planners in event planning.
- To understand CSN's features and functionalities and how MM planners leverage them

- Gain insights into the gaps and friction points in the workflow of mid-market planners when using the CSN.
- Addressing these gaps, the outcome should be a simple, intuitive and seamless user experience driving more MM planner engagement and adoption of Phoenix.

Buffer (2 mins): Any Questions?

Mid-market Planners (8 minutes)

slide 1

- Now let us understand about mid-market planner persona.
- Looking at some planner personas, there are corporate or enterprise customers, they are usually big MNCs like Amex and Microsoft.
- Then we have Third Party Planners who plan/host on behalf of other organisations.
- Occasional/ Casual Planners are people like us, they are professionally not planners.
- Mid-market customers come from medium-sized organisations.
- But what are the key differentiators? Is it the revenue or the organisation's size? Let us understand together.

slide 2

- MM planners can be called direct planners, True planners, or Free planners all because they wear many hats, and they are planning directly, meaning there is no dedicated event source on their team. They share multiple responsibilities.
- For differentiators, there are a few perspectives,
- From a product perspective, Usage and Volume of RFP is the tool. MM planners drive small volumes of RFPs through the system, only 10-15 times a year, some higher dollar-value clients may go as far as 10 times a month. They spend only a few hours a day on the system.
- From a Sales Perspective, the size of the organisation is the tool. MM to business means they do under \$750M in revenue. Their team sizes are small (1-3 planners), hence smaller organisational processes.

- The licence module the majority opts for is the starter bundle, which has three paid features that is NSO contacts, RFP Preferences and Custom Questions.

Slide 4

- Now when we draw a comparison between Enterprise and MM Planner, Enterprise Planner is a power user who is driving large RFP volumes and they are in the system 8hrs/day.
- As a result these accounts are driving 70% of the revenue, consequently they have active client success representatives for support, access to more features, functionalities and point of contact across various products.
- But when it comes to mid-market planners, they are in the middle ground, driving fewer RFPs, and are within the system only a few hours a day or times a month.
- The number of accounts is also quite large but revenue is low. As a result, they don't have active CS reps.
- Therefore they are not aware of all the tools and functionalities that can be leveraged for their benefit.

Buffer (2 mins): Any Questions?

Findings and Pain Points (5 minutes)

- For ease of understanding, let's summarise these points under the following categories/themes.
- We discussed how MM planners have multiple responsibilities and smaller team sizes, which calls for operational and time efficiency.
- They face communication challenges with the suppliers/venues. At times, they face many turndowns or don't receive timely responses. Questions arise on what went wrong or whether are there any best practices for planners to avoid such a large number of turndowns.
- This points to the next theme which is, empowerment and guidance. Why do they need it? They're not very well-informed clients. We discussed how they don't have active CS reps talking to them. As a result, there is a lack of awareness about new features and releases or best practices. So how to better inform them?

- Another challenge they face is, finding the system very complex and difficult to use. Since they're in the system less often and not very well versed with it.
- We have discussed the licence module they opted for; the starter bundle.
- Lastly, we have budget and revenue constraints. As lesser dollar value clients, they're not so invested in the product. This also points to the fact that, in addition to smaller organisational processes, they lack the time and budget to go through any specialised training.

Buffer (2 mins): Any Questions?

[4:10]: Problem statements (7 mins)

- Based on the number of stakeholders aligned, the themes have been prioritised.
- All of these insights have also been compiled into a persona that you can read for reference. Bio, their goals, challenges and aspirations.
- And a customer journey map covered pretty much all the points here.
- I'll surface some examples related to let's say finding the system complex there's an insight regarding how RFP forms are too long and complex for them
- Awareness-when the planner enters after a long time, there are many updates PHX to which they are unfamiliar
- Adding to this, while sending RFPs, they need help with leveraging NSOs as well as best practices to avoid delays or turn downs in responses.
- I'll give you time to go through this.
- Our focus will be on these 3 problem statements
- So far so good?

Buffer (2 mins): Any Questions?

<Share the figma file>

The Figma link has been shared on the chat. If you take a look at my screen, you can click on this icon and follow me on the file. I have given all the resources, regarding the project, and context in this section. you can always go back and refer to this.

[4:20]: Teaming Up (5 mins)

Now it is time to team up. Before we get into problem-solving, follow me to the space-out section. I want you all to click a funny picture and place it in the boxes below. Let me give you a demo. So these are the teams we have.

<Play music and timer>

[4:25]: Ground Rules (5 mins)

- Follow me to the workspace area.
- You all will be working in teams
- Remember the 3 problem statements? I want each team to work on one problem statement.
- So brainstorm together and list down those ideas or sketch them out either on Figma or you can use sticky notes.
- There's a whiteboard too if you want to do whiteboarding and brainstorm there.
- There will be a timer running. You'll have 20 minutes to list out all your crazy ideas.
- Meanwhile, if you have any questions, just ask away.

<Timer Begins>

[4:35]: Crazy 8's (25 min)

- Check with the team the spot questions
- Moderator: Record the discussions of both teams.

[5:00]: Discussion (20 min)

- It's time that we present our ideas to everyone.
- Everyone else can ask follow-up questions.

[5:20]: Conclusion (5 min)

- Thank you note

2.3.2 Workshop Insights

Every team proposed insightful concepts about how the experience of mid-market planners can be improved and optimized according to their needs.

The insights and ideas generated from the workshop were revisited. Some of the emerging ideas and concepts have been depicted in the Figure 2.33.



Figure 2.33: Design Directions

2.3.3 Affinity Mapping

To analyze the insights gathered from the workshop, all the concepts and ideas were categorized based on their similarities. The following categories were identified (Figure:

i. Updates

- There were a few concepts around including an update feature on the platform to inform about the new features, emphasizing the benefits and efficiencies it can offer to mid-market planners. This can be done through a short video or a concise description. This can act as a “what’s new” functionality.
- **Quick Guides:** One idea was to prompt users with quick guides at time-bound intervals to improve efficiency and reduce errors. This update could be added to the venue list.
- **Notifications:** An in-app notification mechanism for new features can be one way of introducing and alerting the user about the availability of new features.
- **Pop ups:** Whenever there is an update, show a pop-up like: “What all changed since your last visit.”
- **Emails:** Communication about new feature updates or releases through emails.

ii. Freemium

- Introducing the concept of ‘*Freemium*’ to let the new users experience premium features for a certain period. This can help in ‘generating need’ for the premium features and also raise awareness among the users about the features that are available for them to leverage.
- Option to self-checkout and customize the bundles by providing access to the premium plan information. This is also in line with the Cvent’s initiative, ‘PLG-product-led growth’. The overall goal of the PLG initiative is to upgrade free users to “paying” clients to provide a better experience, drive more RFP volume, and drive additional revenue directly through the product without human intervention.

iii. Task Prioritisation

- Introducing smart ways like AI to make decisions around the received bids and auto-suggest venues based on RFP data.
- Another way to prioritize tasks can be through an ‘auto suggest’ venue based on RFP data.
- Sharing the customer reviews and feedback about their ‘awarding RFP’ experience while MM planners are in the awarding stage.

iv. Leveraging AI

- **In-App tour:** An effective way to sensitize new users about the platform’s features or in a scenario when the user enters the platform after an update. These walkthroughs can be short, and feature-specific with interactive tricks and tips.
- Leveraging AI to guide user throughout the process, such as through a chatbot or by automating the manual tasks to save time.

v. Simplifying Navigation

- Introduce a quick RFP feature.
- Break down features into steps (like wizards) to simply use and improve understanding and planner adoption.
- Fetching section-wise information from the previously created RFP forms to minimize repetitive tasks.
- Adding a progress bar for visibility of system status.

vi. Existing Workflow

- Revisiting the existing workflow of the redesigned experience, pick the ideal user journey and identify places where it is feasible to nudge the users to the next possible steps. Such as guiding with tooltips, and flyouts.

vii. Dashboards

- Create a dashboard that features all the summaries of venues, a bird’s eye view of the RFP, progress details, flowcharts or bars.

- It can also feature recommended actions and information about the updates that the user might have missed.

viii. Knowledge base and guides

- Enhancing the Cvent Knowledge base and updating the supporting material since the focus is also shifting towards mid-market planners.
- Contextual Guides that include a step-wise breakdown of the process and to-do lists.
- Video content/guides: Short and crisp tutorial options.

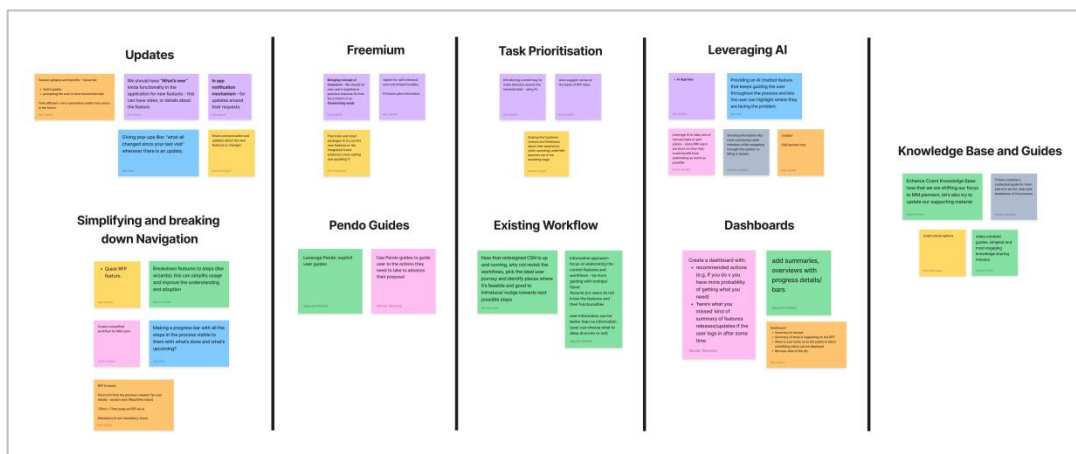


Figure 2.34: Affinity Mapping of Ideas

2.4 CONCLUSION AND NEXT STEPS FORWARD

The desk research and primary study findings highlighted the crucial aspects surrounding the mid-market planner persona and their experience on CSN phoenix. These findings paved a way to formulate the problem statements which were around the need of awareness generation, guidance and making the CSN-PHX platform experience simplified and easy-to-use. The ideation workshop was pivotal in terms of exploring fresh ideas and looking at the given pain points from diverse point of views or lenses. These design directions or concepts will serve as the foundation for developing potential design solutions.

The next steps forward include the following tasks:

- Analysis of Ideas and concepts from the workshop.
- Prioritisation of concepts based on Desirability, Feasibility, Viability (DFV Mapping)
- Paper and low-fi Prototyping
- Hi-fi Prototypes and Testing

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