

2026 Buyer's Guide Meetings & Events Tech for the AI Era

How to modernize meetings management with scalable, AI automation that reduces risk, cuts manual work, and delivers enterprise visibility

Bonus *

RFP Template With AI



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Introduction

Meetings are the heartbeat of every organization — and AI is quickly becoming the brain that keeps them running efficiently, securely, and at scale.

After years of disruption, in-person collaboration has not only returned but surged ahead. Planners expect continued growth across all meeting types, with small and simple gatherings driving the majority of volume. At the same time, global business travel spending has surpassed pre-pandemic levels, signaling a full-scale rebound in enterprise mobility and collaboration.

This resurgence represents both an opportunity and a new operational challenge. Organizations are under pressure to manage thousands of meetings consistently, across departments and regions, while containing costs, enforcing compliance, and improving both the planner and attendee experience. The systems once designed for basic event logistics are no longer enough.

That's where AI-first meetings management comes in.

Intelligent automation now drives every part of the meetings lifecycle — from intake and sourcing to reconciliation and reporting. By embedding AI agents directly into workflows, leading organizations are eliminating repetitive manual tasks, ensuring compliance, and capturing complete data visibility across all meeting types.

This guide was created to help you navigate that shift and make confident, future-ready decisions. It provides a step-by-step framework to evaluate solutions that are built not just for efficiency today, but for adaptability tomorrow.

Inside the Guide

1. Clear Goal-Setting for Your Program

Before evaluating vendors, define success. Learn how to identify pain points, measure capture rates, and align technology investments with tangible outcomes like savings, compliance, sustainability, and engagement.

2. An Overview of Solution Types and How They Differ

The marketplace is crowded — from point tools to full enterprise ecosystems. Understand how traditional event, travel, and venue management platforms compare, and why AI-powered consolidation delivers better data, savings, and control.

3. Stakeholder Benefits and Practical Use Cases

Meetings management touches every department: compliance, finance, HR, procurement, sales, and travel. Explore how each group benefits from automation and real-world examples of enterprise rollouts and small-meeting programs.

4. Vendor Evaluation Criteria and Sample Questions

Move beyond feature checklists to assess real AI maturity, automation depth, and explainability. Use the detailed question sets to evaluate adoption readiness, integration strength, and measurable business outcomes.

5. A Roadmap to Building Your Business Case

Secure executive buy-in with a business case that blends financial ROI with strategic impact. Quantify how AI reduces manual hours, increases compliance accuracy, and streamlines approvals and reconciliation cycles.

6. A Standalone RFP Framework You Can Lift Directly

Save time with a ready-to-use RFP template that ensures apples-to-apples vendor comparisons. It includes functional requirements, compliance checklists, integration criteria, and evaluation matrices you can adapt instantly.

7. Final Takeaways to Ensure Lasting Value

Learn how to select a partner that delivers continuous innovation, transparency, and AI-driven outcomes — not promises. Discover the traits that define a modern platform: scalability, explainability, and human-centered design.

Why an AI-First Approach Is No Longer Optional

AI has fundamentally changed the definition of “modern” technology.

Today’s leading platforms don’t just digitize forms, they think, predict, and act. They automate intake and approvals, detect risky contract clauses, reconcile budgets in real time, and validate healthcare professionals for compliance reporting.

Organizations adopting AI-first meetings management are achieving:

- Up to **70% faster approval** and sourcing cycles
- **3–5 hours saved per meeting** through automation
- **Compliance scores exceeding 90%** in regulated industries
- **Unified visibility** into total meetings spend, risk, and performance

This shift marks a turning point. AI is no longer a feature to check off — it’s the foundation of scalable, compliant, and data-driven collaboration.

The following sections will guide you through how to build your program, evaluate your options, and choose the right AI-driven partner to future-proof your meetings strategy.

[Let’s get started.](#)



CHAPTER 01: Goals

Define Your Meetings Management Program

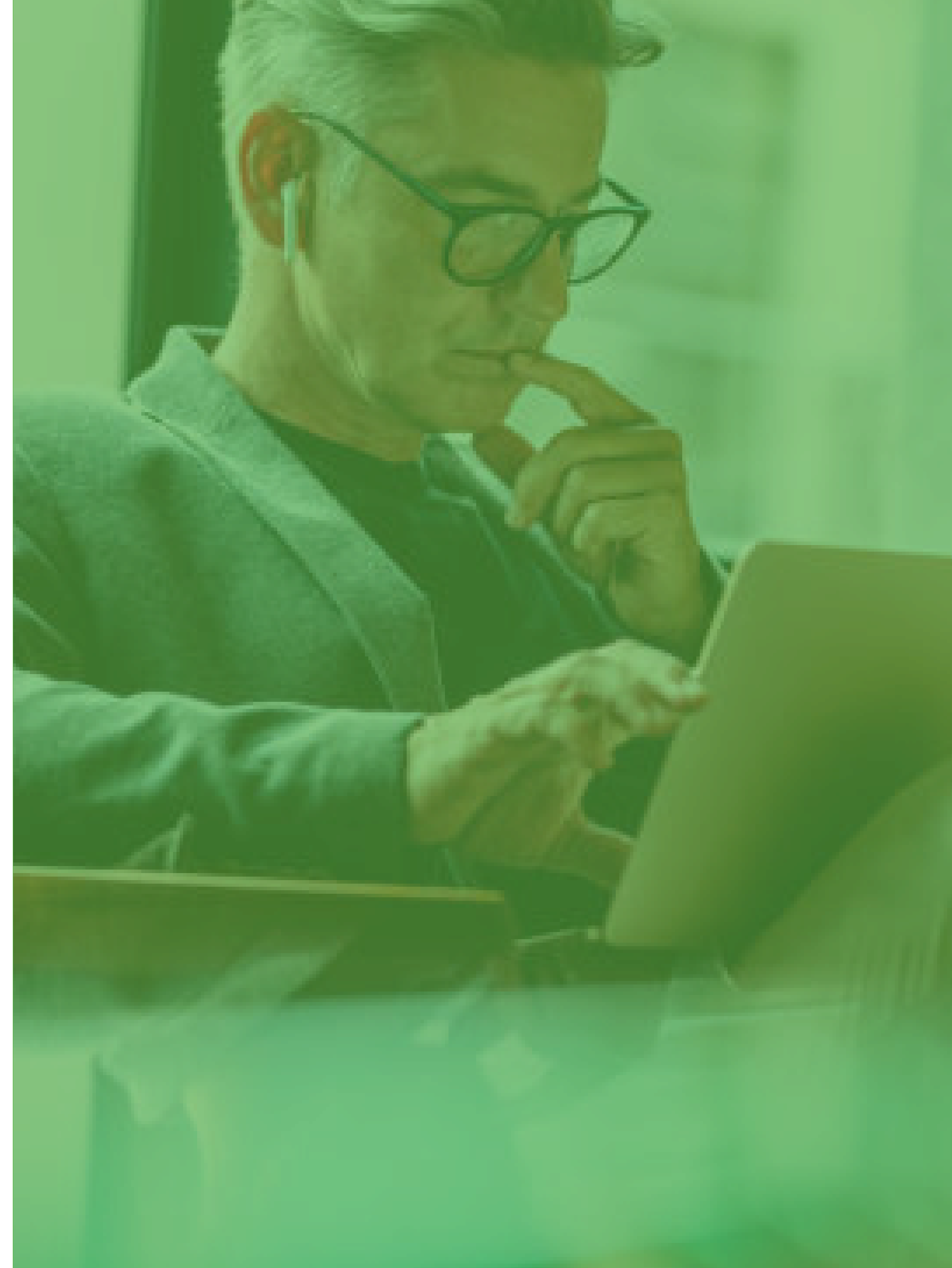
Before you compare vendors or demo new software, take a step back. Technology can only deliver value if you know exactly what problems you're trying to solve and how you'll measure success.

Too often, organizations purchase tools reactively — chasing features without defining outcomes. The result is underutilization, poor adoption, and wasted budgets. An AI-first approach flips that logic: it starts with strategic intent, then aligns technology to amplify impact.

Ask yourself:

- Do you know how many meetings your organization hosts annually, and what they cost?
- Are you tracking all types — internal, external, regulated, customer-facing, hybrid?
- Where do your biggest pain points occur — budget visibility, compliance risk, reconciliation, or attendee experience?
- How do you measure “success” today, and how could automation improve it?
- What does an ideal state look like 6–12 months from now — higher capture rates, faster approval cycles, compliance scores above 90%?
- How will you track purpose-driven outcomes like sustainability, accessibility, and inclusion?

AI can play a role in every one of these metrics. From automated reconciliation that detects errors instantly to AI-driven intake forms that capture the right data from the start, intelligent systems transform scattered processes into measurable progress.



CHAPTER 02: Solution Types

Understand the Tech Landscape

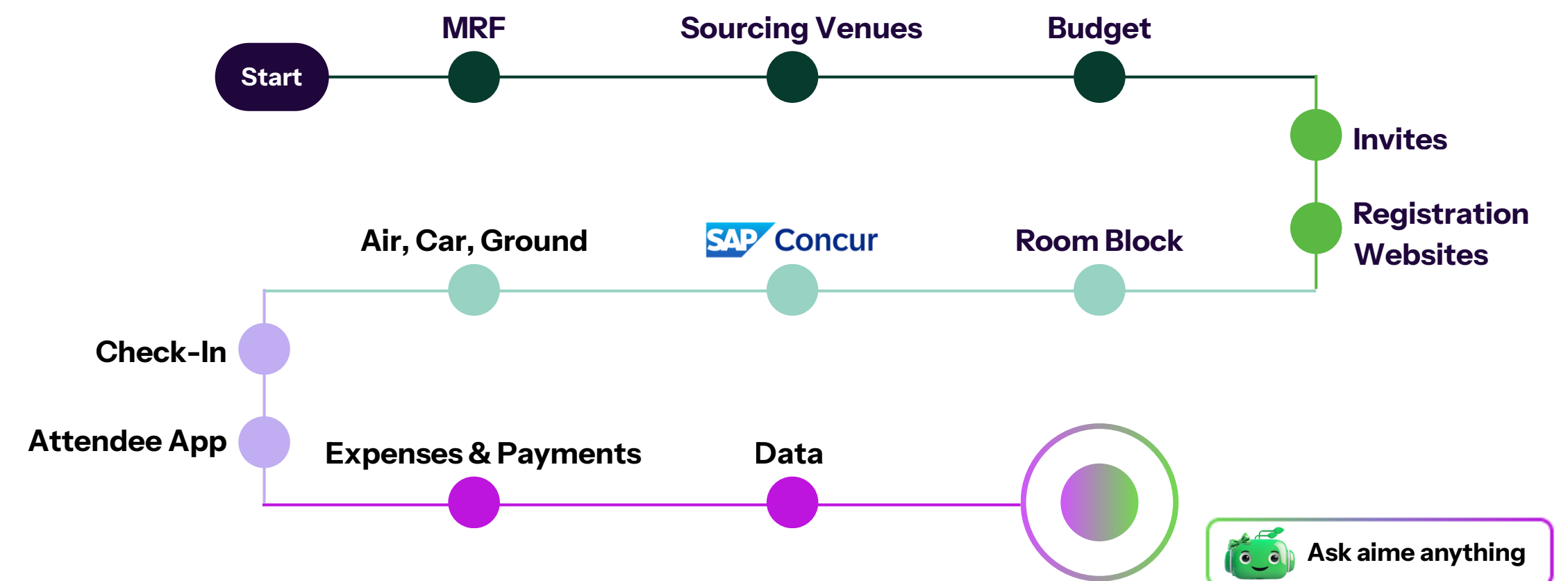
The marketplace is crowded, with products addressing different slices of the meeting lifecycle. Understanding these categories helps buyers see overlaps and why consolidation is often the smarter path.

Solution categories:

- **Event management software** – Registration, ticketing, agenda management, attendee engagement.
- **Travel management software** – Booking (air, hotel, ground) and expense management.
- **Venue management software** – Venue selection, room booking, floor plans, catering.
- **Event marketing tools** – Email, landing pages, social promotion, analytics.
- **Event mobile apps** – Agenda access, real-time updates, 1:1 networking.
- **End to end enterprise management platform** – Unified systems that manage all meeting types and sizes through intelligent automation. They streamline intake, sourcing, travel, compliance, and reconciliation using conversational AI to deliver visibility, control, and measurable ROI.

While point tools can be excellent at a single function, relying on many disconnected systems increases risk, data gaps, and cost. A unified, end to end solution enables enterprise management across all sizes and types, while incorporating Strategic Meetings Management (SMM) controls (policy, spend, risk). Think of it as the umbrella that captures everything, and SMM as the discipline that optimizes it.

When evaluating platforms, look beyond feature lists to how AI is embedded in the workflow. Ask vendors whether their automation is active today, how it learns, and whether it provides explainability and administrative guardrails. A system that simply “uses AI” isn’t enough — it must deliver tangible, measurable outcomes your teams can trust.



CHAPTER 03: Stakeholders

Who Benefits & How

Meetings management touches nearly every department. Each has distinct needs and outcomes to measure.

Stakeholder benefits:

- **Travel managers** – Visibility into all bookings; negotiated rate compliance; duty of care.
- **Event managers** – Automation that reduces manual tasks; better attendee experience.
- **Compliance officers** – Audit-ready reporting; life sciences HCP validation; fewer exceptions.
- **HR & training leaders** – Scalable onboarding and learning pathways across regions.
- **Finance executives** – Accurate, consolidated spend data; better forecasting and accruals.
- **Employees & attendees** – Smooth registration, communications, and onsite logistics.

Use cases:

- **Enterprise rollout (mixed portfolio).** Travel sees air/hotel spend for all meetings; compliance gets real-time HCP transparency; HR orchestrates onboarding cohorts; finance forecasts confidently from a single data source.
- **Small meetings program.** A marketing manager submits a guided intake for a 25-person workshop; the platform routes approval, shortlists venues, enforces catering policy, launches registration same-day, and logs everything to dashboards.



Sales



Transparency & Compliance



Travel & Meetings



Finance

CHAPTER 04:

Vendor Evaluation

Choosing a platform is more than a feature checklist; it's about partnership, adoption, and measurable outcomes. Below is a consolidated view of core capabilities, the extended AI expectations, and the granular question set you flagged.

Core capabilities to require:

- **Intake & governance:** Central request portal, conditional approvals, company calendar, centralized budgets.
- **Venue & supplier sourcing:** Global marketplace; standardized RFPs; side-by-side comparisons; clause variance detection; rate/contracts; internal space booking; concierge/live availability.
- **Registration & attendee experience:** Branded sites in <24 hours; templates/cloning; multilingual; attendee types; consent; mobile apps; email/SMS; QR check-in; e-signatures; session scanning; optional badge printing.
- **Guest & group travel:** Air/hotel/ground; manifests; booking-window nudges; room block management; folio reconciliation; two-way integration (e.g., Concur).
- **Compliance (for life sciences organization):** Digital HCP sign-in (QR, OCR, mobile); license validation; meal opt-outs; automated expense sync; compliance dashboards; audit trails.
- **Payments & reconciliation:** Virtual/lodge cards; POs; invoice OCR; anomaly detection; GL mapping; ERP/expense integration; budget vs. actuals dashboards.
- **AI: Conversational intake;** marketplace intelligence; autonomous RFPs; budget & reconciliation agents; compliance automation; location optimization; explainability, logs, sandbox, admin guardrails.
- **Data & reporting:** Standardized data model; real-time dashboards (spend/savings/risk/DEI/sustainability); APIs and data dictionary; BI exports.
- **Security & privacy:** SSO/SAML; SCIM; RBAC; audit logs; ISO 27001/SOC 2/PCI; GDPR retention/deletion; data residency.
- **Sustainability, accessibility, DEI:** Venue sustainability filters; paperless events; carbon offsets; accessibility collection & disclosure; DEI participation reporting.

The Emerging Role of AI

Key AI capabilities (retain):

- **Conversational intake that turns natural**-language dialog into a complete meeting brief/MRF
- **Marketplace intelligence:** enriched venue sourcing with trending insights, ratings, photos, and comparisons.
- **Autonomous RFP management:** drafts, distributes, tracks; flags outlier fees and risky clauses.
- **Budgeting & reconciliation assistants:** policy-based budgets; detect duplicates and miscodes; real-time reconciliation.
- **Compliance automation:** OCR/QR/mobile sign-in; license validation; automated expense mappings.
- **Location optimization:** recommends cities minimizing travel cost/time, respecting policies and preferences.
- **Explainability & guardrails:** decision logs; admin sandbox for testing; retention/masking policies.

Detailed vendor questions

- **Language:** Is your tool global and multilingual?
- **Pricing model:** per user, per attendee, flat enterprise, hybrid? What's included in base? Any hidden fees?
- **Contract terms:** termination, early exit, auto-renewal, add-on pricing, implementation/support costs.
- **Integration depth:** travel (incl. two-way changes), expense/ERP, HRIS/SSO, CRM/marketing, BI; provide data dictionary and sample payloads.
- **Security posture:** ISO 27001, SOC 2, PCI; pen-test cadence; DPA and sub-processors; data residency options; GDPR tooling.
- **Adoption:** proof that casual organizers can succeed without heavy training; internal comms/change resources.
- **Roadmap:** cadence; customer input mechanisms; deprecation policy.
- **Measurable outcomes:** examples of savings, cycle time reductions, capture rates, compliance scores.
- **Support model:** dedicated CSM; response SLAs; channels; self-serve knowledge base; train-the-trainer programs.
- **Trials/pilots/sandboxes:** what's available and how quickly can we start?

CHAPTER 05: Business Case

Make the Decision Easy to Approve

Even the best platform will fail without stakeholder buy-in. Build a case that's both financial and strategic — one that connects automation to measurable ROI and risk reduction.

Step-by-step:

- **Problem statement:**

- Manual effort, fragmented tools, blind spots in spend and compliance risk, inconsistent attendee experiences.

- **Cost of doing nothing:**

- Hours lost to reconciliation and emails, missed savings from unmanaged small meetings, and exposure to non-compliant contracts or HCP reporting errors.

- **Vendor comparison:**

- Map requirements to capabilities, highlighting Total Meetings
- Management (TMM) coverage for all meetings and Strategic Meetings
- Management (SMM) controls for policy, spend, and compliance.

- **Tailor by stakeholder:**

- Finance (numbers and savings)
- Compliance (audit trails and HCP validation)
- HR (scalable training programs)
- Executives (enterprise optics and governance)
- Commercial teams (field efficiency)

- **Implementation snapshot:**

- 90-day intake and calendar setup;
- six months to majority capture; structured training and communication plan to accelerate adoption and compliance alignment.

ROI

- **Savings:** Through sourcing standardization, negotiated clauses, and tool consolidation.
- **Productivity:** Hours gained for planners, HR trainers, field reps, and compliance reviewers.
- **Risk reduction:** Higher compliance scores, fewer audit exceptions, and cleaner contract and sign-off processes.
- **Regulated industry assurance:** For Life Sciences organizations, include automated digital HCP sign-in, license validation, and Sunshine Act/Open Payments reporting to eliminate manual reconciliation and ensure audit readiness.
- **Purpose outcomes:** Sustainability tracking, accessibility fulfillment, and visibility.

What success looks like one year in:

- $\geq 70\%$ of meetings captured via intake (including small).
- Faster sourcing cycles and approvals; fewer redlines
- Unified total event cost (venue + travel + services).
- Compliance scores $>90\%$; near-zero expense rejections in HCP scenarios.
- Fewer tools and fees; higher organizer/attendee satisfaction.





Chapter 6: Compliance Checklist

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CHAPTER 06:

Compliance Checklist

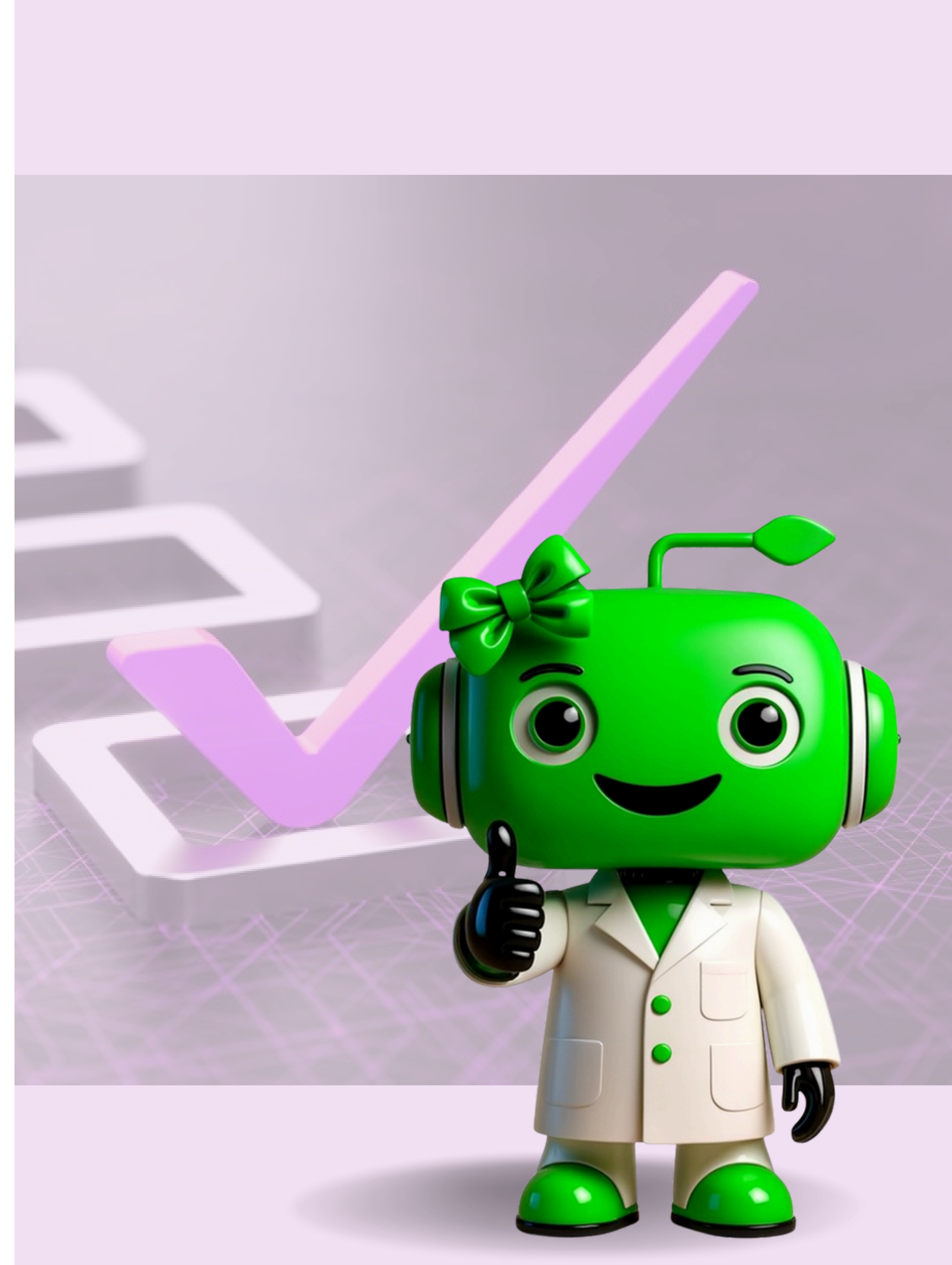
A modern meetings management solution should support compliance across multiple dimensions. Use this checklist to evaluate whether a platform provides the necessary safeguards and reporting for your organization.

Financial & Expense Compliance

- Automated reconciliation of meeting expenses with finance systems (ERP/Expense)
- Audit-ready reporting of meeting budgets vs. actuals
- Controls to enforce spending limits and policy thresholds
- Anti-bribery and anti-corruption compliance (FCPA, UK Bribery Act, Sapin II, etc.)
- Centralized tracking of payments (P-cards, ghost cards, virtual cards, POs)
- Detection of duplicate or fraudulent charges

Data Privacy & Security

- GDPR, CCPA/CPRA, LGPD, PIPEDA compliance for attendee data
- Consent management (opt-in tracking, meal opt-outs, photography waivers, etc.)
- PCI DSS compliance for credit card transactions
- SOC 2 / ISO 27001 certifications
- Role-based access controls and SSO/SAML authentication
- Configurable data retention and deletion policies
- Ability to select or enforce data residency (e.g., EU-only storage)



Travel & Duty of Care

- Live traveler manifests with real-time location data
- Automated alerts for disruptions, emergencies, or health risks
- Policy-based reminders (e.g., booking window compliance, approved suppliers)
- Integration with preferred travel agencies and TMCs
- Compliance with immigration/visa requirements for attendees
- Sanctions & denied party list screening (OFAC, EU, UN, etc.)

Contracting & Procurement

- Centralized clause library with variance detection (force majeure, liability, etc.)
- Automated routing for legal and procurement approvals
- Enforcement of preferred supplier agreements and negotiated rates
- Audit trails of contract approvals and changes
- Visibility into off-contract or maverick spend

Accessibility & DEI

- ADA/WCAG compliance for registration websites and event apps
- Ability to capture accessibility needs during registration (dietary, mobility, vision/hearing, etc.)
- Venue filtering for accessibility compliance
- DEI participation tracking across attendees, speakers, and suppliers
- Reporting to meet internal DEIAB and ESG benchmarks

Sustainability & ESG

- Venue sustainability indicators (recycling, renewable energy, emissions policies)
- Digital agendas, notes, and materials (to reduce paper waste)
- Ability to select sustainable catering options (local, organic, low-waste)
- Carbon footprint calculation per event (air, hotel, ground)
- Built-in offset programs or integrations with carbon offset providers
- Reporting aligned with ESG/CSRD/GRI frameworks



Chapter 7: Choosing the Right Platform & Partner

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CHAPTER 07:

Choosing the Right Partner

The SMM meetings landscape is complex, but the path forward is clear. Organizations need platforms that manage all meetings, of all sizes, while embedding compliance, security, sustainability, and inclusivity. AI should act as an assistant, delivering measurable gains today with transparency and guardrails

Your partner criteria (combine the “Why X” ideas generically):

- Scales from 5 to 5,000 attendees; supports unlimited users/events to drive adoption.
- Unifies intake, sourcing, registration, travel, onsite, compliance, payments, and reporting.
- Delivers AI that works now—not slideware—backed by explainability, logs, and admin control.
- Supports purpose: sustainability, accessibility, DEI built into workflows and reporting.
- Proves security & privacy: ISO/SOC/PCI certifications, GDPR tooling, data residency.
- Is priced transparently—no surprise per-attendee fees that suppress usage.
- Invests in you: onboarding, training, and a customer-first culture.
- Grows with you: a roadmap shaped by real customer needs and measurable outcomes.

When evaluated thoughtfully, the right solution and partnership delivers savings, reduces risk, and improves experiences—helping organizations focus less on logistics and more on outcomes.

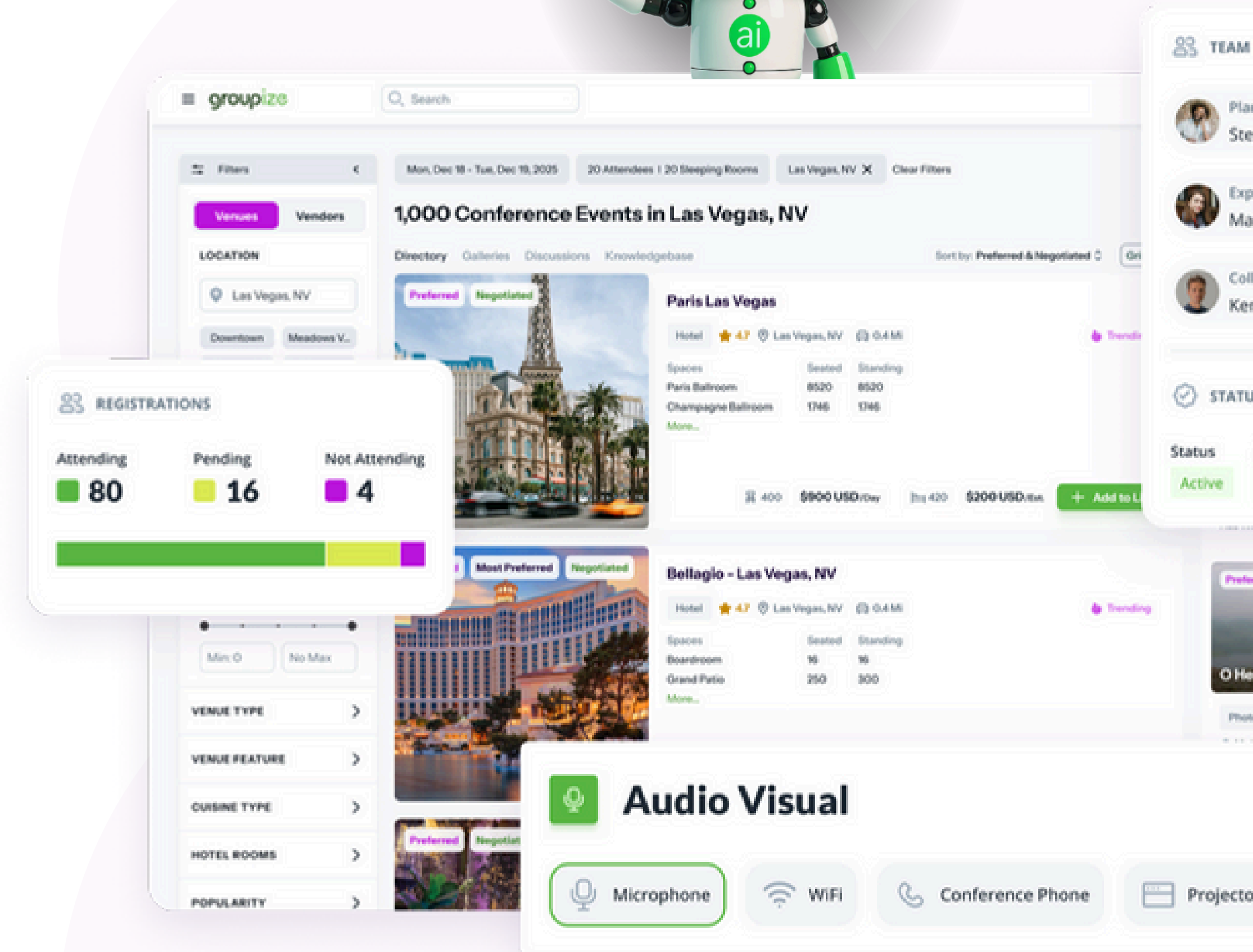


Why Choose Groupize.ai

While many solutions promise pieces of this puzzle, Groupize.ai uniquely delivers it all in one modern, AI-first platform. Built by industry veterans, it was designed from the ground up to address the realities of enterprise meetings today: fragmented processes, unmanaged small meetings, compliance risk, and the pressure to do more with fewer resources.

Here's what sets Groupize.ai apart:

- **All-in-one scalability:** Seamlessly supports meetings from 5 to 5,000 attendees with unlimited users and events.
- **AI that works today:** From conversational intake to digital HCP sign-in, Groupize.ai's proprietary agents automate real tasks right now—not future promises.
- **Unmatched compliance tools:** The industry's first AI-powered HCP sign-in and MedPro validation ensure audit readiness and Sunshine Act/Open Payments compliance.
- **Tightest SAP Concur integrations:** Groupize.ai is the only platform with two-way Concur Travel integration, plus Concur Expense and Request, eliminating manual entry and errors.
- **Frictionless adoption:** Intuitive design empowers both casual organizers and professional planners, minimizing training needs and boosting enterprise-wide capture rates.
- **Customer-first culture:** Groupize.ai invests in every client relationship, offering responsive support, rapid onboarding, and product innovation every three weeks based directly on customer feedback.
- **Value and transparency:** No hidden per-attendee fees; predictable pricing models that encourage full adoption across the enterprise.
- **Future-ready innovation:** With its Agentic AI Suite and rapid development roadmap, Groupize.ai is setting the pace—not reacting to it.




The Bottom Line

Meetings are no longer a back-office function—they are a strategic driver of culture, collaboration, compliance, and cost control. The organizations that win will be those that treat meetings as a managed enterprise category, supported by AI-powered technology that scales, automates, and continuously adapts.

Groupize.ai is that partner.

By unifying all meeting types under one intelligent platform, Groupize.ai reduces costs, ensures compliance, delivers better attendee experiences, and future-proofs your meetings program. For procurement, finance, compliance, HR, and travel leaders alike, the decision is clear: choose the platform built for today, ready for tomorrow.





BONUS RFP Checklist

Includes the AI capabilities you need to look for to future-proof your business

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BONUS: RFP Template

A well-structured RFP ensures apples-to-apples responses and faster internal consensus. Below is the complete template you can copy as-is.

The Meetings Management RFP Framework: What to include

1. Introduction & background

- Volumes and types (small internal, external, regulated, conferences, group travel).
- Geographic scope and languages.
- Current tools and pain points (visibility, manual effort, risk).
- Goals (savings, compliance, risk, experience, purpose/ESG).

2. Scope of services

- **Meeting types in scope:** internal/external; trainings; sales kickoffs; incentives; HCP/regulated; large conferences.
- **Geographies & departments:** rollout phases; languages; data residency needs.

3. Functional requirements <i>(For each, vendor marks: OOTB / Config / Custom / Not available)</i>	
Intake & governance: portal, approvals, MRFs, company calendar, budget approvals	
Sourcing: global marketplace (1M+ venue spaces), automated RFPs, side-by-side comparisons, clause variance alerts, rate/contracts, internal spaces.	
Registration & experience: sites in <24h, templates/cloning, multilingual, attendee types, consent, mobile apps, email/SMS, QR check-in, e-signatures, session scans, optional badge printing.	
Guest & group travel: air/hotel/ground; self-service & full-service; manifests; booking-window reminders; room blocks; folio reconciliation; two-way Concur/expense.	
Payments & reconciliation: virtual/lodge cards, POs, invoice OCR, anomaly detection, GL mapping, ERP integration, budget vs. actuals.	
AI: conversational intake; marketplace intelligence; autonomous RFPs; budget/recon assistants; predictive spend optimization; compliance automation; explain ability logs; sandbox; admin guardrails.	
Data & reporting: standardized model; real-time dashboards (spend, savings, risk, DEI, sustainability); APIs & data dictionary; BI exports.	
Security & privacy: SSO/SAML; SCIM; RBAC; audit logs; ISO 27001/SOC 2/PCI; GDPR retention/deletion; data residency.	
Sustainability, accessibility: venue sustainability filters; digital agendas; carbon tracking/offsets; accessibility data capture & venue disclosure; participation reports.	

RFP Template

Evaluation matrix (weights example)

- Functional fit (30%)
- AI & innovation (15%)
- Security & compliance (15%)
- Integration & scalability (15%)
- Implementation & support (10%)
- Cost & commercial model (15%)

3. Functional requirements <i>(For each, vendor marks: OOTB / Config / Custom / Not available)</i>	
Implementation & services <ul style="list-style-type: none"> • Timelines by meeting type; onboarding plan; train-the-trainer; change management; success plans. • Support model, SLAs, escalation paths; knowledge base; release cadence. 	
Commercials <ul style="list-style-type: none"> • Pricing model (per user/attendee/enterprise/hybrid). • Base vs. add-ons; implementation & training; support fees. • Contract terms (multi-year, termination); payment terms; discounts. 	
Vendor qualifications <ul style="list-style-type: none"> • Financial stability; global presence; references; awards/certs. • Roadmap cadence; customer feedback loops; deprecation policy. • ESG commitments & internal DEI/accessibility practices. 	
Proposal questions <ul style="list-style-type: none"> • How do you scale across all meeting sizes and workflows (DIY vs. managed)? • What AI features are live today and how is explainability enforced? • Provide quantified examples of savings, cycle-time reduction, compliance gains. • Outline your integration depth (two-way travel changes, expense mapping, HRIS/SSO, CRM, BI). • Describe your onboarding, training, and change management approach. • Share your security posture (evidence) and data governance. • How will our feedback shape your roadmap in the first 12 months? 	

groupize.ai

info@groupize.com | 508.232.7719 | groupize.ai

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