

## 8.5 STEPS TO SUCCESSFUL MEETINGS

This guide gives you an overview of the key steps involved in planning meetings. It brings you up-to-date on current challenges and opportunities facing those who plan meetings and gives you some of the tools available to help you meet those challenges.

Planning a meeting is like starting a company. You have to prepare a budget and manage a large amount of money, hire and train staff (possibly, even volunteers working on site), develop supplier relationships, approve contractual agreements, establish operating systems, develop, market and deliver the product, and prepare a report for your Board of Directors. When starting a new company, you generally expect to show a profit after several years of operation, however, meeting managers generally have six months to a year to show a profit. To accomplish the many goals of a successful meeting, efficient and effective management systems must be in place.

It's important to remember that all 8.5 steps are essential to creating that successful meeting.

- Step 1: Share Your Data
- Step 2: Managing the Process
- Step 3: Site Selection
- Step 4: Contracts
- Step 5: Food and Beverage
- Step 6: Keep It Interesting
- Step 7: Marketing Your Event
- Step 8: On-Site Requirements
- Step 8.5: Updating History

### Step 1: Share Your Data

STOP! Before you pick up the phone to call a hotel or convention center to inquire about space for your meeting, you need to be armed with information about your past meetings, which provides the framework for your current meeting needs. Effective decision-making requires data collection and analysis over a three to five year period.

The meeting planner reveals their hand when they have the first contact with the sales staff. If you have the following information, you will immediately be viewed as a qualified meeting professional. Your effectiveness will be influenced

by how you are perceived.

The following information should be available for a three to five year period.

- Dates of past meetings
- Pattern (days of week you prefer to meet)
- Location (city and facility)
- Total number of attendees by year
- Dollar amount spent at meeting facility
- Number and type of food and beverage events
- Number, size and set-up of meeting rooms utilized including staff offices, committee meetings, board meetings, etc.
- Number of hotel rooms "blocked" compared to the number "picked-up" (Room block = number of hotel rooms you reserved; Room pick-up = number of rooms actually used.)
- Special requirements such as AV, staging or any other item that will reduce the available space.

## **BUDGET**

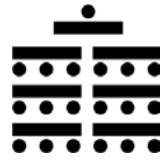
In addition to the historical data and the meeting room usage demands, the meeting budget is one of the key documents for managing the meeting and reaching financial goals. It is a well-accepted fact that associations must achieve a certain "profitability" from their meetings to support the annual professional activities and services provided by the association to its members.

The budget should and must guide ALL decisions. It should be on the top of the pile of papers on your desk, downloaded to your PDA and updated often. A budget projects all revenues and expenses and is often based on what you have done in the past. A budget often has a projected growth or decline percentage rate and has a miscellaneous category of about 10% of expenses to allow for the unknown or unexpected. Remember, budget expenses are better over-projected than under-projected, while budget income is better under-projected.

## ROOM SETUPS

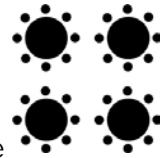
### Classroom or Schoolroom

This consists of rows of tables with chairs. It allows participants to take notes and spread out materials, but limits interaction with other attendees.



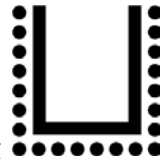
### Banquet Rounds

This is used for food functions and seats from 8 to 10 at a table. The ideal number of people per table is 8 to 9 at a 60-inch or a 66-inch round and 10 at a 72-inch round. Don't allow banquet staff to set the tables too close together or attendees will not be able to stand or exit with ease, and service staff will have difficulty moving between tables.



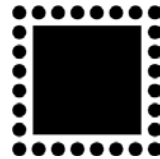
### U-Shape

U-Shape is a hollow square or rectangle with one side removed. When eye contact among attendees is essential, avoid long, straight lines of the tables and create angles to improve sight lines.



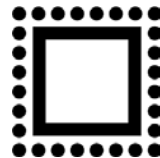
### Boardroom or Conference

Boardroom or Conference style is better for small groups that require a high degree of interaction, such as a board of directors, breakout group, committee, or staff meetings. The table can be rectangle or oval. This style accommodates an open and interactive meeting, but is not preferred for AV presentations.



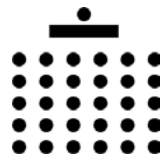
### Hollow Square

A hollow square is used when 13 – 30 people are in a classroom or conference-type setting. The more square the table, the shorter the sight lines to other attendees. This is not a good style to use if there will be a visual presentation, some people will have their back to it.



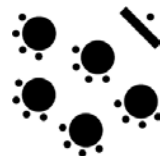
### Theater

This set-up maximizes meeting room space. Theater works well when the audience needs to take minimal notes or the presentation is 2 hours or less in length. As a rule, each chair should be no more than 10 chairs from an aisle.



### Crescent Rounds

This set-up is round banquet tables with chairs around one-half to three quarters of the table, facing the front. It's used for meetings where networking and note



taking are important. The setup is also a quick and easy solution for when a meal is followed by a presentation.

## **Step 2: Managing the Process**

The most qualified meeting managers have excellent organizational skills, are detail oriented and are able to meet deadlines. Because of the complexity of planning a event, it is important to have systems in place to help you meet your deadlines.

If time is taken at the beginning to set up good management systems, the benefits will be felt by everyone throughout the entire planning process. You do not have to do everything, but you are ultimately responsible for the success of the meeting.

## **PLANNING SCHEDULE**

One of the most valuable management tools is the planning schedule or timeline. This is essentially a master “To Do” list with due dates for each task and the name of the person assigned to complete the task.

The first step in preparing a planning schedule should be to list all tasks sequentially. Each day, the list should be updated to reflect new tasks and to evaluate progress on existing tasks. Over time, this list will comprehensively represent every aspect of your meeting.

## **EVENT TEAM**

In almost every association, there are staff members assigned to specific departments, such as accounting, marketing, etc. Someone from each area is usually assigned to provide support to the meeting department, or all too often, person.

Identify your team members early on. This will include coworkers, as well as association members or committees that have responsibility for some aspect of the meeting. Each team member should contribute ideas to the planning schedule and assist in determining deadlines.

## **COMMUNICATION**

While a formal method of communicating between team members must be established (such as e-mail, website, listserv, etc.), nothing replaces regular face-to-face team meetings. Often, at the start of the process, these team

meetings will be infrequent. But closer to the meeting, the need to meet more frequently is likely.

## **TECHNOLOGY**

There are numerous software programs specifically designed for meeting management (marketingpilot, meetingtrak, eventspro, etc.). You may also find that general office programs, such as word processing, spreadsheets, project management, calendar and e-mail programs work equally as well for you.

### **Step 3: Site Selection**

Armed with your historical knowledge, a well formed budget and a capable management team in place, it is time to begin the site selection process. This process includes initial contacts and inspections of the potential meeting sites, negotiations, and, ultimately, finalization of the contract.

## **INITIAL CONTACTS & INSPECTIONS**

If you know the city and facility preferred, initial contact will be made with the sales department a facility. If you have an established relationship with a sales manager at a property, that is likely the best place to start.

If you do not know specifically where you want to host your meeting, an ideal starting point is the State Tourism Office. From that point, you can collect information on cities of interest at their Convention & Visitors Bureau website.

## **TIPS FOR SITE SELECTION**

- Know the high, low and shoulder season. High season is the period when occupancy is highest, rates are highest and negotiations are most difficult. For the others, the opposite is true.
- Ask about the occupancy of the hotel during your preferred dates. A facility that is close to full occupancy will be less flexible in negotiations, and you will have less flexibility if your meeting requirements increase.
- Ask what other groups are booked during your preferred dates. Sometimes meetings can be booked that are not complimentary and

create distractions, such as groups with politically opposing views or different group dynamics, such as quiet versus noisy.

- Always ask about proposed construction or renovation at the site or adjacent to the site. This information may cause you to re-evaluate your choice or negotiate more attractive rates.
- Ask about off-site attractions and entertainment opportunities for your attendees when they are not in session.

## **NEGOTIATIONS**

First, you should establish your priorities. Make a list of those things that are critical to the success of your meeting. Next, identify those things that are desirable but not absolutely necessary. Finally, list those things that you are willing to give up.

This list will keep you focused on the critical items during negotiations. By asking for everything, you often get either nothing or things that are not as important.

## **TIPS FOR SKILLFUL NEGOTIATIONS**

- There is also an old saying that the meeting planner can have two of the following three things, but not all three: rates, dates, place. If you want low rates and have very specific dates, you will probably have to have the meeting in a place that is in low season. This is why the city is often booked with low budget groups in the summer. If you want specific dates and a highly desirable location, you will pay higher rates and so on.
- Hotels and meeting facilities are increasingly aware of the value of the piece of business you are bringing to the table. They will calculate a dollar amount that includes anticipated revenues from guest rooms, food and beverage functions, other on-site, sales such as equipment rental, and anticipated guest spending. A facility will be less negotiable if the piece of business falls below revenue expectations.
- The win-win philosophy has been around a long time and may be considered trite, but it carries an important message. If a facility is giving everything away in negotiations, they cannot continue to be profitable. Businesses that are not profitable do not have consistently good service and quality.

- If you book your meeting at a five star property during the low season, your attendees may benefit from the lower guest room rates, but the banquet menu prices rarely change in low season nor do most other meeting related charges. So, if your association is cost conscious, even during the shoulder or low season, a five star hotel may not be the best option.
- Guest room rates are usually negotiable if the meeting planner can document the pick-up from past years. Complimentary guest rooms to the association are a fairly standard practice for hotels, usually based on one room for every X guest rooms picked-up by the association.
- Meeting room rental fees in hotels are most often waived or reduced based on the total food and beverage expenditures and, sometimes, the number of guest rooms booked. If you have large volume and/or high dollar food events, you are more likely to have reductions in meeting room fees. Convention and Conference Centers (without guest rooms), as well as other facilities who do not have other revenue sources, are less likely to waive these fees.
- Food and beverage events are a direct expense for the facility and are rarely negotiable. The most effective strategy is to tell your Convention Services Manager what your budget is for each food and beverage event and ask what they can provide at that price. Some meeting planners think that by withholding food and beverage budgets they will get a better price, but the opposite is true. And remember as a rule, add 30% for tax and gratuity.
- Most facilities rent pipe and drape from exhibit companies; therefore, you are not likely to receive this complimentary.
- Modern AV, internet and telecommunication needs can often be complex. In many locations, this must be outsourced; therefore, reducing costs may not be an option. Some venues have basic equipment, such as microphones and general stage lighting, which may be negotiated.

## PEOPLE MOVEMENT BETWEEN SESSIONS

0 – 100 people.....	10-15 minutes
100 – 500 people.....	15-20 minutes
500 – 1,000 people.....	20-30 minutes

### Step 4: Contracts

A contract is a legally binding agreement and it must be taken seriously. If there is a dispute, both parties lose, because of the time, energy and money that each party spends to defend their respective positions. If the meeting planner approves the contract for signing, the association should show “reasonable care” in meeting the contractual requirements. Meeting planners should thoroughly review EVERY part of a contract...and then review it again. One may even wish to have the association’s attorney review the contract prior to signing.

The following quiz highlights specific elements of meeting and event contracts that you will encounter. Do you know the answers? Do you know where in the contract to find them?

### FACILITY CONTRACT QUIZ

1. What is the #1 error made when reviewing facility contracts?
2. What is a cut-off date?
3. What is an attrition clause?
4. What is a cancellation clause and when does it go into effect?
5. What are the two common types of dispute resolution?
6. What is a “guarantee policy” and when does it go into effect?
7. How can signed contracts be changed?
8. What is the penalty for breaking a contract?

SEE ANSWERS BELOW

### QUIZ ANSWERS:

**Disclaimer:** These explanations are not to be construed as legal advice but provide a lay person’s interpretation. An attorney should be consulted in all legal matters.

1. Not understanding the terms and conditions of the contract is the #1 error made.

2. The cut-off date is the date that your guest room block will disappear and all rooms not reserved will be returned to the hotel to sell through their general reservation system. Your attendees calling after this date will be able to make reservations only if space is available and often at a higher rate.
3. Attrition imposes penalties for not picking-up the number of guest rooms blocked for the meeting. Remember, the hotel has calculated the value of your business prior to the contract and, if you miscalculated, you will pay penalties following the meeting.
4. The cancellation clause is what happens when the entire meeting is cancelled. Typically, there are penalties, stated in the contract, based on the number of days prior to the meeting that the facility is notified of cancellation.
5. The two types of dispute resolution are (1) court of law and (2) arbitration. Court of law is self-explanatory. Arbitration is less expensive than going to court, but the focus is on resolving the dispute, not determining right and wrong. It is often conducted by a predetermined mediator/arbitrator. Arbitration decisions are binding and lack the appeal process of courts.
6. The facility contract will state the number of hours prior to a food and beverage event that a final number, "guarantee," must be given. This usually corresponds to the time the food must be ordered by the facility. The guarantee determines the amount of food ordered. After that time, you are required to pay for the number of meals guaranteed. Once you have given a guarantee, you cannot lower the number or expect to pay for fewer meals; however, you may be able to add a few.
7. An addendum can be added to the contract at any time but it must be agreed upon by both parties and signed by both parties.
8. These penalties are stated in each contract and may escalate as you get closer to the meeting dates.

## **Step 5: Food and Beverage**

### **"WOW" YOUR ATTENDEES**

Food and beverage and special events are a very important part of every meeting. It is important to find ways to WOW your attendees. If you ask attendees what they remember the most about a past meeting, it is usually a well themed event or special menu with great service. Creativity is actually more important than the money spent on the event. For example, if your meeting is in the fall you might invite the local university or high school band to march through the room playing the fight song; the coach might be interviewed about motivating the team and don't forget the cheerleaders and mascot. They are probably yours for a small donation. Your table decorations could be footballs, pom poms, or anything related to the theme. Your meal could be staged as a tailgate. Brainstorm with your staff to think of creative ideas that fit your budget.

### **CREATIVE VENUES**

Most cities have alternative venues particularly for special events. Play to the history of the venue. For example, many cities have renovated historic train depots which are equipped for special lighting, sound, and staging options. Most venues have historic homes or buildings appropriate for receptions. These events often have different food themes in different rooms that encourage guests to flow through the reception area. If you are near a city with Rails to Trails, plan a bicycle social or some other type of outdoor activity with trendy and healthy activities. Also, consider a free evening for dining at local restaurants. The goal should be to accent the uniqueness of each city so that the venue becomes a memorable part of the meeting.

### **CASH, HOSTED & TICKETED RECEPTIONS**

Receptions are less formal than seated dinners, encourage networking, and allow attendees flexibility in the time spent at the event. For the meeting sponsor, they can be expensive due to costs and liability exposure. A trend is to pay in advance for two drink tickets for each attendee. Once the guest uses the tickets, the bar becomes a cash bar. You can usually negotiate a fixed price for each ticket whether for a soft drink, beer, call brands and specialty drinks. There are three benefits: controls costs, limits liability, and moves attendees through the bar lines quickly, particularly during the first rush at the start of the reception. Also consider adding additional bars. While the "rule of thumb" is one bar per hundred guests, consider one per 75 with two bartenders at each bar. Long lines are one of the major complaints (and memories) of meeting attendees.

## SEATED DINNERS VERSUS BUFFETS

Seated dinners are faster and less expensive than buffets, but choices are more limited. If a buffet is required, discuss the number of stations, servers, and costs with the Convention Services Manager. Remember each buffet station must look as good for the last guest as the first.

## NON-ALCOHOLIC BEVERAGE YIELDS

Total Measurement Yield

1 Gallon .....	22 6-oz. cups
1 Quart (32 oz.).....	5 6-oz. glasses
1 Liter (35.6 oz.) .....	6 6-oz. juice glasses

## FIGURING ALCOHOL CONSUMPTION

Average bottle yields based on 1-1/2 to 2 oz. of liquor per drink or a half-filled wine glass.

Bottle Yield

Fifth .....	13-17 drinks
Liter .....	17-22 drinks
Half Gallon.....	32-42 drinks
Gallon (liquor/wine) .....	64-85 drinks or 32 glasses
Wine Bottle.....	6 glasses
Magnum (wine).....	12 glasses
Champagne Bottle .....	6-12 flutes

## TIPS FOR PLANNING FOOD & BEVERAGE EVENTS

- At receptions, guests eat fewer hors d'oeuvres if they are passed butler style, which helps control costs on more expensive items such as shrimp. From the attendee's perspective, this adds elegance to the event. Also, order larger quantities of a limited selection of hors d'oeuvres.
- To collect data for future events, prior to a seated meal, have a staff member count the number of seats or place settings. Following the function, count the unused napkins or clean place settings. By subtracting one from the other, you will get an accurate count of the attendance to guide future guarantees.
- Assign staff members to observe the type and amount of food on plates as they are returned to the kitchen. This will guide you in understanding guest's preferences.

- Avoid selecting menus from the printed banquet menus. It is more effective to share your food and beverage budget with your Convention Services Manager. List and prioritize each event as high, moderate or low importance. Ask the chef to prepare menus for each event that do not exceed your total budget. This is generally more effective than negotiating menu prices.
- Menu preferences are changing from the 101 ways to serve chicken. New trends include healthier breaks, lighter lunches, and fewer seated dinners. Ethnic cuisine has gained popularity, with Asian and Mediterranean leading the way. However, you must know your group. There are still attendees who prefer traditional meat and potato meals.
- Avoid offering salty foods during hosted bars.
- Instruct and remind facility staff that unless the event is extended by you, the event is to end at the specified time.
- Offer sponsorships to organizations for coffee breaks, receptions, and other food and beverage events.
- Save luncheon dessert for your afternoon break.
- Let the caterer create a custom meal.

## IMPORTANT QUESTIONS IN DETERMINING YOUR FOOD AND BEVERAGE NEEDS

What is the nature of the event (business meeting, awards ceremony, social fundraiser, gala dinner)?

Is the function part of a meeting, or is it a stand-alone event?

Will the event have a theme?

Will there be live entertainment?

Will alcohol be served?

What is the budgeted amount for the event?

What type of room set-up?

## FOOD ALLOWANCES

### Item Total Allowance

Hors d'oeuvres.....	5 to 8 pieces per person per hour (reduce by adding cheese or vegetable tray)
Nuts.....	3 lbs. per 100 people (with major hors d'oeuvres) 5 lbs. per 100 people (with minor hors d'oeuvres)
Dry Snacks .....	4 oz. per person
Cheese .....	3 oz. per person
Lunch.....	6 oz. meat portion per person
Dinner .....	8 oz. meat portion per person

## COCKTAIL ALLOWANCES PER PERSON

### Time Number of Drinks

Hour 1 .....	2 drinks
Hour 2 .....	1.5 drinks
Hour 3.....	1 drink
Total for three-hour reception .....	4.5 drinks

## Step 6: Keep it Interesting

Program design begins with a skeletal agenda broken down by days and times. You begin to pencil in the general sessions, breakout sessions, breaks, food and beverage events, special activities and so on. Next, you, other staff members or the program committee should brainstorm the topics and content for the sessions, possibly offering preliminary ideas about speakers/presenters. Topics generally identified as of "general interest" are designated for general sessions and topics of "special interest" are designated for breakout sessions.

## FORMAT

At some point, the discussion will move to the style or method of presenting the information. All too often, little thought is given to the format. The typical meeting is filled with speeches of 20 to 30 minutes, or a panel discussion, which is usually three speeches of 20-30 minutes led by a moderator. Too often meetings are overbooked with talking heads who speak about what they want to speak about rather than what the attendees want to hear or learn about. This is the reason meetings can be boring and more attendees are in the hall "networking" than in the formal sessions. And that is why many do not attend – they see them as a waste of time and, consequently, a waste of money.

## NETWORKING

Networking is a format, or method of interactive learning that is rarely designed into meetings. If there is not time for all the “topics” to be covered during the meeting, often the first thing cut is the time allowed for breaks and other networking opportunities. Ironically, networking is the reason many attend the meeting and is often the most valuable part of a meeting for attendees.

## TRENDS

The attention span of adults can best be gauged by watching television news and popular talk shows. Rarely is a person allowed to speak for more than 30 seconds or the speaker can expect to be interrupted or talked over if they exceed the allotted time. There is continuous movement between and among the guests and the moderator. The topics and/or questions are typically controversial in order to generate passion in the listeners. Even the set-up is like a living room or may have special sets strategically positioning guests in opposing positions. This “format” is based on well-grounded research on how to keep the attention of an audience so they will not channel-surf, analogous to networking outside the meeting room.

The time has come to change meetings so that they are responsive to the new styles of learning. You have to both educate and entertain (engage or involve) the audience. Those who do, will have a competitive advantage and will be perceived as leaders in the field.

Creative format options include hiring a local television personality to interview three or four people who have different views on an industry topic. Often high schools or universities have debate teachers who can help set up a debate between two speakers. You might even turn the tables and have the panel interview members of the audience. It takes a willingness to be creative in planning to have memorable meeting content.

Start with a psychological change. Dump the word “speaker” and use the new language – “guests” or “experts.” Select moderators based on their ability to control, manage, and direct the “guests” and the content. To assure that the needs and interests of the audience are met, be vigilant in managing the time and schedule. Reposition your priorities – your attendees are far more important than your speakers or guests.

## HELPFUL HINTS FOR TIME REQUIREMENTS

Breaks.....	15 minutes for 50 people or fewer
	• 30 minutes for 50-100 people
	• 30-45 minutes for 100-1,000 people
Allow 15 minutes for 100 cups of coffee (5 gallons) to be served from a coffee urn, less if waiters pour.	
Allow one coffee station per 50 people for groups under 500; one per 75 people for over 500.	
Lunch.....	45 minutes to one hour
Dinner.....	20 minutes per course; when accompanied
	by an event or show, allow three-four hours
Buffet.....	Allow one line per 50 people and 15-20 minutes per 50 people to go through the line
Cocktails.....	(Prior to dinner) 45 minutes to 1 hour
Reception.....	(As part of the program) 1 to 1-1/2 hours

## Step 7: Marketing Your Event

Event marketing has changed more than any other area of event planning in the last five or so years. The move has been from paper to electronic marketing. Fancy brochures, once buried under stacks of paper, are now only a click away. Websites, emails (even voice-enhanced emails) and podcasting are all providing potential attendees greater access to the meeting details and “any time, any place” updates on program topics, speakers, and special events.

Event marketing does not begin with the determination of dates for the annual meeting. It is a year-round affair. Some of the ideas below are predicated on the fact that you will spend the entire year exciting your potential delegates about what they can learn, who they can meet, and how valuable attendance at your event can be.

## FINDING HELP

There are numerous sites with free or low costs templates and tutorials for virtually any of the new electronic formats you want to add to your meeting’s marketing plan. The search words are obvious: blogs, podcasting, ebroadcasts, epublishing, eLearning, electronic marketing. Generally, you can put an e or an i in front of anything you want to search.

## **eREGISTRATION**

A great enhancement and cost effective option is electronic registration for the meeting. The registration process is completed and fees paid in a matter of minutes. And, stored in your files are ready-to-print name badges, event tickets, payment receipts and even financial reports. Additional value can be added through eRegistration. For example, a recent conference about the process of modern-day learning environments had each registrant complete a profile with key words representing professional interests, so attendees could begin "networking" from the moment the registrant hit SEND.

## **PREACHING TO THE CHOIR**

Unlike many marketing and advertising situations, associations have a base of members who annually, at membership renewal time, update personal contact information. This is a clearly defined target market, self-identified as interested in your product. The Internet allows you to frequently communicate with your members with short succinct messages that are more appealing in today's fast paced society.

## **RELATIONSHIP MARKETING**

Associations provide one of the most natural venues for "relationship marketing." What percent of your members attend your meetings? Is your marketing message targeted to your member's interests, responsibilities, tastes, preferences? Seek out their opinions and ideas, use them as resources and respect their knowledge and experience. Take full advantage of the marketing opportunities sitting in the files on your computer.

Generally, the highest cost for an association is recruiting first-time members. The longer the individual is a member, the lower the costs of keeping them and the greater the likelihood of customer loyalty. Building relationships within the membership should be the #1 strategic goal of the association. Loyal customers are more likely to be active participants in the association and utilize a wide range of its services.

As the members' perception of value increases, word of mouth referrals are generated and thus the association grows and the meeting grows. Relationship marketing requires that all aspects of the organization are operating in sync, so the benefits of attending the meetings are an integral part of the bundle of services offered by the association. The members of the association can be a very important factor to others of the association's credibility. In general, the people who attend your meetings are more important to potential attendees, the program content or the speakers. This completes the circle back to

networking as the #1 benefit of meetings to attendees.

Promote your most visible and respected members in your marketing through testimonials, blogs, features or any other avenues that give them visibility. As they say, you are known by the company you keep, so be sure your meeting is recognized as the place for professionals in your field to be!

## **COMMON MARKETING ACTIVITIES**

### **Early Announcement of Dates and Place**

- Announce the next annual meeting dates at the prior year's meeting
- Invite the next city to promote their venue by video at a reception or luncheon
- Mail or email "Save the Date" cards

### **Website**

- Put a link on your website to the Annual Meeting (remember to update it often)
- Profile speakers and program topics as they are confirmed
- Create a "blog" for pre-discussion of meeting topics

### **Early Registration Incentives**

- Offer "Early Bird" registration to build attendance and generate operating revenues
- Prepare a schedule for registration deadlines with escalating fees
- Offer incentives for pre-registration, such as a drawing for a complimentary registration or vendor-supplied promotional material (logo messenger bag, folio, etc.)

### **Use the CVB**

Use the local Convention and Visitors Bureau or Tourism Office in creative ways. They are just as interested as you in a well-attended event.

- Providing Save the Date postcards, including the postage
- Providing incentive items for attendance-building/early registration

- Arranging babysitting services or spouse tours that stimulate more attendance
- Providing and mailing destination guides to stimulate interest
- Providing City logo, promotional video and digital images for use in publicizing your event

## **Step 8: On-Site Requirements**

One of the most satisfying things about meetings is they have a beginning and an end, and you actually get to experience what you produced. The daunting part is that all the work and long hours over many months must come together perfectly in a period of three to five days.

Effective meeting managers strive to be prepared for every eventuality. That is why they document every step and create a master event document.

Preparing a document that includes every meeting detail requires the meeting manager to think through every element from arrival at the venue to departure. Meeting managers develop their own documents to meet their needs and in a format that is easy to follow. This document should contain all the information needed on-site.

Below is a description of the categories of items that can be included.

### **DETAILED EVENT REQUIREMENTS**

This is the most important component. It is laid out by date, hour, event, and meeting location. Each Event Details Document lists the entire requirements for that specific event from the room set-up, number of chairs, staging, audiovisual, food & beverage, even flags on the stage and flowers on the tables. Under each event, list each supplier and what they are providing. For example, an outside florist may be providing the flowers one day and the hotel on another day.

### **GENERAL INFORMATION**

This section serves as an introduction of your group to the venue staff and recaps basic information about the meeting. Common information includes a profile of the group, key staff with assignments, recapping of guest room block and rates, as well as other contractual information that you may need on-site, such as comp policy, Master Account billing instructions, authorized signatures, authorized charges, VIP and staff accommodations.

## **SPECIAL INSTRUCTIONS**

This section lets the venue know how you want them to handle specific situations during the meeting. For example, you may want the front desk to check with you before they “walk” one of your attendees or you may not want them to present invoices for signing to you at the function, but instead, in a private location.

## **RESOURCE DIRECTORY**

This is essentially a directory listing all of the contact information for every element of your meeting. You may have some of this stored in your phone, but a complete hard copy is good to have.

## **WHEN IS IT DISTRIBUTED?**

It is often sent to the venue 2-3 weeks prior to the meeting. The Convention Services Manager will transfer the information to their own internal forms called Event Orders (EO) used by the set-up crew and event staff. Banquet Event Orders (BEO) are for the food and beverage staff and key facility personnel.

## **FOR THE RECORD**

This is a great place to make notes throughout the meeting to remind you of changes you want to make in the future, to record actual charges for each event, to record final guarantees and actual attendance, and possibly the names of staff members who provide excellent service. It is also a very important reference when planning the next year’s meeting. This is even more critical because it will allow someone else to run the meeting in the meeting manager’s absence.

### **Step 8.5 Updating History**

The final step in successful meeting management is to organize all of the data from the meeting and prepare a final report. The final report is one of the most useful documents for future planning, if done correctly. It should have EVERYTHING in it you will need for the next meeting.

## **THE FINAL REPORT**

The Final Report should be treated with the same regard as an association or corporation’s annual report. The information should be graphically attractive and organized in an easy-to-follow style. Explanations should accompany any exceptions or unusual changes or circumstances.

## Types of information to include:

### Financial

- All financial information for three to five years displayed in a spreadsheet format.
- Explanatory notes describing why some costs have increased or decreased.

### Attendance

- Attendance by registration category for a three to five year period displayed in a spreadsheet format. This report easily shows areas of growth or decline.
- Daily meeting attendance compared to food and beverage function attendance. This allows the meeting manager to better project the behavior of the group when providing guarantees.

### Hotel Reports

- If asked in advance, the hotel can provide the meeting planner a daily pick-up report, but after the books close on that day, the data is often merged into a cumulative report. These daily reports are particularly useful in confirming complimentary rooms earned.
- Hotels have numerous other reports that they can provide, if asked in advance, such as food and beverage attendance, guest spending, etc. Ask what reports they produce and if you can receive copies.

### Marketing

- Registration records, if kept weekly, will provide a chart of when and how many registrations are received on a weekly basis, allowing the meeting manager to more accurately project registration and revenues and to make changes in marketing strategies.
- By charting the method of registration used by attendees (i.e., web, e-mail, telephone or mail), decisions can be made about the effectiveness of each method.

- Registration information when compared to hotel pickup, also collected on a weekly basis, provides valuable information during the site negotiation process.

### **Meeting Evaluation**

- Counting the attendees in each session and comparing to total event attendance allows the planner to identify popular topics and speakers.

### **SUMMARY**

This information is intended to be a guide in planning meetings. There are several other topics that could be researched, including Risk Management, Meeting Planner Certifications, Virtual Meetings, etc.