

# ***“MEETING PLANNING 101”***



***Program designed and facilitated by:***



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## ***"MEETING PLANNING 101"***

The meeting and convention industry has emerged as one of today's most significant sectors of commerce. Crucial to this field are **MEETING PROFESSIONALS**, who plan and produce well run conventions, meetings, seminars and expositions within their budget.

Meeting Professionals, sometimes called Meeting Planners or Convention Managers, are found in small companies, large corporations, professional associations and as independent entrepreneurs. Some are Executive or Administrative Assistants who in addition to their job, plan meetings.

The work performed by Meeting Planners can be divided into the following responsibilities, to name a few:

- ▶ *Program development*
- ▶ *Social Chairman*
- ▶ *Special Events Director*
- ▶ *Director of Training and Education*
- ▶ *Entertainment Director*
- ▶ *Housing Manager*
- ▶ *Speaker Bureau*
- ▶ *Nurse*
- ▶ *Food & Beverage Expert*
- ▶ *Set Up Specialist*
- ▶ *Miracle Worker*
- ▶ *Marketing and promotion*
- ▶ *Budgeting*
- ▶ *Site selection*
- ▶ *Negotiation*
- ▶ *Travel arrangements*
- ▶ *Entertainment and speakers*
- ▶ *Food arrangements*
- ▶ *Trade show management*
- ▶ *Guest programs*
- ▶ *Reservations and registration*
- ▶ *Audio-visual equipment*
- ▶ *Public relations*
- ▶ *Program evaluation*

Planners on a large staff may be assigned one specific aspect of the event such as budgeting or handling reservations and registration, while Planners who work for smaller organizations will often take responsibility for all phases of the event.

In workplaces with several Meeting Planners, three levels of professionalism exist: **the Facilitator**, **the Technician**, and **the Professional**. The Facilitator may be assigned basic tasks such as choosing menus and working with the chosen hotel on a variety of details. This worker is usually concerned with the physical needs of the attendees. The Technician is often responsible for running registration and reservations, selecting and setting up the site and operating the budget. The Professional designs and markets the event, creates the budget and oversees all operations. It is this top-level manager who is responsible for achieving the meeting's overall objective: **The communication goal of the client**.

Meeting Planners working within a corporation have a captive audience; they plan sales and incentive meetings or training seminars for their employees. Meeting Planners are solicited by hotels, conference centers and cities for their business. This solicitation is in the form of a "familiarization" trip to attract Meeting Planners to their city and facility.

When marketing is required, Meeting Planners may produce brochures and other publications, handle direct mail operations, and conduct surveys to give senior leadership feedback on the event.

The massive logistical operation of a large convention, trade show or exposition often starts as many as five years before the event, but in smaller corporate meetings, some meeting planners only have a few months to plan their sessions.

The first step is booking space in hotels or conference centers. Meeting Planners begin developing topics, choosing featured speakers and creating agendas. Much of the work also involves coordinating with other organizations and companies who will present programs to the attendees.



## EXERCISE TWO

Hands-on experience in your marketplace is valuable. The industry has changed a great deal over the past few years, which means the meeting planning industry has changed dramatically. Answer the following questions individually first and then discuss your individual answers with the entire team table.

1. *Compare the meeting planning industry of today vs. a few years ago.*

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2. *How is it the same?*

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3. *How is it different?*

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4. *What demands are your customers placing on you today that they didn't demand two years ago?*

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5. *If you are an independent planner, how are other meeting planners trying to take your clients from you?*

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6. *What attitudes, strategies and tactics will you need to embrace to continue to be successful in the future?*

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*Notes:*

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## ***PRE-PLANNING/SELECTING THE RIGHT SITE/ CONDUCTING EFFECTIVE SITE VISITS/BOOKING THE MEETING/"PRE-CONS"***

The first step in planning your meeting is to get buy-in from senior management and the "users" regarding the agenda and objective of the meeting. Too many new planners simply take a request from their boss asking for them to find "a place to hold the National Sales Meeting" without any real objectives or requirements discussed before the planner begins to call around to different hotels and venues.

It is critical to ask some very good questions of your "customer" (your boss, any VP in the company, or anyone asking you to book a meeting for them).

The following thoughts and questions will give you a guideline to use the next time you are asked to just "look around" for a site for a certain meeting.

1. *What is the purpose of the meeting (training, board meeting, incentive, sales meeting, etc.)?*
2. *What is the "theme" of the meeting?*
3. *What is the group size, gender mix, ages and special needs?*
4. *Determine first option meeting dates with other dates for second and third options depending on availability.*
5. *What dates should we avoid based on industry events and/or company events and holidays?*
6. *Outline the sessions day by day, including expected attendance, seating arrangements, setup times required, starting and ending times, and audiovisual and production needs.*



## EXERCISE FOUR

We have spent time talking about knowing your needs and what you value before we begin to plan. Let's take some time and identify some explicit and implied needs of a future meeting.

<b>EXPLICIT NEEDS</b>	<b>IMPLIED NEEDS</b>

## GETTING THE BEST DEAL

- ▶ *Prioritize what's truly important for your group's success before you enter into the negotiations.*
- ▶ *Ask about the facility's peak, off-peak and shoulder seasons, and the days of the week on which it would prefer to book business. If your meeting dates are flexible, you may be able to shift to a time slot providing greater leverage.*
- ▶ *Typically, hotels will give one complimentary room night for every 50 rooms occupied.*
- ▶ *Consider upgrades and/or special amenities and services as important as negotiating dollar savings. For example, upgrading VIPs/special guests to Executive Level rooms or suites at the group rate might be more important than obtaining a greater percentage off the room rate.*
- ▶ *Schedule negotiations early, ideally six months or more in advance.*

## ENHANCING YOUR MEETING'S VALUE

1. *Meet during a time period when business slows, such as holiday weeks.*
2. *Schedule a meeting within a gap in the property's schedule-between two other meetings or when there has been a cancellation or less than expected attendance from another group.*
3. *Alter your arrivals and departures to occur on days of the week when occupancy rates are typically lower (Thursday, Friday, and Sunday).*
4. *Choose a hotel that's reopening after renovations or acquisitions by new owners or a new property coming into the market, which often offers special rates to encourage business. (Note: Make sure your contract covers all contingencies in the event of incomplete renovations or properties that don't open as scheduled.)*
5. *List food and beverage requirements for each day including meals, receptions and breaks*
6. *Consider air and ground transportation needs*
7. *Plan entertainment and recreation needs, group activities and/or team building*
8. *Produce invitations, event promotion, registration and production of meeting materials*
9. *Designate an administrative person to create name badges and coordinate written material*
10. *Budget for all sponsor expenses and figure cost ranges for meeting participants' expenses*
11. *Research and book keynote speakers based on the theme of the meeting*

## SITE INSPECTION TIPS TO LOOK FOR...

- ✓ *Efficient, friendly doormen and bellmen*
- ✓ *Attractive, clean lobby that gives a welcoming effect*
- ✓ *Registration desk easy to find; sufficient space and personnel in relation to guest rooms; ability to handle peak check-in/check-out times for major groups; efficient front desk personnel*
- ✓ *Modern elevators in sufficient number to serve guests when facility is full*
- ✓ *Accessible, fully-staffed message and information desk; rapid response to telephone calls; quick delivery of messages*
- ✓ *Availability of guest services - proximity to drugstores, banks, emergency services, gift shop, concierge, safety deposit boxes*
- ✓ *Comfortable clean rooms, furniture in good condition, modern bathroom fixtures, adequate lighting, adequate closet space and hangers, smoke detectors, fire exit information clearly posted, refrigerator and/or wet bar*
- ✓ *Adequate lighting and cleanliness of hallways*
- ✓ *Availability of beverage and ice machines on each floor*
- ✓ *Service elevator accessibility*
- ✓ *Size of standard room versus deluxe room*
- ✓ *Availability of "towers" or executive floor offering enhanced guest services*
- ✓ *Rooms equipped for people with disabilities*
- ✓ *Number and types of suites and availability of suite floor plans*
- ✓ *Reservations procedures and policies*

- ✓ *Room category classifications (floor number, non-smoking, ocean view, etc.) and number available in each category*
- ✓ *Number of rooms available for early and late departures*
- ✓ *Current convention rate and rack rate for individual guests (not part of the group)*
- ✓ *Date hotel will provide firm rates*
- ✓ *Guarantee and deposit requirements*
- ✓ *Check-in and check-out hours*
- ✓ *Cutoff date for the room block*
- ✓ *Check-cashing policies and credit cards accepted*
- ✓ *Refund policy for cancellations*
- ✓ *Number of non-smoking floors (standard and concierge)*
- ✓ *Dates of any planned renovations*
- ✓ *Any change in hotel ownership being discussed*
- ✓ *Availability of health club, hours and cost*
- ✓ *Telephone access charges (long distance, local and calling card)*
- ✓ *Key system for guest rooms*
- ✓ *Adequate parking space (free or for a fee)*
- ✓ *Hotel emergency plan (meeting manager should review it)*
- ✓ *Hotel emergency exits clearly marked*
- ✓ *Comparison of king beds vs. double-double for double occupancy meetings*

## **NEGOTIATING**

Effective, high performance negotiating is important to the success of every kind of business or market segment. Whether you are a new meeting planner or an experienced meeting planner, the ability to improve your negotiating skills will move you to the top of your field. Skill building is the perfect way to refine your existing skills and even introduce some new thoughts on the subject of negotiating.

So how does negotiating fit into the overall planning process? It falls into place the minute you start to ask for concessions or changes in the normal contractual agreements in doing business with your organization. This can happen prior to the hotel/conference center sending a proposal, during the presentation of the proposal or after you have verbally said "everything looks great, send me a contract."

Even when you have agreed to give the facility the business, you still have to be prepared to negotiate terms and conditions on almost every meeting. When this occurs, knowing what you value and what the hotel/conference center values is important in order to work toward a mutually satisfying solution.

### ***Negotiating requires three essential attributes:***

1. *A genuine desire to take the interaction to a conclusion where both the customer and the sales person mutually benefit and win*
2. *A carefully conceived plan with all of the parameters established prior to the meeting*
3. *The necessary patience to work through the difficult parts of the negotiation without losing sight of the final goal*

This session will take you through the steps necessary to negotiate a meeting by giving you an opportunity to answer several preparatory questions prior to developing a negotiating plan to use with your hotel/conference center vendors.

In many industries, the word "negotiating" is used to mean lowering a price, giving an "override," "comping" something for the customer or giving something away. Strategic negotiating places the sales professional in a position to really negotiate with the customer toward a win-win conclusion. The significant difference is that this negotiation while centering on price, product or contractual agreements, will allow you and the hotel/conference center to work together to mutually solve problems and reach the best agreement for both parties and establish a better relationship in the long run. This mutual agreement will significantly impact your relationship with the hotel/conference center both now and in the future. Negotiating requires that you use your communication skills throughout the encounter. One of the most important skills is the use of LEAP© in handling objections.

## **L.E.A.P. = LISTEN - EMPATHIZE - ASK - PRODUCE**

### **LISTEN -**

- Shows empathy
- Active listening
- Care

### **EMPATHIZE -**

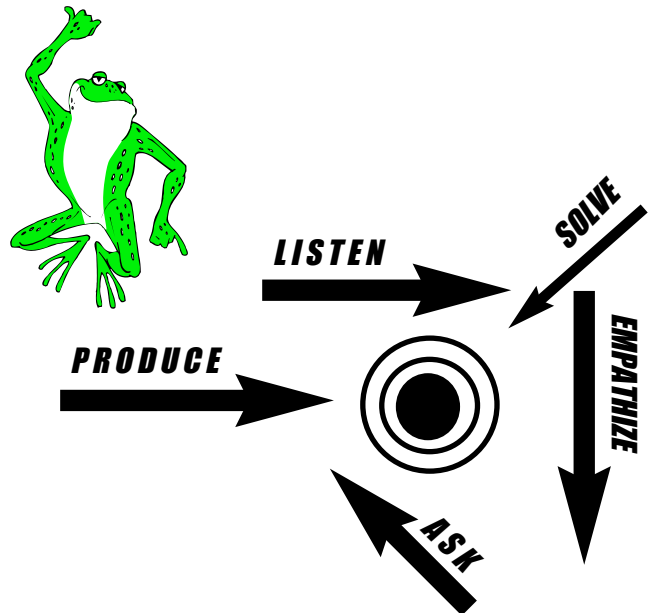
- Shows sensitivity
- Acknowledges what was heard
- Support and concern

### **ASK -**

- Clarify understanding
- Explore options
- Ask for client's help

### **PRODUCE -**

- A solution
- Recommendation
- Next step



By careful planning and knowing what issues are important to both the customer and the hotel/conference center, you can enter the negotiation with the knowledge that you both can win. The hotel/conference center will win because they will solve your problems, and you will win because you have negotiated a fair value for your company.

Your goal is to plan your meeting by negotiating with a mindset of:

- ✦ ***TRUST***
- ✦ ***CREDIBILITY***
- ✦ ***FLEXIBILITY***
- ✦ ***CANDID CONVERSATION***
- ✦ ***THE ABILITY TO PARTNER***
- ✦ ***THE KNOWLEDGE TO KNOW WHEN TO "WALK AWAY"***

***THINK ABOUT HOW YOU WOULD ACT  
IN THE SALESPERSONS'S SHOES!***

## Negotiation Parameters

**What's the minimum the hotel/conference center can offer (and keep the customer happy?)**

**What's the maximum the hotel/conference center can offer (and keep the hotel/conference center happy?)**

### “Quid Pro Quo”

What the hotel/ conference center will offer	What the customer can give	Tactics
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

## RESOURCE LIBRARY

### MAGAZINES

- ✓ *Meetings & Conventions*
- ✓ *Successful Meetings*
- ✓ *Incentive*
- ✓ *Meeting News*
- ✓ *The Meeting Professional (MPT's magazine)*
- ✓ *Insurance Planner*
- ✓ *Convene*
- ✓ *Corporate Meetings & Incentives*
- ✓ *Meetings West, North, South, etc.*
- ✓ *Fast Company*
- ✓ *Fortune*
- ✓ *Forbes*
- ✓ *Business Week*
- ✓ *Training & Development*

### BOOKS

- ✓ *Meeting & Event Planning for Dummies*  
- Susan Friedman (approx. \$20)
- ✓ *Meetings and Conventions: A Planning Guide*  
- Sandy Biback CMP, CMM, Angela Harvey CMP
- ✓ *Complete Idiot's Guide to Meeting Planning*  
- Robin E. Craven and Lynn Johnson Golabowski (\$20)
- ✓ *The Business of Event Planning:  
Behind-the Scenes - Secrets of Successful Special Events*  
- Judy Allen (\$30)

**International Association of Conference Centers (IACC)**

*Checklists - From Professional Convention Management Association*

**[www.pcma.org/resources/resources/checklist/check/](http://www.pcma.org/resources/resources/checklist/check/)**

**[www.hotelonline.com](http://www.hotelonline.com)**

**[www.realtimehotelreports.htm](http://www.realtimehotelreports.htm)**

**[www.mpoint.com](http://www.mpoint.com)**

American Society of Association Executives (ASAE) 202-626-2723

**[www.asaenet.org](http://www.asaenet.org)**

International Association of Conference Centers (IACC) 314-993-8575

**[www.iacconline.com](http://www.iacconline.com)**

Association of Corporate Travel Executives (ACTE) 703-683-5322

**[www.acte.org](http://www.acte.org)**

Society of Government Meeting Planners (SGMP) 703-549-0892

**[www.sgmp.org](http://www.sgmp.org)**

National Business Travel Association (NBTA) 703-684-0836

**[www.nbta.org](http://www.nbta.org)**

**[www.starcite.com](http://www.starcite.com)**

**[www.meetings-conventions.com](http://www.meetings-conventions.com)**

**[www.successfulmtgs.com](http://www.successfulmtgs.com)**

American Society of Training & Development

**[www.astd.com](http://www.astd.com)**

**[www.pcma.org/resources/resources/checklists/check](http://www.pcma.org/resources/resources/checklists/check)**

**Convention Industry Council**  
8201 Greensboro Drive, Suite 300  
McLean, VA 22102  
(703) 610-9030  
(800) 725-8982  
Fax: (703) 610-9005  
[www.conventionindustry.org](http://www.conventionindustry.org)

**Meeting Professionals International (MPI)**  
International Headquarters  
4455 LBJ Freeway, Suite 1200  
Dallas, TX 75244-5903  
(972) 702-3000  
Fax: (972) 702-3070  
[www.mpiweb.org](http://www.mpiweb.org)

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Fax - (949) 589-2758  
[www.masterconnection.com](http://www.masterconnection.com)

Workshop Name/Date \_\_\_\_\_

## MASTER CONNECTION ASSOCIATES WORKSHOP EVALUATION

PLEASE INDICATE YOUR DEGREE OF AGREEMENT WITH THE FOLLOWING STATEMENTS  
BY PLACING A CHECK-MARK (✓) ON THE BAR UNDER EACH.

**(1= STRONGLY DISAGREE, 5= STRONGLY AGREE)**

1. I will be able to integrate the workshop content into my daily routine.

1 \_\_\_\_\_ 5

WHY?

\_\_\_\_\_  
\_\_\_\_\_

2. I will be able to do my job better because of what I learned in the workshop.

1 \_\_\_\_\_ 5

WHY?

\_\_\_\_\_  
\_\_\_\_\_

3. The workshop subjects will contribute to my growth and development.

1 \_\_\_\_\_ 5

WHY?

\_\_\_\_\_  
\_\_\_\_\_

4. The balance between the lecture and participation was appropriate.

1 \_\_\_\_\_ 5

WHY?

\_\_\_\_\_  
\_\_\_\_\_

5. The workshop experience was worth the time invested.

1 \_\_\_\_\_ 5

WHY?

\_\_\_\_\_  
\_\_\_\_\_

6. What changes or comments, if any, would you make to this workshop?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you or someone you know may be interested in learning more about our additional services and workshops, please check off the areas of interest and list contact information.

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