

# ***“MEETING PLANNING 201”***



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



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## ***"MEETING PLANNING 201"***

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.

Sometimes hundreds of vendors will exhibit their services or products. Some of the important skills, attitude and knowledge that Meeting Planners should demonstrate include the following:

- ▶ *COORDINATION SKILLS*
- ▶ *SPEAKING IN FRONT OF A GROUP*
- ▶ *MOTIVATING OTHERS ON YOUR TEAM*
- ▶ *PROBLEM SOLVING SKILLS*
- ▶ *ACTIVE LISTENING SKILLS*
- ▶ *CREATIVITY*
- ▶ *TIME MANAGEMENT*
- ▶ *SERVICE ORIENTATION AND KNOWLEDGE OF GREAT SERVICE*
- ▶ *COMPUTER SKILLS & KNOWLEDGE*
- ▶ *KNOWLEDGE OF USING THE INTERNET TO SEARCH*

Some Meeting Planners have many other responsibilities other than just managing the meetings. They need to be able to multi-task and balance all of their responsibilities with a calm nature. The job, however, can involve a considerable amount of standing, lifting, walking, and kneeling when preparing materials and directing the set-up for the event. Many Planners travel regularly on the job, some internationally. The pressure of keeping track of hundreds of details before and during an event can be mentally exhausting for some people.

Education is critical to this job, and workshops like "**Meeting Planning 201**" give new planners a good overview of the job, but many of today's Meeting Planners who began their careers as administrative assistants are now becoming certified in the position. The occupation has become increasingly professional over the past several years.

To qualify for the Certified Meeting Professional (CMP) exam, candidates must have worked full time for at least three years with a wide variety of meeting planning experience. Although certification is not required for this occupation, it will likely be an advantage when competing for better jobs. The Certified Meeting Manager (CMM) certificate is earned through an advanced training program usually lasting one week and successful analysis and completion of a detailed case study. Meeting Professionals International administers both exams.

Continuing education is not required to maintain a position as a Meeting Planner; however, successful Meeting Planners regularly attend seminars, workshops, conventions and trade meetings as well as look at trade journals and Websites - to keep abreast of trends in the industry.

Examples of this are as follows:

- ▶ *A widespread certification program (CMP - Certified Meeting Planner)*
- ▶ *Several professional organizations (MPI - Meeting Planners International; PCMA - Professional Convention & Management Association; ICP - Insurance Conference Planners; and many others)*
- ▶ *A growing core of knowledge to master*
- ▶ *Budgets that can run into the millions of dollars*

Planners must be familiar with using the Internet to search for air and hotel arrangements and/or research sites and availability for their events. They also need to be knowledgeable about the Americans with Disabilities Act (ADA) so they can ensure everyone has adequate access to, and seating for, the event.



## 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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## **EXERCISE THREE**

As a team, discuss the different types of meetings you plan and the types of locations you tend to use for these meetings. While discussing these meetings and thinking about the above research, also discuss what is important to you in planning your meetings.

<i>TYPE OF MEETING</i>	<i>TYPE OF LOCATION</i>	<i>IMPORTANCE</i>

Using the Internet will save you a lot of time in looking for sites to hold your meetings. Make sure you then contact the hotel or conference center and begin working with a professional Sales or Conference Planner to ensure a successful meeting. Here are some ideas on using the Web to improve the Pre-Planning:

1. **LOCATE VENUES.** One of the most practical ways to use the Internet is to locate hotels, convention centers, and other venues for upcoming meetings and events. There are excellent meeting planning resources that allow you to search for hotels throughout North America and the world.
2. **FIND INDUSTRY SUPPLIERS.** Whether you need an audio-visual company, destination management firm or some other type of supplier, there are many resources to help you quickly identify the right vendor.  

◆[www.pcma.org/resources/resources/checklists/check](http://www.pcma.org/resources/resources/checklists/check)
3. **HOT DATES/HOT RATES.** One of the most popular ways to use the Web is to search for special offers being promoted by venues. These "hot dates" services are of particular value if you are searching for meeting space to accommodate an event within the next few months.
4. **SEND ONLINE REQUESTS FOR PROPOSALS.** Many hotels, conference centers and convention and visitor bureaus have added Request For Proposal (RFP) systems. In some instances, you simply complete a short online form with the basic requirements for your upcoming event and e-mail it. In other cases, you can take advantage of full-fledged request for proposal management systems that allow you to save, update and send detailed meeting specifications.

5. **LOCATE INDUSTRY CONTACTS.** The Web makes locating names and contact information easy, with a number of industry-wide sites including searchable databases.
6. **NETWORK WITH INDUSTRY COLLEAGUES.** Message boards are a mainstay of the online world. Many industry and association Websites include message boards to place questions and comments about industry issues.
7. **IDENTIFY SPEAKERS.** Professional speakers were among the first group of meeting industry participants to embrace the Web. To find speakers, you can either visit individual speakers' Websites directly or access centralized Websites that list hundreds of speakers.
8. **CHECK FOR CITYWIDE EVENTS.** Wouldn't it be nice to know if any citywide events are planned for the same dates in the same city as your next annual meeting? It's easy to find that information on the Web: Just visit an event search engine, such as TSCentral ([www.tscentral.com](http://www.tscentral.com)) to locate producers that are staging events in specific cities during certain time periods.
9. **LET ATTENDEES BOOK ROOMS ONLINE.** Slowly, more and more convention producers are allowing attendees to book hotel rooms via the Web. Delegates can visit a conference Website and then click to make housing reservations.
10. **LINK TO TRAVEL AND TOURIST INFORMATION.** The Web is full of great destination and tourist websites. One way to provide your attendees with helpful destination information is to add links to your Website so that attendees can access a wide variety of resources for drawing maps, obtaining weather reports and finding out about local events.



## **THIRD PARTIES**

Third parties are organizations that can help a corporate planner, administrative assistant or even an independent small planner in handling a large meeting. It is good to know what third parties are available.

- ▶ FULL SERVICE MEETING PLANNING COMPANY
- ▶ SITE SELECTION COMPANY
- ▶ CONVENTION VISITOR BUREAUS
- ▶ DESTINATION MANAGEMENT COMPANY (*often referred to as a DMC*)
- ▶ INCENTIVE COMPANY
- ▶ REGISTRATION COMPANY
- ▶ PRODUCTION COMPANY

Before hiring a third party, know your objectives and goals to make the relationship most effective. The following items will give you a guideline to use when thinking about using a third party.

- ▶ *What do you need the third party to do?*
- ▶ *Clearly define expectations for third party.*
- ▶ *Begin working with the company as soon as possible.*
  - ✓ *Once you have a specific meeting to plan, don't start calling hotels to book space and then bring in a third party*
  - ✓ *Many hotels pay commission to third parties and it is easier to begin that process right from the start*

- ▶ *How does the company charge for their services?*
  - ✓ *Consulting Fee*
  - ✓ *Hourly plus expenses*
  - ✓ *Paid commission by hotel/vendor*
  - ✓ *Consulting Fee for defined number of hours then hourly*
  - ✓ *Establish discounts or rebates for referrals*
  
- ▶ *Give third party timeline and goals-continually check progress*
- ▶ *Who will pay deposits, master account, vendors, etc?*
- ▶ *Have third party present bills/expenses in timely manner*
- ▶ *Interview two or three companies*
- ▶ *Check references of Third Parties with customers and hotels*
- ▶ *Communicate/meet on a consistent and regular basis*
- ▶ *Determine how information is to be presented by third party*
- ▶ *Will company also be providing staff onsite? Is it included in fee?*
- ▶ *Find all hidden costs; i.e. tax rates in different states*
- ▶ *Where to find Third Parties?*
  - ✓ *Referral*
  - ✓ *Professional Organizations (MPI, HSMAI SITE, etc.)*
  - ✓ *Internet*
  - ✓ *CVB or Hotel recommendation*





## CATERING

If you are working with a hotel you will work with either catering or conference services in planning your meals. The one benefit of working with a conference center is dealing with one "Conference Planner" who will plan all of your meetings including the food & beverage. From custom menus to special dietary requests, all venues should be able to customize a menu for you that will meet the needs of your attendees. Keep in mind that creativity is critical when planning your menus. Try to avoid repetition and remember to avoid heavy starch and sugar in the afternoon.

## VIP GIFT AMENITIES

Any hotel or conference center can arrange for your VIP attendees to receive custom gift baskets, deluxe cheese and fruit displays, chocolate delicacies with assorted cordials and much more. Try to know your VIP's preferences so you do not send chocolate to diabetics and alcohol to alcoholics. Knowing what your guest's like is the first step in creating a warm welcome to your guests.

## MAKING COST-EFFECTIVE CHOICES

- ▶ *Tie your menu in with that of a larger group or to the restaurant specials.*
- ▶ *Evaluate the cost and time savings for a small group to eat in a private section of the restaurant, as opposed to having a catered meal.*
- ▶ *Spell out when guarantees will be due, usually within 48 to 72 business hours prior to the event.*
- ▶ *Write into the contract what the "overset" will be. An overset is the number of people the facility will set tables and places for the above guarantee. This amount varies from 0 to 5 % or more; the industry average is 3 %.*
- ▶ *You will usually be billed for the guaranteed number or the number served, whichever is greater.*
- ▶ *Find out what service charges and/or gratuities will be added to the price of the meal and taxed, to avoid any surprises.*
- ▶ *Don't compromise on quality. If your budget is restrictive, review the number of food functions you are planning and consider any economies.*
- ▶ *Consider flowers, decorations and entertainment. Your hotel can provide ideas for floral arrangements, table and room decor and quality entertainment.*

## PLANNING THE MEALS

- ▶ *Allow enough time at all food and beverage events for people to eat leisurely, network with colleagues and enjoy the presentation, if any.*
- ▶ *Generally allow 30 to 40 minutes for continental breakfast, 45 to 60 minutes for full breakfast, 45 to 60 minutes for lunch, and 20 minutes per course for dinner. For refreshment breaks, allow a minimum of 15 minutes for up to 100 people, 30 minutes for up to 1,000 people and 30 to 45 minutes for groups larger than 1,000.*
- ▶ *Plan on two cups of coffee or tea per person for a morning break and one cup of coffee/tea or one soda per person during an afternoon break.*
- ▶ *Consider a luncheon buffet for small group working sessions. Buffets offer variety and faster service. Some properties have minimum requirements for buffets, so ask in advance about buffet minimums and additional fees.*
- ▶ *Consider requesting one server for each table, for more formal meals and/or VIP tables.*
- ▶ *Most facilities allow one server for every two tables, for standard, three- or four-course dinners and one server per three table for lunches. Check with the facility to determine if there will be additional labor charges for the extra servers.*
- ▶ *Check with facility about estimated time for meal service to determine proper scheduling for speakers, awards, etc.*
- ▶ *Consider pre-setting desserts or salads to speed service to accommodate programs.*
- ▶ *Always plan to serve a variety of foods during cocktail receptions, that are healthy, current with trends and offer visual appeal.*
- ▶ *Provide one bartender for every 75-100 people, if you have bars.*

- ▶ *Consider offering hosted liquor for a limited time frame or limited number of drinks per person to control liquor costs.*
- ▶ *Offer festive, nonalcoholic beverages in addition to beer, wine and premium brands of liquor.*
- ▶ *Ask if there can be a donation of leftover food to homeless shelters or distribution organizations for the needy.*
- ▶ *Consider wine service with dinner as an alternative to a full bar service to control costs and provide a more elegant atmosphere for dinners.*
- ▶ *Depending on the size of the wine glass, you will typically get 4-5 glasses of wine per bottle and should allow 1-2 glasses per person for dinner service.*

## DÉCOR/CREATIVITY FOR FOOD & BEVERAGE EVENTS

- ▶ *Ask about linen, centerpiece and buffet décor that is available through the host facility.*
- ▶ *All types of décor are available from vendors for rent for special events and can greatly enhance the atmosphere.*
- ▶ *Think "outside the box" for meal centerpieces. Items such as client's products or merchandise can provide an cost effective, creative alternative to flowers.*
- ▶ *When renting décor items, ask for referrals from catering or conference service managers.*





## POTENTIAL BUDGET CHECKLIST

### **SITE SELECTION**

- Researching sites, including costs of directories, software, etc.
- Preparing and distributing requests for proposals
- Travel, housing, ground transportation, and other site visit costs

### **STAFF**

- Salaries and benefits for permanent staff
- Wages for temporaries
- On-site expenses for travel, housing, and other costs
- Custodial, security, electrical, audiovisual, and other contracted

### **PROMOTION**

- Production and distribution of promotional pieces and other delivery vehicles
- Telephone
- Advertising costs
- Registration/housing confirmations

### **PRINTING**

- Forms for registration (*and housing if done in house*)
- Tour and special event order forms
- Tickets for meals and special events
- Program agenda booklet
- Badge blanks and holders
- Special handouts and announcements
- Banquet menus and programs if separate from program booklet
- Enclosures, order forms, and other items in registration packets
- Exhibit programs (if separate from program booklet)
- Special invitations
- Materials for divisions, committees, board members, special interest groups
- Published proceedings, abstracts, etc.

### **PROGRAM PLANNING:**

- Committee meetings, telephone, mailing, duplicating, etc.
- Expenses of speakers: honoraria, amenities, travel, other
- Audiovisual services
- Rent for meeting rooms
- Special events, entertainment
- Golf or other sporting events
- Decoration
- Signs
- Awards
- Flowers

## **PROGRAM PLANNING (con't)**

- Food and beverage
- Office furniture and equipment
- Staging
- Registration equipment
- Telephone
- Press room
- Simultaneous translation and audience response equipment

## **EXHIBITS, PROMOTION, COMMUNICATION, CONTRACTS, ROOM RENT, DECOR, HOSPITALITY, CUSTODIAL, AUDIOVISUAL**

- Duplication: manuals, lists, regulations, charts, etc.
- Drayage
- Electrical
- Storage
- Office

## **SPOUSE, CHILDREN, GUEST PROGRAMS, COORDINATOR EXPENSES**

- Gifts and amenities
- Program
- Transportation
- Entertainment
- Committee expenses
- Child care
- Insurance
- Signs

## **MISCELLANEOUS**

- Office supplies
- Insurance
- Taxes
- Shipping
- Storage
- Gifts
- Shuttles, limousines, and other transportation Accounting
- Legal services

\* PCMA Convene March 2004

## 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)

- 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.realtimhotelreports.htm](http://www.realtimhotelreports.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)

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[www.mpiweb.org](http://www.mpiweb.org)

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[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.

ON-LINE SALES REINFORCEMENT TOOLS

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