

Site Inspection Checklist

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It's an urban jungle when you're on a site inspection. The folks in your office think it's easy. You know better. You have a tough job to do, but you've heard there's someone out there you can trust, someone who knows the landscape. His name is Leonard Hoyle, but his friends call him Buck, and he's willing to spill his guts about what he's seen and heard from his 40 years in the biz, from a thousand site inspections and 500 limo rides.

Be the Attendee

Site inspection is often the biggest impediment to effective site selection, because too often the attention is placed on the wrong priorities and purposes. What often happens on a site inspection trip to a hotel? The property sends you the plane tickets, perhaps for first-class seating, if they really want your business. When you get off the plane, soon you see someone with your name on it. He takes you to a limousine, and he drives to the hotel, sometimes taking a special, faster route, because he does this all the time. Someone at the hotel greets you by name, because they've been expecting you. For you, there's no waiting in line at the check-in desk. They whisk you directly to your room, which often is a suite with a food basket at the ready.

You'll be taken on a tour of the better rooms and the new, tower portion of the hotel, instead of the original building and its rooms, which overlook the garbage cans. You walk through corridors that have been cleared in advance — there aren't any food trays outside the doors.

There's nothing sinister about this; the hotels want to show you the best of the property. But it means that you're not experiencing the hotel like an attendee.

Do this: After taking the tours and eating in the wonderful restaurants, and being taken by limo back to the airport, go back. Check in at the same hotel or the one next door, and do your own tour.

Know Your Goals

The goals and objectives of the meeting will dictate site selection. Different goals require different sites and facilities: If the goal is excitement and entertainment, you might need a special venue like a theater. If the goal is recreation, you might require athletic fields. If the goal is education and reflection, you would require a property with few distractions. If the goal is networking, you need big spaces to meet and mingle.

Beyond the meeting's goals, you need to consider the following:

- Location. Where is your membership based? If you're east of the Mississippi and your members are on a tight budget, stay in the East.
- Your five-year meeting profile. Keep accurate records for every meal and event.
- Demographics. Your membership is always changing in some way. Capture and analyze your group demographics; this will enable you to make adjustments to the way you are doing things.
- Finances. Develop a budget and figure out what factors have contributed to financially successful meetings in the past.

Get Deep Inside

Do a SWOT analysis. Evaluate locations based on strengths (easy to get to, good reputation), weaknesses (too expensive, no volunteers in the area), opportunities (place that would draw new members, new experience), and threats (other meetings in town that would drive up costs, a risky location that could affect you or your organization if it doesn't work). Here are other factors for your analysis:

- Getting there. What are the cost and the ease of getting to the location?

How does it relate to member needs? You might be able to get great rates in a northern city in the winter, but can your members get there and back on time?

- Seasonal economics. You do a lot better on rates in Miami in August than in February or March, for example.
- Geographic flow: Do you have to move your meeting around in order to satisfy everybody, or can you keep your meeting in the same location?
- Cultural perception: How will your attendees view a city or a property? Many of us read about beautiful new facilities. We like to bring our people to new places. On a site visit, the facility is gorgeous and operating well. But make sure you look around. Many times new facilities are built in unsafe areas because the land is less expensive.

Remember that the attendees are in your care, and they're not going to stay in the hotel and convention center the entire time. You want them to be able to walk around and be safe. Wait a few years before taking your meeting to that new hotel or convention center. New development will happen around the facility, and it will be a much more inviting location.

- Local resources. Resources are people such as the convention bureau, the chamber of commerce, the mayor's office, and the police and fire departments. How willing are they to work with you?
- Friends and allies. You have them in every city. For example, an ally might be someone who just had a meeting in the same facility. Planners always are happy to share their knowledge with others in the same situation. Take advantage of their experience.
- Costs. What are the costs of labor, and what are the taxes?

- Competition. What groups are going to be in town at the same time?
- Overflow. Is there overflow space, in case you attract great attendance? Look at the properties around yours and the value they provide.
- Rates. This means more than the hotel rates. It's food and beverage, sleeping rooms, meeting rooms, parking, flowers, photographers. There are probably 35 or 40 rates to consider.
- Dates. If your meeting is June 15-17, protect rooms for June 13 and 14, because that's when you, your staff, and your organization's leadership likely will arrive. If your attendees like to stay over for other activities, look at availability for the dates after your meeting.
- Space. People need and want a break from being inside. Is there space for activities outside the hotel?

Look Closely

When touring a hotel, make sure to consider the following.

- Available sleeping and meeting rooms. A 500-room hotel might have only 380 rooms available because of agreements with airlines or other customers.
- Meeting-room charges. Don't assume that meeting rooms in a hotel are going to be free. Conference rooms might be, but ballrooms might not.
- Attrition clauses. Negotiate these with great care.
- Other groups in the house. Ask about this early.
- Exclusive contracts with service companies. It's very possible that the hotel has an exclusive contract with a florist or business center, for example. But you might be able to negotiate rates.
- Complimentary-room policies. One complimentary room for 50 paid is typical, but the ratio can slide, depending on how badly the hotel wants your meeting.
- Drayage and storage policies. What does it cost to move materials within the facility? How long will the property store materials that are sent for the meeting?
- Remodeling. Ask what's being planned at the property and in the area. Will a wrecking ball be crashing into the building next door during your board meeting? (This has happened.)
- Security. Will you need it at the exhibit hall, the front door, the parking lot? What will it cost?
- ADA. Ask to see the facility's certificate of compliance.
- Credit and payment policies. Never settle for a contract that requires you to pay on-site. You will be too distracted to go through the master account while on-site. Give yourself at least two weeks to pay so that you have the time to review the master account carefully.
- Cleaning and maintenance policies. What are their schedules for the exhibit halls and the room corridors?

- The back of the house. If you see swinging doors, walk through them. Go look at the loading dock and the kitchen. Its appearance could give you insight into how the facility as a whole operates.
- The meeting rooms. Are there chandeliers in the ballroom that will affect projection? Are there beams that will affect availability? Is there a room suitable for a board meeting?
- Parking. Are there enough spaces, and where is the lot?

Final Instructions

Finally, here are miscellaneous tips that will result in a better meeting:

- Deal with the decision-maker. Talk with the person who signs the contract. Otherwise you're wasting your time.
- How many and what kind of attendees are you going to deliver? If you're bringing 100 influential church leaders and decision makers who might bring groups to the property, you have leverage.
- The process. After you've made your site visits, prioritize your favorites and begin negotiating with your top choice, keeping in mind how good or bad your second choice is in comparison.
- Find a colleague for site inspections. On the first day, you cover a group of locations in a city, and your friend visits others. You meet for dinner to compare notes. The next day you flip-flop the visits. You will garner much more information than if you do the visits alone.
- Be wary of surrogate site inspectors. If the meeting is important enough to you, do the site visit yourself. You are responsible for the meeting's success, and nobody else knows what you're looking for better than you