

# Meeting & Event Planning FA2

Presented by: Lee Ann Adams Mikeman  
Co-Chair, NBTA Groups & Meeting Committee

June 6, 2008  
9:00 a.m. – 10:15 a.m.



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# Meeting & Event Planning Session Objectives

- Learn the 10 steps to organizing a successful meeting or event
- Understand how the smallest details can have huge impacts on program outcomes
- Discuss Best Practices in event planning
- Hear 'Helpful Hints' on how to manage meetings professionally and efficiently



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# 10 Steps to Successful Meeting & Event Planning



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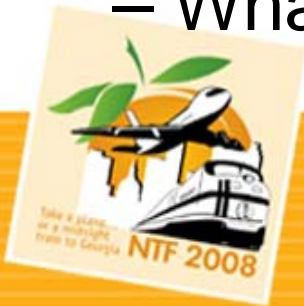
# Goals & Objectives



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# Goals & Objectives

- Determine the following when developing goals/objectives:
  - What is the purpose of the meeting/event?
    - training, team building, management, marketing
  - What type of meeting/event is it?
    - international, domestic, incentive, client,
  - Who are the attendees?
    - internal, external, combination, guests, spouses
  - What is the anticipated outcome?



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# Goals & Objectives

## Best Practices

- Establish goals and objectives prior to the start of the planning process
- Obtain stakeholder buy-in
- Create a draft agenda and schedule early
- Make sure the location and meeting type compliment one another
- Determine if a facilitator will be required



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# Budgeting & Approval



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# Budgeting & Approval

- Draft budget to include:
  - Attendee per diem and transportation (air/ground)
  - Conference hotel and venue expenses
  - Group food and beverage costs
  - Materials (printed programs, CD's/flash drives with presentations, name badges, signage, etc.)
  - Meeting management company fees
  - Miscellaneous - Audio-Visual (AV) equipment, entertainment, production costs, mementos and amenities



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# Budgeting & Approval

## Best Practices

- When estimating costs, note assumptions
  - Include a 5% buffer for unexpected expenses
- Determine if attendee registration fees will be required and collected
  - If so, process payments via a secure PCI DSS system (Payment Card Industry Data Security Standard)
- Obtain management authorization before jumping ahead in the planning process



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# Supplier RFP's



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# Supplier RFP's

- Create a list of suppliers required and prepare RFP's
  - Venue, accommodations, AV, food/beverage, ground transportation, mementos, etc.
- Collect and evaluate a minimum of 3 bids (required per SOX)
- Compete event facilities and services; will save 10% to 20% on total program costs



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# Supplier RFP's (contd.)

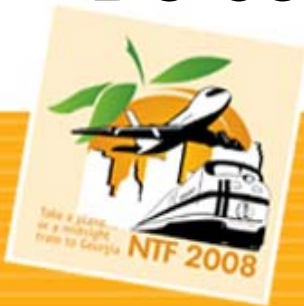
- Include preferred dates – optional dates
- Sleeping room requirements
  - Room type, single/double, suite, VIP
- Meeting space requirements
  - Meeting room set-up (theater, classroom, conference, etc.); # of rooms, times, etc.
- Food and beverage requirements



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# Supplier RFP's – Best Practices

- Provide as much detail as possible
- Send electronically, preferably through an established meeting technology system
- List alternate dates if preferred dates are unavailable; flexibility can save big bucks
- Allow adequate lead time for supplier questions and responses
- Be consistent in process; builds credibility



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# Proposal Evaluation & Selection



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# Proposal Evaluation & Selection

- Establish a deadline to receive all supplier proposals; if one gets extension, all should
- Develop scoring/selection criteria
  - Price, availability, service, location, contract language (terms/conditions), quality (5 star)
- Score proposals and document for audit
- Make supplier selections based on scores



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# Proposal Evaluation & Selection Best Practices

- Keep good records; document evaluation/decision process
- Inform bidders regarding win/lose decision
- Provide an opportunity for bidders to ask questions regarding rationale for decision
- Use scoring criteria as a guide in responding to supplier queries



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# Contract Negotiation & Risk Assessment



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# Contract Negotiation & Risk Assessment

- Negotiate rates, dates, space, concessions, amenities, terms/conditions
- Use historical data to strengthen position
- Assess risk and purchase Special Event insurance, if necessary
- Consider attendee waivers if risky activities are planned (rafting, sky-diving)



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# Contract Negotiation & Risk Assessment (contd.)

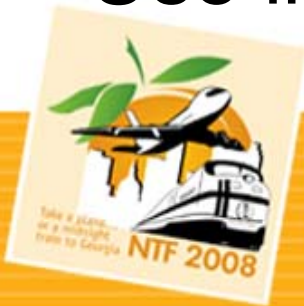
- Leverage volume spend where possible (contract for two meetings vs. one)
- Best days to get government per diem – Monday's, Friday's, weekends, holiday weeks; avoid mid-week meetings to get best deals
- Beware of seasonal demand challenges
- Include 5 key clauses in contracts (your language)
  - Cancellation, Attrition, Indemnification, Force Majeure, Insurance



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# Contract Negotiation & Risk Assessment – Best Practices

- Don't sign contracts unless authorized
- Ensure all procurements are clear and transparent
- Maintain a high standard of ethical conduct and professionalism
- Don't accept gifts from suppliers
- Use internal resources to help (Legal, Risk, etc.)



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# Planning & Coordination



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# Planning & Coordination

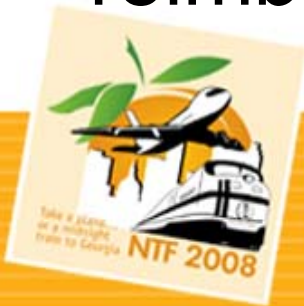
- Update budget from original estimate
- Develop attendee invitations, registration website, agenda, spouse program, etc.
- Manage hotel sleeping room block
- Create food/beverage menu (be prepared to accommodate special needs)
- Coordinate AV equipment/services
- Organize group air/ground transportation



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# Planning & Coordination (contd.)

- Select speakers and collect presentations
- Finalize conference facility arrangements
- Coordinate graphics, name badges, entertainment, maps, schedule, mementos
- Think 'Green Meetings'
- Provide logistics information to attendees
- Arrange for honoraria and/or per diem reimbursement for guest attendees



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# Planning & Coordination

## Best Practices

- Follow Task Timeline closely
- Hold regular planning meetings with internal support team and a 'Pre-Con' with key suppliers and facilities prior to meeting/event
- Use technology wherever possible to streamline tasks and track participation



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# Onsite Management & Execution



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# Onsite Management & Execution

- Ensure attendee Registration Desk and/or Information Desk is provided/staffed
- Establish a common communications network with the hotel and other service providers (e.g., cell, walkie-talkie) to address real-time issues
- Address security concerns and facility access prior to group arrival; if special badges are required, prepare in advance
- Have a 'Speaker Ready' room for presenters



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# Onsite Management & Execution (contd.)

- Have a security plan and protocol in place in case of emergency
  - A list of key names/phone #'s should be distributed to all support personnel and management
- Pre-register and key VIP's with hotel
  - Request early check-in and verify billing arrangements are being handled appropriately
- Ensure adequate parking is available and discounted rates are being honored, if applicable



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# Onsite Management & Execution Best Practices

- Test facilities/services prior to group arrival and make sure things are working according to plan
- Check venue master bill periodically to ensure no erroneous charges arise
- Walk-VIP sleeping rooms and conference rooms in advance of group arrival



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# Billing & Payments



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# Billing & Payments

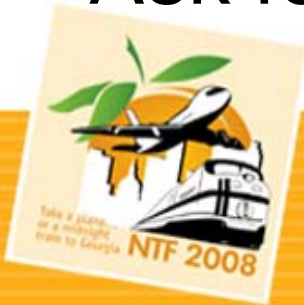
- Collect and review all supplier invoices
- Verify that all facilities, food/beverage, and other services were received
  - Cross reference invoices with contracts to ensure concessions were received and correct rates were charged
- Pay bills and allocate to cost centers (if necessary)



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# Billing & Payments – Best Practices

- Avoid paying deposits if possible
- Pay invoices 'NET 30' or 'NET 45' from date invoice is received
- Use central charge card to make all supplier payments;
  - May be able to get a rebate from credit card company depending on volume and 'turn time'
- Ask for all back-up before paying bills



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# Post Reporting



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# Post Reporting

- Run attendee reports via meeting technology system
  - StarCite, Cvent, GetThere, Arcanio, etc.
- Provide key statistics to management
  - Total # of attendees
  - Total # of attendees who participated in specific meetings and special events (dinners, receptions, award ceremonies, etc.)



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# Post Reporting (contd.)

- Verify sleeping room pick-up with hotel was achieved
  - Provide list of attendees to hotel for cross-referencing purposes; get 'shoulder date' credit for early/late arriving guests
- Assess co-pays collected from attendees and credit appropriately to project



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# Post Reporting – Best Practices

- Get hotel room pick-up and food/beverage revenue report for historical tracking
- Maintain attendee information and other statistical data for future benchmarking and analysis
- Keep reports in central technology system for audit purposes



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# Survey & ROI Evaluation



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# Survey & ROI Evaluation

- Survey attendees within few days of event
- Make sure survey is easily measurable and questions are short and specific
- Conduct 'Lessons Learned' meeting with staff and review event performance
- Assess if goals/objectives were achieved
- Send 'Thank You' letters to key suppliers



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# Survey & ROI Evaluation – Best Practices

- Don't skip the survey phase --- this will facilitate future meetings/events and increase the chances for greater success
- Share positive survey results with management and use feedback to shore up funding for future activities
- ROI analysis enhances program credibility



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# Helpful Hints and Highlights



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# Helpful Hints and Highlights

- Develop a detailed Task Timeline
- Create a Day of Event Schedule
- Prepare a 'Smoke Card' – List of key players, cell #'s, email addresses
- Use check-lists to track status/progress
- Establish a Staffing Plan specifying areas of responsibility



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# Helpful Hints and Highlights (contd.)

- Bundle 'meeting/event' buys for better discounts with suppliers
- Consider non-peak periods/seasons for best rates
- Be careful with Banquet Event Orders (BEO's) --- they are contracts too!
- Use technology wherever possible



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# Helpful Hints and Highlights (contd.)

- Don't sign anything unless authorized to do so (the fine print could surprise you)
- Mitigate risk and liability wherever possible
  - Special Event Insurance
  - Cancellation clause with re-book option
  - Reciprocal Indemnification
- Adhere to a strict Code of Ethics



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# Helpful Hints and Highlights (Contd.)

- Communication is key; Hold regular meetings with support staff and key suppliers to review timeline
- Don't underestimate the value of advance planning; it always pays off!
- Use available resources and maximize chances for success



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# Miscellaneous Resources



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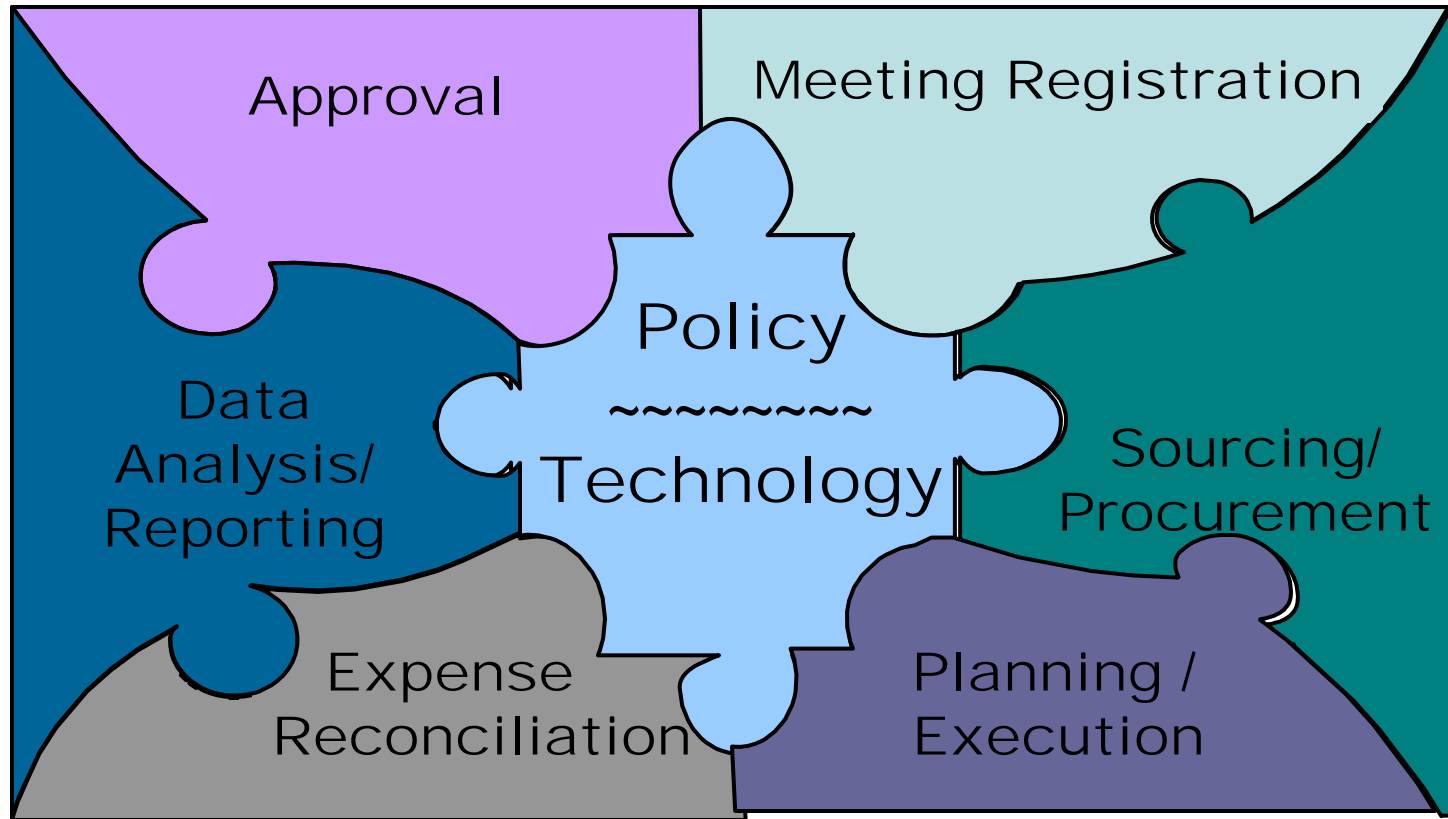
# GSA Training – Conference Planning: Course 1780

- This course teaches students the new travel regulations on conference planning, allowing agencies to increase per diem and pay for light refreshments. Course discussion includes deciding where to hold meetings and conferences nationwide, obtaining proposals, estimating budget costs, using approved hotel accommodations, agency requirements for conferences, what's included in room rates, and the best times to hold conferences.
- **Intended audience:** Meeting planners and other personnel involved in meetings and conferences.
- **Cost:** \$450
- **Length:** 4 hours
- **Location, Course Session, #, Dates:**
- **Washington, DC** 1780-02 Jun. 4, 2008; **1780-03 Aug. 20, 2008**



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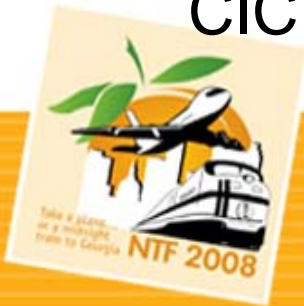
# Strategic Meetings Management Program (SMMP)



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# Associations/Resources

- National Business Travel Association
  - [www.nbta.org](http://www.nbta.org) (Groups & Meetings Committee)
    - Critical Meeting Components Papers
      - Hotel and Air
      - Ground Transportation
      - Destination Management Companies
      - Venues
      - Speakers (coming soon)
- Society of Government Meeting Professionals
  - SGMP - [www.sgmp.org](http://www.sgmp.org)
- Meeting Professionals International
  - MPI - [www.mpiweb.org](http://www.mpiweb.org)
- Convention Industry Council
  - CIC - [www.conventionindustry.org](http://www.conventionindustry.org)



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# Operational Differences Travel vs. Meetings

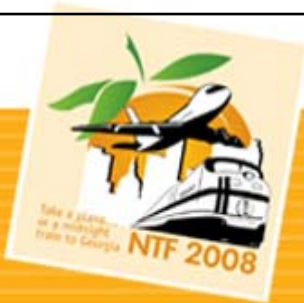
Component	Travel Program	Groups and Meetings
<b>Largest Spend Category</b>	<ul style="list-style-type: none"> <li>• Airfare</li> </ul>	<ul style="list-style-type: none"> <li>• Hotel (rooms, F&amp;B, space)</li> </ul>
<b>Preferred Supplier Programs</b>	<ul style="list-style-type: none"> <li>• Predictable volume buying</li> <li>• Robust, mature programs</li> </ul>	<ul style="list-style-type: none"> <li>• High variability to buying</li> <li>• Few or no programs</li> </ul>
<b>Master Agreements</b>	<ul style="list-style-type: none"> <li>• Annual or multi-year agreements</li> <li>• Based on volume &amp; market share</li> </ul>	<ul style="list-style-type: none"> <li>• Localized demand conditions make annual contracts more challenging</li> <li>• Difficult to move market share due to variables and planner's influence</li> </ul>
<b>Booking Process</b>	<ul style="list-style-type: none"> <li>• 1 online booking tool</li> <li>• 1 or few agencies</li> </ul>	<ul style="list-style-type: none"> <li>• Online booking occasionally used</li> <li>• Few to multiple suppliers</li> </ul>



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# Strategic Differences

Component	Travel Program	Groups and Meetings
<b>Organizational Structure</b>	<ul style="list-style-type: none"> <li>• Usually centralized</li> <li>• Aligned with procurement</li> </ul>	<ul style="list-style-type: none"> <li>• Often decentralized</li> <li>• Less procurement involvement</li> </ul>
<b>Policy</b>	<ul style="list-style-type: none"> <li>• Established &amp; explicit</li> <li>• High awareness</li> <li>• Better enforcement</li> </ul>	<ul style="list-style-type: none"> <li>• None or loosely defined</li> <li>• Low awareness</li> <li>• Minimal enforcement</li> </ul>
<b>Controls</b>	<ul style="list-style-type: none"> <li>• Mandates more accepted</li> </ul>	<ul style="list-style-type: none"> <li>• Difficult to mandate</li> </ul>
<b>Spend Data</b>	<ul style="list-style-type: none"> <li>• Expense reporting</li> <li>• Other internal systems</li> <li>• Fairly accurate and complete GDS and supplier reports</li> </ul>	<ul style="list-style-type: none"> <li>• PO or invoices into accounting system</li> <li>• Individual meeting budgets</li> <li>• Likely incomplete supplier reports</li> </ul>



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# Audience Discussion

## Q & A



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# Thank You!



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