

# THE PRACTICAL GUIDE TO MEETING PLANNING



Regardless of whether you're an experienced or entry-level meeting planner, you need to be aware of the best practices that have evolved in the industry over the years. This guide will help you create and keep track of the goals for your meeting, room layouts, budgets, F&B needs, timetables and myriad other details. What follows is a compilation of some of the best lists, tips and guidelines culled from past Plan Your Meetings issues and LIVE Events, updated by our editors, advisory board and contributors. For more industry news, tips, trends and advice, visit [PlanYourMeetings.com](http://PlanYourMeetings.com).



## DEFINE YOUR MEETING

Clarify the purpose. Get the history. Establish the goals and objectives. Create a complete meeting profile — spend time upfront gathering the basic information to build a good foundation.

1. What is it? A new product launch, an annual board meeting, an incentive trip, a sales meeting or a social event? What are the goals?
2. Who wants this meeting? Who is the decision maker? Who are the stakeholders?
3. Who will be attending? Why are they coming? What are their expectations? Where are they coming from? What is the age range, and are the majority male or female? Are they bringing family or guests? Are there any special needs?
4. What have they done before? What worked and what didn't? What was the cost of past meetings? Where have they had meetings in the past? Do they want to do something entirely different?
5. Don't forget to ask the people who didn't attend last year's event why they stayed home. Knowing that can help you create an irresistible event that they must attend this year.



## CREATE A BLUEPRINT

A blueprint will shape your event and can serve as a selling tool. Whether you make a formal proposal to a client or simply need to report back to your corporate committee or manager, you should prepare a structured proposal.

### A COVER LETTER MIGHT INCLUDE:

- Objectives and preferences
- Demographics
- Geographical information
- Budget parameters
- Meeting structure
- Summary

### THE PROPOSAL SHOULD CONTAIN THE FOLLOWING:

- Destination review
  - Transportation plans
  - Site information
  - Room breakdowns
  - Food and beverage information
  - Entertainment and other activities
  - Day-to-day itinerary with grid overview
  - Cost summary sheet
  - Planning timetable
  - Detailed program inclusions (spells out what is included in cost summary sheet: e.g., site inspection, promotion, airfare, hotel accommodations, décor, special effects, room gifts, communication costs, etc.)
  - Program options and enhancements (i.e., CSR/sustainability initiatives)
  - Other things to add: historical information (if applicable); destination brochures; location photos; hotel/meeting room layouts; brochures from restaurants, caterers and entertainers; promotional items; sample invitations; and, depending on your relationship with the client, your company profile and references. If you are going to be responsible for securing sponsors and marketing the event, include that information as well.
- (Note: If you need supporting materials on a city and its attractions, contact the CVB.)*

## DEVELOP THE BUDGET

The meeting budget is an estimate of expenses and anticipated income (if your event is profit-driven). It provides financial control and accountability. Armed with the meeting's objectives, you can begin to develop a worksheet covering all categories. Reviewing last year's budget, if available, will make your job easier.



### LIST ALL FIXED AND VARIABLE COSTS:

#### VENUE

- Meeting or event space rental
- Room setup/breakdown costs
- Equipment rental and setups
- Taxes and gratuities

#### ACCOMMODATIONS

- Rooms
- Hospitality suite
- Taxes and gratuities
- Other fees (read the contract carefully)

#### FOOD & BEVERAGE

- Per-person food costs
- Beverages
- Breaks
- Setup/cleanup
- Staff
- Taxes and gratuities
- Fees (read the BEOs carefully)

#### PRINTING/DIGITAL COMMUNICATION

- Invitations/confirmation cards
- Website/social networks
- Meeting/pre-registration kit
- Online registration
- Agendas
- Handout copies
- Signage, banners, tickets
- Internet

#### AUDIO/VISUAL

- Computer rentals
- A/V equipment
- Other technology
- Setup/breakdown fees
- Gratuities

#### PROGRAMS

- Field trips
- Tour guides
- Team-building
- Sports fees
- Health club fees
- Gratuities

#### SPECIAL SERVICES

- Decorations/florals/props
- Messengers
- Photographers
- Entertainment
- Speakers' fees and gifts
- Linens/laundry

#### TRANSPORTATION

- Airfare
- Taxis or limos from airport
- Shuttles
- Parking
- Valet
- Gratuities
- Other

#### ADMINISTRATION

- Accounting services
- Advertising and promotion
- Insurance
- Legal services
- Postage/shipping
- Security
- Staffing
- Supplies (notepads, nametags, etc.)
- Telephone
- Gratuities
- Other

### LIST ALL REVENUES:

- Audio tapes, books, videos
- Event fees
- Exhibitors
- Grants
- Web/Mobile advertising
- Product sales
- Program advertising
- Sponsors
- Other

### 8 EXTRA TIPS

1. Keep track of how you arrived at each budgeted item.
2. Allow contingencies for the unexpected (about 10 percent to 15 percent).
3. Have a credit card with the right limits on it. Discuss payment with all venues ahead of time, and make sure the staff knows who gets the bill.
4. Have cash on hand for tips and other emergencies.
5. Make sure to keep track of actual costs against budgeted costs for each line item in a spreadsheet.
6. Keeping track of how much money you've saved helps prove your worth to the company.
7. Keeping track of how much money your group spends on hotels, incidentals and F&B can prove the worth of your business.
8. Keeping track of how much business your attendees have given past exhibitors and sponsors will help prove the value of your event.



## SAVE TIME, MONEY

1. Visit Ez.com/pymzn and read about our innovative solution to the pain of sourcing venues.
2. Follow the links to our intuitive RFP builder.
3. Search comprehensive list of venues. Select favorites. Compare side by side.
4. Click to submit RFPs.
5. Receive bids within a few hours. Select winner.
6. As you go to contracting phase, other bidders are notified and thanked.



## PREPARE THE RFP (REQUEST FOR PROPOSAL)

After you establish the meeting's goals, outline the agenda and know the budget, you are ready to approach meeting facilities with a request for proposal. (You are asking them to bid on your requirements.) RFPs can be completed online, using meetings-specific software, through a CVB or over the phone. Whatever method you use, be specific. An RFP can be one to 10 pages, but make sure it is clean, clear and precise. This document represents you, your company and your reputation. It is paramount to be ethical; remember you want to foster long-term relationships. Respond to vendors in a timely fashion and be flexible.

### INCLUDE THE FOLLOWING:

- Contact information (name, title, address, phone, fax and email) and preferred method of communication (phone, email)
- Company information (name, address, website, phone and fax)
- Event dates and alternative dates
- Event start and end time
- Number of attendees and, if property, number of rooms needed
- Preferred location of event (city, state and area of town)
- Venue requirements (hotel, resort, special facility, restaurant, etc.)
- Type of event (meeting, wedding, social, reception, product launch, etc.)
- Food and beverage requirements (passed hors d'oeuvres, buffet, seated, etc.)
- Off/on-site requirements (caterer, entertainment and setup)
- Audio/visual requirements (sound, stage, lighting, screen, microphone, laptop, etc.)
- ADA requirements (shuttles, ramps, parking, etc.)
- Time requirements (deadlines for proposals, deposits, vendors, etc.)
- Estimated budget (includes money allocated for event, F&B, venue, travel, A/V, etc.)
- Additional details (sustainability/CSR initiatives, breakout rooms, patterns, etc.)

## DO SITE INSPECTIONS

Go through the RFPs you've gotten back and eliminate the vendors and properties that won't work. Schedule site inspections with your top prospects. Ask questions. Take notes.

### BASIC INFORMATION NEEDED:

- Name of hotel or venue
- All contact persons with information
- Cancellation policy
- Fees
- Deposit required
- Group rate for rooms
- Meeting room rates
- Banquet facilities and menus
- On-site caterer
- Business services
- Audio/visual services
- Parking
- Bandwidth/connectivity

### AMENITIES

- What "green"/CSR initiatives are in place?
- Does the hotel have executive/club floors offering special guest services? Business center, printing, free Wi-Fi, etc.?
- Is there a pool, health club and/or a spa? Are they complimentary? Are group rates available? What are treatments and prices?
- What attractions are on-site or nearby?

### FOOD & BEVERAGE

- What are the standard group offerings for meals and breaks? Can menus be created or tailored to your group? (Collect menus.)
- Are taxes and gratuities included in F&B costs? Are extra charges applied for events that run over schedule?
- What are the local liquor laws?
- What on-site dining venues are available?

## GUEST ROOMS

- What is the total number and type of rooms in the hotel and the maximum number that can be committed to the meeting? What are the room categories (nonsmoking, ocean-view, etc.), and how many are available in each category? Are smoking rooms close to nonsmoking, or are there nonsmoking floors?
- Determine the cut-off date for room reservations and room blocks as well as check-in/check-out times. Will rooms be available for early arrivals and late departures? Establish how many days before and after the official meeting dates special lodging rates apply.
- What are the guarantee and deposit requirements? What is the refund policy for cancellations/attrition?
- If confirmed rooms are not available, will property provide overflow housing at a comparable property for the conference rate and provide free transportation between the properties?
- How many complimentary rooms are issued for units occupied before, during and after the meeting dates?
- Specify the number of rooms needed for staff, speakers and VIPs. Ask what the criteria are for obtaining free, more discounted or higher-quality rooms.
- Request the rate structure for both single and double occupancy, with and without taxes. Be sure there is an understanding about how sales and use taxes will be billed or avoided.
- Ask if the rates apply to children staying in the same room.
- Review services such as hot/continental breakfasts, newspapers, Internet access, resort amenities, local phone calls, etc. Negotiate to have them included at no extra cost.
- Ask whether there is space available to store luggage after checkout but before departure from the conference. (This service should be provided free.)
- Inspect the guest rooms. Are they comfortable and clean? Is the furniture in good condition? Is there balcony furniture? Are the bathroom fixtures modern? Are robes and other amenities (bottled water,

shampoo, hair dryers, irons, etc.) provided? Do rooms offer adequate lighting (check and make sure light bulbs are working), closet space and hangers? Are the rooms wired for Internet access? What services does the TV offer (DVD, conference news, Web access)?

## THE LOBBY

- Are the front-of-house staff (doormen, concierge, reception, etc.) efficient and friendly?
- Is the registration desk easy to find? Is there staff to handle busy check-in/check-out times for major groups? Is there a separate group check-in area?
- Is the lobby inviting? Check the cleanliness of public restrooms.
- Check the availability and location of guest services such as ATM machines, gift shop, safety deposit boxes, etc.
- How far is the lobby from the self-park lot?

## MEETING ROOMS

- Walk the space. How long does it take to get to and from rooms?
- What technology is available? Are there fees for not using in-house A/V?
- Are rooms adequately soundproofed?
- Are lighting controls in the room and easy to use? Is the room comfortably well lit? Can it be darkened?
- Are temperature controls in the room, and easy to use? Is the air-conditioning quiet?
- Do meeting rooms have high ceilings? Are columns or obstructions a concern? Can rooms be set up in the seating styles required?
- Is adequate space available in or near the meeting rooms for breaks?
- Does the hotel have in-house or preferred suppliers for A/V, florals, etc.?
- Does the facility have any theme decorations or props you can use? Are they free of charge?

## 13 EXTRA TIPS

1. Prepare in advance: Visit websites.
2. Take pictures or video with camera or phone.
3. Bring someone along: another pair of eyes helps.
4. Create a timeline from when you first experienced the property until the day you leave.
5. Eat a meal at the property and sample on-site catering menus.
6. Get to know the key employees: the general manager, concierge, director of security, chef, etc.
7. Discuss concessions but be ethical, honest and realistic about your budget and expectations.
8. Make an unannounced visit to the property.
9. Stay overnight. Order late-night and early-morning room service. Arrange a wake-up call, and keep a checklist of all services.
10. Use speedtest.net to test Internet speed and bandwidth in rooms and meeting space.
11. Are any renovations planned? Will the work interfere with your meeting?
12. If you're visiting an unfamiliar city, also schedule tastings with potential caterers and meetings with other suppliers, as well.
13. you can't attend a site visit in person, see if you can find a local planner through an online community like PYM or MeCo or an association like MPI to do the inspection and send you their notes/impressions.



## INDUSTRY WEBSITES

- [Asaecenter.org](http://Asaecenter.org)  
American Society of Association Executives
- [Conventionindustry.org](http://Conventionindustry.org)  
Convention Industry Council (CIC)
- [Ez.com/pymhangout](http://Ez.com/pymhangout)  
PYM's G+ community for meeting planners with monthly online video chats and broadcasts.
- [Gmicglobal.org](http://Gmicglobal.org)  
Green Meeting Industry Council
- [laap-hq.org](http://laap-hq.org)  
International Association of Administrative Professionals
- [Ises.com](http://Ises.com)  
International Special Events Society
- [Meetingscommunity.com](http://Meetingscommunity.com)  
MeCo listserv
- [Mpiweb.org](http://Mpiweb.org)  
Meeting Professionals International
- [Pcma.org](http://Pcma.org)  
Professional Convention Management Assn.
- [PlanYourMeetings.com](http://PlanYourMeetings.com)  
Plan Your Meetings: online RFPs, resource directory, blogs, news, social networks, advice, tips and more ...
- [Facebook.com/Planyourmeetings](http://Facebook.com/Planyourmeetings)  
An online community of meeting professionals
- [Sgmp.org](http://Sgmp.org)  
Society of Government Meeting Planners
- [Siteglobal.com](http://Siteglobal.com)  
Society of Incentive & Travel Executives

# FOLLOW THESE 6 STEPS:

## 1. REPORT BACK

- Notify all who were involved in the site selection process (national sales offices, property-level sales manager, CVBs, etc.) that the bid was awarded.
- Send thank-you notes to everyone you met, and consider providing feedback to vendors you didn't select.

## 2. NEGOTIATE SITE CONTRACT

- Make sure the contract is easy to read and precise.
- Ask a meetings industry attorney to review it even if your company doesn't require it. At the least, check to see that indemnification language is included and is reciprocal. Make sure that each party is responsible for its own negligence.
- Make sure it includes concessions and upgrades besides the standard offering, such as complimentary meeting space, room upgrades, VIP amenities, complimentary welcome reception, free parking, health club passes, etc. Specify what is not allowable for direct billing, i.e., personal phone calls, alcoholic beverages, movies, room service, etc.
- Does it contain cancellation clauses, attrition fees, etc.?
- Strike out clauses that "double-dip."
- Protect your group from change of ownership or any other factor that might reduce the quality of service by inserting a clause that gives you the right to cancel if quality of service is jeopardized by specific conditions.
- Include a statement in the contract that all fees and charges have been disclosed, and that you are not liable for any other changes unless you agree to them in writing.
- Update your meetings résumé and double-check details before signing.
- Make sure your contract is countersigned and dated by all necessary parties.

## 3. CHOOSE VENDORS

- Ask the facility to recommend vendors, if they don't have on-site services or contracts.

- Check references and talk with people who have used the service provider.
- Meet with caterers and sample food.
- Meet with speakers and/or entertainers and review demo tapes/press releases/résumés. Is there a backup plan if there are last-minute cancellations due to illness, travel delays, etc.?
- Arrange for equipment needs.
- Arrange transportation.
- Inquire about policies on credit and payment of charges. Is there a discount for paying in advance or within a certain time frame?
- Ask about the cancellation/refund policy. Find out what measures are in place in case of equipment failures.
- If the event is outdoors or includes outdoor activities, what provisions are there in case of bad weather?
- Finalize written agreements and follow up with final details.
- Schedule extra help for the day(s) of the event. (CVBs or colleges may have volunteers.)

## 4. CREATE SPEC WORKSHEETS

Make separate worksheets for each function or meeting room, so they can be given to everyone responsible for the session or activity. They will facilitate communication and establish a chronology. Include:

- Billing costs and information
- Beverage/break/menu/catering details
- Equipment information
- Entertainment details
- Program location and title
- Setup details/diagram
- Staff responsibilities
- Type of function
- Contact information

## 5. INVITATIONS, SIGNS, AMENITIES, ETC.

- Develop your attendee list.
- Print and mail invitations, or save paper and email invitations, depending on the preference of your group.

- Include information on agendas about suggested attire, travel arrangements, directions and other instructions. (Consider including a list of other meeting attendees.)
- Track the number of RSVPs; follow up with those who did not RSVP to find out why they can't/won't come.
- If no reusable supplies from previous events are available, order signs and printed material, including nametags.
- Put together your welcome package; include evaluation forms. (Consider distributing digitally or via flash drives.)
- Arrange delivery of all meetings material with the event manager.
- Develop and distribute meeting agenda (include hotel and transportation information).
- Prepare a complete master set of all handouts and materials to carry with you in case digital files are corrupt or shipments get lost in the mail.
- Get estimates/proposals for gifts or favors. Make sure they reflect the meeting and respect the corporate brand/image.
- Place gift orders, wrap and distribute.
- Make arrangements for post-meeting disposal of items, whether they are to be donated, recycled or shipped.

## 6. PRE- AND POST-MEETINGS

Once the contracts are signed, you will probably be assigned to a Conference Services Manager (CSM) by the facility. Get to know the CSM very well; he or she can help with upgrades, perks and special requests. Schedule pre- and post-conferences with the CSM. Depending on your program, the average pre-conference is two to four weeks prior to your meeting (date of arrival). The post-conference will provide important feedback for you, the property and for future meetings. So be honest and don't forget to give praise where it's deserved.

### IN ADVANCE

- Check with the hotel at intervals to review the agreement, plans and to make sure things are on schedule.
- Submit group rooming list to hotel and

confirm arrangements three to four weeks out (including menus, room setups and special requests).

- Provide guaranteed attendance numbers for food and beverage events at least 72 hours in advance.
- Confirm speakers' A/V needs and travel arrangements and review per diems and reimbursement policies.
- Confirm logistical arrangements with other service providers.

### ON-SITE

- Hold pre-conference meeting to review details.
- Confirm arrival of shipped materials and distribute.
- Check hotel "reader boards" for posted times and locations of your functions.
- Check function room/banquet setups.
- Notify on-site contacts of any changes in plans or requirements.
- Monitor service delivery.
- Keep track of master account. Review and sign banquet checks daily.
- Make sure everyone knows what's acceptable. See that either signage, in-room screens or registration packets contain information about ground rules.

### AFTER THE MEETING

- Gather room pickup and other reports from facility.
- Prepare statistical reports on the meeting. Detailed reports should include attendee demographics, budgets and procedures as well as feedback. (These will provide a history for future events.)
- Process evaluation forms. Document your successes and share with meeting stakeholders. Surveys should include more than routine questions about food, entertainment and the facility; ask what attendees learned from the meeting that will change the way they do business. Evaluate overall satisfaction and demonstrate how well the event met its objectives.
- Provide feedback to the hotel; it builds a future relationship. Let them know what they did well, and how they could improve.

## 6 EXTRA TIPS

1. Room rates are the easiest item to negotiate. Knowing your attendees' habits and what they will spend on other services, such as golfing fees, gives you more leverage. Look for soft dates and off-peak savings.
2. Familiarize yourself with the destination and meeting locale. Get to know the local culture; find out what events are going on that you might tie into; tap into the CVB and any other resource.
3. Stay in touch with everyone. Make sure meeting objectives, systems and procedures are clearly spelled out and conveyed to staff and attendees. Keep suppliers, speakers and staff up to date on the status of the meeting no matter how busy you are.
4. Stay on schedule. Attendees want to know exactly what will be offered, when it will start, and how long they're expected to stay.
5. Be courteous to everyone and make sure your staff is trained to be, as well.
6. Check airlift into potential meeting destinations. If possible, confirm with local CVBs or air carriers that service will still be available over the dates of your meeting. If service is discontinued it can make formerly accessible destinations expensive to reach.



## PLAN YOUR F&B

- ❑ Get estimates and proposals
- ❑ Arrange tastings and take photos
- ❑ Choose caterer/restaurant
- ❑ Sign contract
- ❑ Pay deposit
- ❑ Choose format
- ❑ Finalize menus (include special needs)
- ❑ Finalize seating, décor, etc.
- ❑ Take final head count
- ❑ Arrange for tips and taxes
- ❑ Arrange transportation and parking

### NEGOTIATING GUIDELINES

- ❑ Don't forget to take a look at menu pricing before hotel contracts are signed. Beware of hidden charges — tax, gratuities, service charges, setup fee, decorations, carving person, labor, bartender, etc.
- ❑ Ask for references from groups that have held food functions at the facility within the last two months
- ❑ Find out how far in advance the property will confirm menu/reception prices.
- ❑ Watch F&B attrition in the contract negotiation stage: Tell them you will pay any attrition on their profit, not the entire plate and not on service charges if the attrition happens far enough out that food and labor haven't been ordered. If you think this is going to be a problem, ask the catering manager how far out they order the food. Also, go low on your numbers; it is always easier to add than delete, but be sure to keep your catering manager updated if your numbers are growing. Most vendors provide 5 percent to 10 percent above the agreed-upon guaranteed number.
- ❑ If you know you will exceed the minimum F&B spend required, you can use that as leverage in negotiations to gain concessions elsewhere.

- ❑ Find out when the site's program coordinator will arrive to oversee last-minute details. (This should be at least 30 minutes before the food function is scheduled.)
- ❑ The best way to handle F&B billing is have the property do a binder that has dividers by dates, according to your catering functions. Each morning they take the banquet check, attach it to the BEO from the previous day and place them into the binder under the day the event happened. Accounting then gives the binder to the meeting planner who is handling the billing on a daily basis to sign banquet checks. Once checks for that day are signed, give the binder back to accounting. This way any discrepancies can be discussed while the meeting planner is still on-site.
- ❑ Be aware of what is happening in general with food costs. If you frequent certain restaurants, become friends with the manager and occasionally ask what pricing on food is looking like. Same with liquor store owners.
- ❑ Keep an accurate history on your numbers. Go around and see how many people you actually have: Don't count empty seats; count folded napkins or unused silverware.
- ❑ For bar service, on consumption is cheaper than per person. Coffee breaks per piece are cheaper than per person. If you are doing power bars or granola bars for your coffee breaks, make sure they are on consumption, as very few people eat them.
- ❑ The biggest cost-cutting you'll do is in beverages, by not having an open bar and just serving beer and wine. Or have just one special drink in addition to beer and wine versus an open bar.

### DON'T FORGET

Food allergies and diet restrictions are an increasing concern among event attendees. Make sure this information is gathered during registration and that allowances are made. Don't forget to make sure the banquet staff understands the importance of attending to and serving these needs.

### RENT IT

Need a candelabra or brandy snifters? Coat hangers or cutlery? Fountains or furniture? You can rent them all. In fact, when it comes to renting items by the hour, the possibilities are endless. Think "different." Need to set the stage? Consider prop houses that work with theaters or within the film industry. Think about renting plants from a nursery, or paintings or sculptures from an art gallery. Visit antiques stores, specialty lighting facilities or furniture stores for ideas. For trouble-free rentals, make sure to have the time and people needed to make it work. Visit the rental company and do a spot check for chips, stains, cigarette burns, etc. Finally, check the cost of renting against the cost of buying. In some cases, it may actually be more cost-efficient to purchase the item.

- ❑ Is there a charge for a bartender/cashier? In a cash bar reception, find out if there is a minimum sales amount required to waive the cost. (Be sure that you comply with the company's policy on alcohol.)
- ❑ Add curb value to your meal by having the chef put herbs in sauces, food, vodka, etc. It seems more elegant and won't raise your cost.
- ❑ Discuss how they dress their buffets. Many companies are getting away from fluff cloths and, as a result, the buffets can look flat and boring. If this isn't acceptable, ask for more layering and texture. If you have a couple of pennies to spend, buy some potted plants — they will last your entire stay.
- ❑ Make sure properties charge based on actual, not estimated consumption.
- ❑ If you have a very tight budget, it's best to tell the chef how much you can spend per person and let him or her design a custom menu for your group.

### FRESH IDEAS

- ❑ Put meal coupons in the attendees' registration package for those requesting special meals. Have the banquet server set a cocktail round with the box of special meals behind them; people can come up to this station to redeem their coupon.
- ❑ For breakfast, think along the lines of a European continental breakfast: assorted nuts, trail mix, cheese display with crackers, and an antipasto platter of meats, sausages and vegetables.
- ❑ For coffee breaks have the facility put the replenishments for cream, sugar, cups, etc., under the coffee break table. Put creamer and sugar in big bowls to cut down on replenishment.
- ❑ Make sure snacks or treats are fresh. Have healthy alternatives; keep them simple but fun — baskets of popcorn, plates of cookies, yogurt with fresh fruit and granola, everything chocolate or a local specialty, like Moon Pies.

- ❑ Use decorative buckets to hold different types of snacks — trail mix, dried fruit, miniature pretzels, chocolate-covered raisins, etc. Put out wax bags or little white bags with a sponsor's sticker and let people make their own baggie.
- ❑ Consider an afternoon tea. Offer a selection of green teas with finger sandwiches or mini-desserts.
- ❑ Don't pay much attention to what is "in." Instead, pay attention to the foods your group enjoys and try to put twists on them, i.e., instead of chocolate chip, oatmeal and peanut butter cookies, do toffee chip, M&M and Reese's Pieces cookies. Or provide healthy alternatives like fruit and nuts.
- ❑ Be more conscious of the food that is coming back. Get up and walk around the room during your events and see what people aren't eating. Ask the banquet captain to keep track of what comes back untouched (tip extra for his or her help).
- ❑ Always make sure buffets are double-sided, even for smaller groups.
- ❑ Make the menu a keepsake. Do something different with your printed menu; put relevant quotes above the item being served, and then print the menu on a nice paper from a paper store. Or, if you're interested in being green, print the menu on a sheet embedded with wildflower seeds that can be planted, or project the menu on a wall.
- ❑ Personalize the meal — have the company logo or name stenciled in chocolate or powdered sugar on the desserts; ask the bartender to create a signature cocktail.
- ❑ Use props on the tables to tie in to your theme.
- ❑ Chef demonstrations, wine-tasting dinners, create-your-own stations, and other interactive, educational opportunities enhance events and make for memorable experiences.
- ❑ Lazy Susans or salads that need to be assembled at the table are a fun way to get people talking to others at banquets.

### 5 EXTRA TIPS

1. Cutlery: Rental cutlery goes far beyond plastic and stainless steel. Your borrowed finery can include fish forks, butter knives or demitasse spoons in gold plate or pure sterling.
2. Dishes: Options range from exquisite table settings to Fiesta-ware for barbecue grub. Beyond the basics, you can choose from gold- or silver-rimmed plates, bone china soup bowls, demitasse cups, dessert plates and so on. Mixed shapes and patterns add to the table's interest.
3. Glassware: Rent glasses in every shape and size. Try different colors.
4. Linens: Rent tablecloths, table runners and napkins in every imaginable hue and layer them. Order dark napkins and lint-free tablecloths; lint from white tablecloths and napkins leave a mess behind on dark suits. Organize buffet tables into color groups to match a corporate or program theme.
5. Tables and chairs: Tables come in half-moon, serpentine, high-top and more. Or rent bar tables, registration tables and banquet tables complete with covers of every description. Ordinary banquet chairs can be covered with fabulous fabric for greater impact tied with bows, or hang with silk vines and flowers.



## PAY ATTENTION TO ROOM SETUPS

Dynamic meetings, effective interaction and successful learning depend on the setup of the room. Pay close attention to details and don't just accept the schematic the facility provides. Make setup decisions based on your needs.

### 7 EXTRA STEPS

1. Make sure you take the overview tour of meeting room locations. Are the rooms easy to find? How much signage is needed?
2. Attendees should be able to leave the room without disturbing anyone else.
3. If extensive writing is to be done or if the meeting will run more than two hours, seat attendees at tables, preferably without a cloth.
4. If chairs are not as comfortable as they could be, ask your speaker to consider giving participants a stretch break.
5. Provide plenty of ice water, drinking glasses, notepads, pencils, mints, etc.
6. It's important that during sessions, attendees can see each other; it helps them connect with each other and the presenter.
7. People learn and feel better in comfortable, attractive surroundings; keep that in mind.

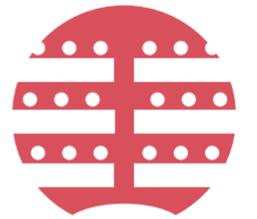
- ❑ **Comfort zone:** Make sure the room is neither too hot nor too cold. Are there any unpleasant odors? Be aware of cleaning solutions, food odors or any other less-than-pleasant scents in the room.
- ❑ **Doors and walls:** Your group should face the longest wall in the room. This way, the maximum number of people face the presenters.
- ❑ **Front and center:** Typically the back of the room fills far quicker, to the speaker's disadvantage. Place rope and stanchions across the back rows, forcing people to the front. Or put the speaker in the center, "in the round."
- ❑ **General appearances:** Check to see if there are any panels on the ceiling that show signs of dirt or water damage; that the windows are clean; that chairs and tables don't wobble or show signs of wear. Ask when the last time air filters were changed.
- ❑ **Lighting:** Make sure all the lights are functioning properly and set the way you prefer. Consider pink lighting for the speaker, which is the most flattering.
- ❑ **Size:** Make sure the room is not too large or too small for the group. If participants arrive and see a room that is relatively empty, they may think the meeting is not very important. A room that is too large is as negative as a room that is too crowded — both may give an impression of lack of respect for the meeting and speaker.

Have you left space for staging, audio/visual equipment, pillars or head tables? Is there space for refreshment breaks? How do you know if a potential space is adequate to your needs? The best way to be certain your group will fit easily into a space is to create a diagram to scale. (Room diagramming software is available.) Another advantage to using a diagram is that it can simply be handed to the people in charge of setting up the room for your meeting.

- ❑ **Sound:** Make sure the sound system is in excellent working condition and that there is someone who knows how to work it. Do a sound check before the meeting starts, and have an additional microphone on hand in case of technical difficulties. Also, consider neighboring room noises and hotel maintenance schedules. You don't want someone starting a vacuum cleaner or lawn mower outside your room during the presentation or meeting.
- ❑ **Table shapes:** Square or rectangular tables create a sense of getting down to business and are often preferred for training sessions and instructional meetings. Round tables encourage a sense of cooperation and sharing, and are also a good shape for creative ideas and brainstorming sessions.
- ❑ **Visibility:** Make sure presentations, overheads and handouts use a typeface that all participants can easily see. Make it easy for every person to see and hear the other individuals.

## SEATING PLANS

The following are common seating arrangements. Whichever arrangement you choose should be comfortable and promote open discussion. There are nine distinct choices, each best suited to a specific set of circumstances. For more out-of-the-box ideas visit [thrival.com](http://thrival.com).



### 1. CLASSROOM SEATING

Reminiscent of a schoolroom, this is basically rows of tables with chairs. It's preferred when attendees need table area to take notes, spread out materials or do other activities. One of the most efficient uses of space, classroom tables come in two widths: The standard table is 30 inches wide; there also is an 18-inch version known in the trade as a "skinny." Tables are either 6 or 8 feet long. Place two participants at the 6-foot table and 3 at the longer version. Specify in your contract the number of participants you want per table; otherwise the facility may overcrowd each table to fit more people into a smaller room.

### 2. THEATER SEATING

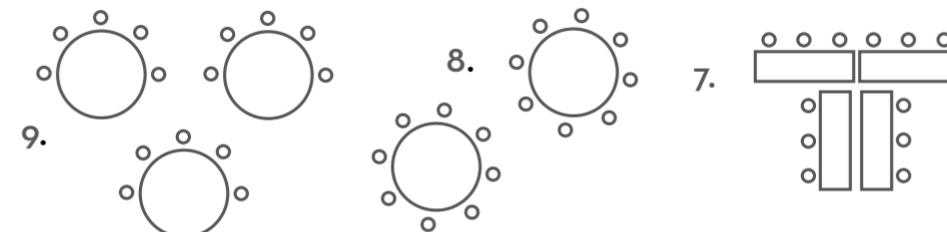
Theater seating maximizes space, but it is far less convenient for note-taking or group interaction.

### 3. CHEVRON SEATING

In this setup, chairs are angled toward the front of the room in a V-shape. Chevron seating has a friendlier feel.

### 4. CONFERENCE SEATING

Used for meetings with 30 participants or less, all chairs gather around one large table.



### 5. U-SHAPE SEATING

Also used for small meetings, standard banquet tables measuring 8 feet long and 30 feet wide are placed end-to-end to form a large U shape. Participants face each other, but there is space between the tables that can be used as a presentation area.

### 6. HOLLOW SQUARE SEATING

Standard banquet tables are placed end-to-end forming a giant rectangle or square that is hollow in the middle. It's generally used for groups of 30 or fewer.

### 7. T-SHAPE SEATING

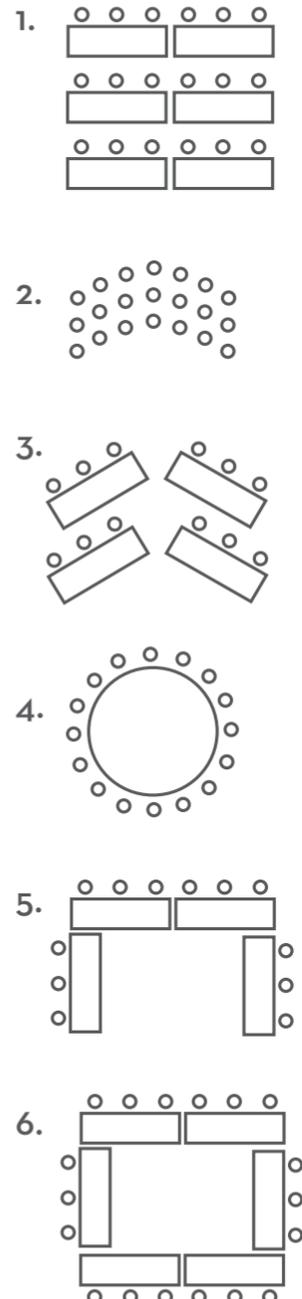
Another small group setup, banquet tables are arranged to form a large T, giving a sense of having a head table where presenters might be seated.

### 8. BANQUET SEATING

The standard banquet table is 60 or 72 inches in diameter, seats eight or 12 people, and is nearly always used at food functions.

### 9. CRESCENT SEATING

Similar to banquet seating, but the chairs are placed around one-half or three-quarters of the table. Chairs all face the front of the room.





## SPEAKERS ONLINE

- [TheSpeakersGroup.com](http://thespeakersgroup.com)  
Celebrity speakers and experts. Search by price range.
- [Brooksinternational.com](http://Brooksinternational.com)  
Celebrities, famous athletes, motivational speakers and entertainers
- [Nsaspeaker.org](http://Nsaspeaker.org)  
National Speakers Association
- [Premierespeakers.com](http://Premierespeakers.com)  
International resource for prominent speakers
- [Speakers.com](http://Speakers.com)  
Authors, impersonators, actors, celebrities and special interest speakers
- [Speaking.com](http://Speaking.com)  
Keynote speakers

## HIRING SPEAKERS & ENTERTAINMENT

- ❑ Do you want them to educate, entertain or persuade? Make sure they can help you accomplish the meeting's goals.
- ❑ Before hiring a speaker or entertainer, meet with them in person, watch a performance or ask for a demo tape.
- ❑ Discuss what the specific presentation or entertainment program will be for your event. You don't want to be surprised.
- ❑ Try to negotiate a flat fee. See if the speaker is willing to include travel, hotel or other costs in the fee.
- ❑ Check contingency plans for illness, bad weather, power outages, etc.
- ❑ Make sure the venue can accommodate your choice. (A two-piece act in a large convention room will get lost.)
- ❑ Arrange for something to fill in when the band takes a break.
- ❑ Make sure you have covered all equipment needs (lectern, microphone preference, overhead projector, LCD panel, video equipment). Check computer compatibility. Be thorough about the technical requirements and make sure you know what is allowed and whether the room can accommodate the equipment, such as large screens.
- ❑ Check access to freight elevators and be sure to leave time for setup and breakdown.
- ❑ Be sure to meet with the on-site technician and make sure you can contact her or him in an emergency.
- ❑ Check all mics and sound levels well before it's time for the speaker.
- ❑ Make sure the speaker or room monitor knows where the light switches are, how they work and who will dim them on cue.
- ❑ Check sightlines to the stage or podium. Never place the speaker in front of a window, shiny surface or busy background where glare or distracting elements will compete and diminish attention to the message.
- ❑ Fresh or silk flower arrangements or plants near the podium create a feeling of comfort. (Be sure to ask the speaker about allergies.)
- ❑ Will speaker provide handout material or need copies made? Be green: Encourage attendees to go to websites for handouts or distribute them digitally on USB drives.
- ❑ Make sure the speaker knows how much time is allotted for his or her presentation and how much time should be left for Q&As.
- ❑ Is there a rehearsal schedule? Is there a speaker's room (green room) where he or she can wait or do last-minute preparations?
- ❑ Have water available at the podium.
- ❑ Let speakers and other guests know what meetings or events they are invited to attend. Are they invited to the awards dinner?
- ❑ Are they willing to offer other services: MCing, working the floor, handling an information booth, etc.?
- ❑ If staff members are doing presentations and need to improve their speaking skills, consider hiring a theater professional to work with them on stage presence, body language, vocal work and delivery. Corporate divisions of theater and improv companies have a variety of programs that can enhance employee training and development, and are often staffed by actors with corporate backgrounds.
- ❑ If you are planning a team-building activity, make sure it suits your group's demographics. It's important that whatever you plan, it's fun as well as challenging and won't leave anyone out in the cold.
- ❑ Want a speaker to be a virtual emcee or presenter? Look for someone with broadcast experience.

## TECHNOLOGY KNOW-HOW

### MANAGE YOUR MEETING

- ❑ Get organized with the basics: a word processor, a spreadsheet and a database.
- ❑ If you need guidance, download free Excel spreadsheet templates for everything from conference matrix grids to attrition calculators from [corbinball.com/tipstools](http://corbinball.com/tipstools).
- ❑ If you want everything spelled out for you, meeting management software packages, such as APEX Powershop, can include everything from RFPs to housing lists, nametags and budgets.
- ❑ Organize press releases, email invitations and marketing metrics with an online system such as Certain Meetings or Constant Contact.
- ❑ Invite local press or industry bloggers to attend and cover your event.

### GET CONNECTED

- ❑ Make sure you know how attendees can get connected to the Internet on-site, and at what cost.
- ❑ Use a video-conferencing facility, G+ hangouts or a virtual network like Second Life to facilitate training sessions and conferences between attendees in far-flung destinations, or to introduce a special speaker to the group.
- ❑ Need broadcast-quality resolution? Go for HD cameras/projectors, satellite feeds or Internet 2 access. Live satellite broadcasts also are available for conferences held in movie theaters. Check [ncm.com](http://ncm.com) for more information.
- ❑ On a tight budget? Webcam-equipped laptops create instant conferences over the Internet using free software like Skype.com, Google hangouts and ooVoo.com.
- ❑ The World Clock Meeting Planner ([timeanddate.com/worldclock/meeting.html](http://timeanddate.com/worldclock/meeting.html)) calculates the best conference times for attendees in up to four time zones.
- ❑ Leverage technology such as Twitter, Facebook, LinkedIn, Eventbrite,

Slideshare, Tumblr, YouTube, Lanyrd and Google+ to help you network, connect attendees and market your event.

### MAKE IT SNAPPY

- ❑ Encourage presenters to include YouTube videos and music in PowerPoint/Keynote/Prezi presentations.
- ❑ Spice up a boring presentation with a little humor. Some improv theaters have corporate entertainment/video departments or can team-build.
- ❑ Moderate Twitter streams for real-time conversations/feedback using an event specific hashtag (e.g. #yaypym), and provide a blogging station during general sessions.

### SET THE STAGE

- ❑ Choose a room with adjustable lighting. Keep the room light enough to take notes.
- ❑ Data/digital projectors can be hooked up to laptops, DVD players or mobile devices.
- ❑ Using closed-circuit video in large rooms allows you to scatter satellite screens throughout the audience to improve everyone's access to the information presented.
- ❑ Copy boards let presenters record notes and print them out for attendees.
- ❑ Interactive whiteboards are connected to a computer and projector, allowing presenters to interact with the audience and access computer-based information at the same time.
- ❑ Plasma display panels (PDP) or flat-panel television screens can be used in lieu of a traditional screen. PDP overlays turn plasma panels into interactive whiteboards.
- ❑ Multiple panels can double as video-enhanced scenery, projecting one or many background images.
- ❑ Water screens provide a high-resolution projection surface that "floats."
- ❑ You don't need a screen to project images.

*Continued on next page*



## 8 EXTRA TIPS

1. Research areas you're unfamiliar with at [planyourmeetings.com/](http://planyourmeetings.com/) destinations or on our business directory.
2. Find out whether airfare rates are likely to rise or fall, and see what the current lowest fares are at [bing.com/travel](http://bing.com/travel).
3. Make sure software is compatible with your computer's operating system. Also, only load software on the computer you will be doing the most work on; software locks may prevent it from running on more than one machine.
4. Create a closed-circuit video connection between the main space and any spillover group so everyone can see what's going on.
5. Use the free TechSpec app to rate a venue or hotel's technical infrastructure and compare potential meeting sites.
6. Need backup Internet? 4G/LTE aircards may be rented by the day from [daypasswireless.com](http://daypasswireless.com).
7. A mobile device's hotspot may be used in lieu of wired Internet if yours goes out. But tether the device to a laptop via a USB cable to ensure the best connection.
8. 4G/LTE cell connections are faster than most Wi-Fi connections.

Continued

The surface of a pool, the walls of a room, a wall of water — anything that is flat will add texture and a touch of the unexpected to projected displays.

- ❑ Consider creating projected 3-D images to interact with speakers or audience.
- ❑ Self-contained, roll-up venues are available for outdoor events.
- ❑ Check the presentation sightlines from everywhere in the room.
- ❑ Encourage speakers to interact with the audience by providing clip-on lavaliers, handheld wireless or headset microphones.
- ❑ Use colors and light to transform the mood of a room and brand the space. Laser lighting can create rock-show effects, spell out company logos or slogans and reinforce the rhythm and mood of piped-in music. Gobo gels in fixed lights can project logos and color washes. Special gobo gels can simulate textures, as well.

## BE PREPARED

- ❑ Walkie-talkies are your best friends. All important contacts should have one on the big day. Don't rely on cell phones (although the Voxer walkie-talkie app is cool).
- ❑ Make sure the venue provides you with at least one tech-savvy A/V person who will be on-call and within arm's reach throughout the event.
- ❑ Have extra batteries for microphones, dongles for projectors and charger plugs for laptops in the presentation room.
- ❑ Make sure projection equipment is compatible with the disc or laptop the presenter is bringing in advance. Just in case, have a backup plan.
- ❑ Use text messages, social networks, conference apps and emails to broadcast emergency information or schedule changes, as needed.

handle group transportation needs. Do they have examples of what similar size groups have done in the past? Do they have suggestions for unusual forms of transportation?

- ❑ Contact local transportation companies the CVB recommends.
- ❑ Does the city have a public transportation system that would be useful? Are group fares or charters available?
- ❑ What are taxicab fares, and can prepaid vouchers be purchased for attendees in advance?
- ❑ Consider hiring a destination management company to arrange transportation and drivers, print brochures and maps for attendees, and set up signs and loading areas.
- ❑ What's the transportation schedule? A continuous loop? Morning and afternoon only? On demand?
- ❑ Who's providing signage for each vehicle?
- ❑ Arrange America Disabilities Act (ADA)-equipped vehicles, if needed.
- ❑ If venues are within walking distance, give attendees maps.

- ❑ Consider hiring a speaker or storyteller to amuse attendees if they will be on the bus for more than 20 minutes.
- ❑ If attendees will have bags with them, make sure shuttles have ample storage space.
- ❑ Keep informed about local construction schedules and traffic patterns; use that information to avoid both while in town.

## PREPARE THEM

- ❑ Keep attendees informed about what they should expect before they arrive.
- ❑ What's the weather like? What activities are planned? Will they need sensible shoes? What should they pack?
- ❑ What's the airport layout? Where should they go after they land, and who will be there to meet them? What should they do if their plane is late?
- ❑ Greet attendees at the airport with a bottle of water and with welcome packets; they can relax, rehydrate and reorient themselves to the new task at hand before arriving at the hotel.
- ❑ Provide diagrams of the meeting venue and transportation hubs, so no one wastes time getting lost.
- ❑ Don't ever assume attendees know where they're supposed to be.
- ❑ Be productive in informing attendees about potential crises like hurricanes or flu outbreaks so they know what contingency plans are in place.

## 7 SAFETY TIPS

1. Gather a list of emergency contact numbers from the local CVB and notify authorities when your group will be in town.
2. Meet with hotel and facility security professionals and go over emergency procedures, particularly exit and crowd management strategies. Know city plans, too.
3. Go over internal communication plans; know who is doing what and make sure everyone is on the same page and is connected during the event.
5. Make sure properties and facilities are aware of who your vendors are, what they are delivering and when they are expected.
6. Know what's going on in the world. Designate someone who can deal with questions and concerns attendees may have. Have alternative travel plans just in case.
7. Spell out specifically who is responsible for what in vendor contracts. Vendors' insurance should state liability limits; see if your group can be named as additional insured. Consider getting an event cancellation policy.



# GETTING THERE AND BACK

## BY AIR

- ❑ Who's in charge of booking flights? An in-house department? An outside travel agency? Coordinate flight arrivals to simplify ground transportation arrangements (and lower costs).
- ❑ Select an official airline. Some airlines have group sales departments offering discounted fares, ticketing services and convenient billing policies.
- ❑ Airfares tend to be lower if you're flying into a major hub where an airline is based.
- ❑ Best fares are traditionally found 90 days out. Bing.com/travel predicts whether fares will rise or drop, and lists what the current lowest fare is on any given day.
- ❑ Encourage attendees to use your official air carrier. Use that as leverage to get complimentary tickets, based on number of seats booked, to use for future flights for staff or VIPs.

- ❑ Ask airlines for additional frequent flyer points for your group and for an additional discount for those booking flights 60 days or more in advance.
- ❑ Negotiate for the use of the carrier's VIP lounge for an attendee meet-and-greet.
- ❑ Note fees for checked luggage.

## GROUND TRANSPORTATION

- ❑ Check with hotels and facilities; many have free, dedicated airport shuttles or can provide airport pickups for a minimal fee.
- ❑ Arrange limousine (Hummer, town car) transfers for VIPs.
- ❑ Do you need to ask for concessions on staging areas and curb space at the airport or venue?
- ❑ Are police needed for extra security? If so, who will pay for them?
- ❑ Get advice from the local convention and visitors bureau (CVB) about how to

## BE PREPARED

- ❑ Make sure the vendor carries adequate insurance that states liability limits.
- ❑ Ask for recent references.
- ❑ Make sure vendors' contracts spell out who is responsible for what.
- ❑ Have passenger lists to check so no one gets left behind.
- ❑ Keep shuttle vans stocked with water and light snacks, especially if attendees will be getting on and off more than once a day.

Jackie Thornton, M.S., CMP, contributed the seating chart to this guide. President of Global Marketing and PR Inc., Jackie also teaches event planning certificate courses.

Claire Gould, owner of Rx for Events LLC, contributed to the F&B section. Claire shares her F&B tips and experiences monthly at [PlanYourMeetings.com](http://PlanYourMeetings.com).

Plan Your Meetings Chief Storyteller Kristi Casey Sanders updated and edited this guide.

For more best practices, planning trends, tips, ideas, examples, industry news and more claim your free subscription to PYM at [PlanYourMeetings.com/subscribe](http://PlanYourMeetings.com/subscribe).