

AUDIO CONFERENCE

Plan Flawless Meetings and Events

PRESENTED BY

**The Office
Professional**

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First Time Planning Or...



Are You an Old Hat At It?



No Matter 1st or 1001st

Basic Steps For Planning Meetings and Events

Basic Questions

- **Why are you having this meeting?**
- **Is it the same every year?**
- **Can you be creative and change it?**
- **Who will be attending?**
- **Why are they coming?**
- **Do you have any money or do you have to do it free or beg for decorations, venues and food?**

Question # 1

Why are you having this meeting?

Why This Meeting/Event

- You have to
- It's in your by-laws
- It's a money maker
- We have always just had it
- So, how can we spruce it up a little?

The Dreaded Annual Meeting

- According to your by-laws you must have it, but it doesn't say it has to be monotonous year after year
- New twists
 - What have you done this year you can showcase (decades, date of meeting, history)
 - What is new in the way of “gimmicks” that you can “borrow” to enhance your meeting
 - How can you introduce your CEO or speaker?

New Ideas

- Do you think of ideas and keep getting shot down?
- Sell it hard and have back-up
- Trust and dependability
- Know what the boss, chair person or CEO likes and build off that
- My best event and how hard it was to sell



Question # 2

Who will come?



Who Will Come?

- Sometime you don't have a choice
- Members, boards, staff
- Another reason why it needs change and needs excitement every year or meeting
- Keep them guessing. Element of surprise. Can't wait to come back next year.
- Give aways – again a big surprise!

Question # 3

Why are they coming?



Why Are They Coming?

- **They have to!**
- **The destination is wonderful**
- **Need it to complete an educational requirement (Continuing Educational Units)**
- **Or...your meeting last year was so spectacular that can't wait!**

Question # 4

Do you have any money in your budget to support this meeting/event?



Budget

- You have so much money the sky is the limit...or
- Absolutely no money and need to be creative
- Partnerships and sponsorships
- Bargain, trade, exchange, swap
- Talk to similar companies, cities, businesses like yours and see what they do or have done

Checklist

A-Z

Check and recheck

No Matter the Size or Type You Need to be Prepared

- **Checklists**
- **Smaller Event**
 - One checklist and timeline
- **Larger and more detailed events**
 - Numerous checklists and timelines

The Process

The Flow of Meeting Or Event

General Process

- Budget
- Time and date
- Hotel
- Venues
- Speakers
- Entertainment
- Invitations/Decorations
- Staffing
- Transportation



Hotels



- **One hotel or multiple**
- **Site visits and pre-convention meeting**
- **Rooming lists daily**
- **Pre-keyed for clients/customers/guests**
- **Check-in and check-out times**
- **Transportation (pick up/drop off points)**
- **Meeting area for guests**
- **Sponsorship**
- **Ceiling heights for decorations**

Hotels

- Rooms for staff/meetings
- Suites for VIPS
- Hospitality Suites
- Transportation to/from hotel
- Welcome packets in rooms
- Amenities nightly...or not
- Daily activities
- Spouse programs



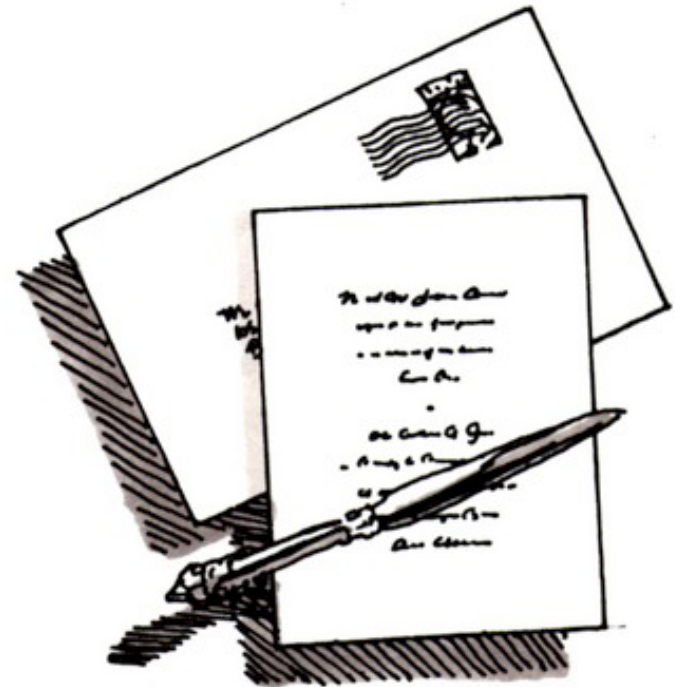
Meeting Rooms

- Sufficient number and size
- Audio visual needs per room/speakers
- Air conditioning/heat
- Tablets and pens
- Water and glasses



Invitations

- Dates and times
- Mark your calendar, Save the Date
- Invitations (hard copy or via e-mail)
- Mailing lists
 - Complimentary, pays
 - City officials, VIPs
- RSVPs
- Follow-up



Food and Beverage

- Receptions
 - Hors d'oeuvres
 - Passed food
 - Buffet and display areas
 - Percentage seated
 - # and size of tables
- Bars and bartenders
 - Beer and wine, full bar, premium, house
 - Coupons, open bar, cash bar
- Service staff (style, #, dress)
- Food for entertainers, volunteers, security



Hotels

- **Plated Events**
 - # of tables and size (room layout)
 - # at each table
 - Staging
 - Screens, audio visual
 - Special meals
 - Timeline of event



Table, Chairs, Linens

- Colors, style of linens (paper, plastic, cloth?)
- Size of tables versus linens
- Chairs and chair covers
- Napkins
- China, crystal, paper or plastic
- Silverware, serving utensils



Transportation

- Air and ground
 - Airline manifests
 - Taxi cabs available
 - Shuttles
- Food, drink, entertainment
- Meet and greet at airport, hotel
- Guides
- Signage



Audio Visual

- AV company or in-house services
- Lighting
- Technicians
- Screens
- Microphones/speakers
- Projectors
- Laptops



Speakers

- **Contracts**
- **Budget**
- **Presentation**
- **Audio Visual needs**
- **Green room**
- **Housing, transportation, food**
- **Security**
- **Products to sell**



Staffing

Smooth Running Show

- Completely understand their responsibility
- Can handle anything if you are not there
- All singing from the same choir book
- Understand the flow, purpose, goals and end result



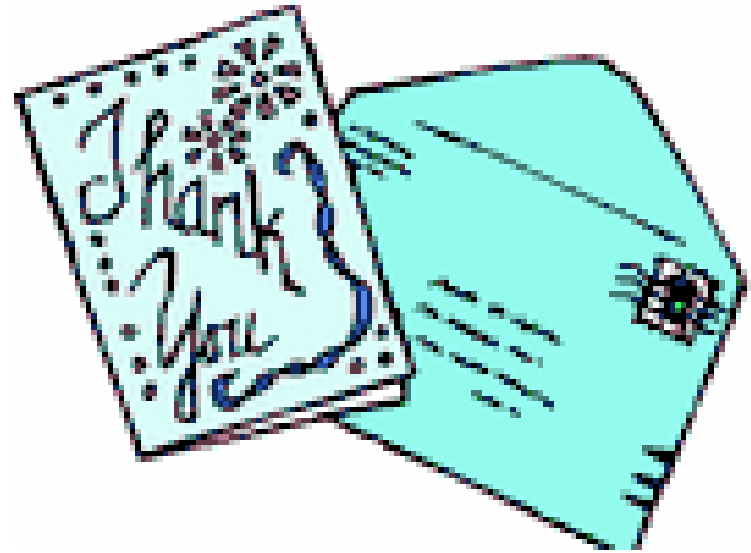
Entertainment

- Transportation
- Fees
- Contracts
- Staging
- Green room



Additional Needs

- Decorations
- Badges
- Signage
- Amenities
- Thank you notes
- Photographer/Videographer



Those Extras

- Paramedics
- Security
- Police
- Permits
- Media
- Contingency planning



Additional Checklist Needs

- Radios/communication
- Rentals (tents, fans, heaters)
- Clothing
 - Volunteers
 - Staff
- Back-up plan



Suggested Chart

<u>Person</u>	<u>Item</u>	<u>Completion Date</u>	<u>F-up</u>
Suzie	Gifts	Tuesday, July 1	Completed

- Be specific on items, date of completion and if any follow-up needed
- Additional column for “notes”
- All involved need to be up-to-date on all details

Additional Checklists

- Entertainment Checklist
- Transportation Checklist
- Food and Beverage Checklist
- Audio Visual Checklist
- But...don't go crazy with checklists



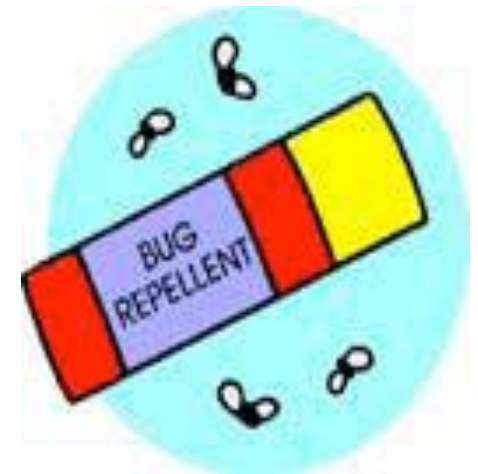
Other Items to Consider

- **Dance floor**
- **Coat check**
- **Translators/signers**
- **Insurance**
- **Certificate of insurance**
- **Ramps, ADA, Wheelchair
Accessibility**



On-Site

- **Mini Office**
 - Paper, pens, tablets, tape
 - Camera
 - Additional timelines and checklists
 - Additional “uniform” items
 - Tape measure
 - Water, food, grab and go items
 - Computer, printer, paper



Parking

- Inexpensive and convenient
- Reimbursed parking coupons
- Self parking and valet
- Well lighted
- Buses, trucks
- Loading docks
- Parking for staff
- VIP parking



Themes and Dreams

- Do you really need a theme? Or just a partial one?
- Dream your meeting/event first
- If you can't see it in your mind no one can
- Dream every single step
- Then make it come true



The Dream

- **In your mind walk through the speaker going to the stage (and then tripping over a wire – so now you need to make sure they tape that wire down)**
- **In your mind walk through the fireworks display (then you see a glitch and the curtain on the stage catching on fire – so now you need to move that one display and check with the fire marshal)**

The Dream

- In your mind walk through the closing buffet (and now you see 500 people rushing into the room all at the same time and only two buffet lines – so now you add at least three more lines and know the ratio of 100/buffet line)
- In your mind you walk through the outdoor luncheon (and it is pouring down rain and your tent just blew away – so you make sure you have a back-up inside and ample time to make the change)

The Real Dream

- You planned
- You walked through every step
- Everyone was informed and prepared
- Your idea was passed by the boss, CEO
- Everyone is on board
- You are ready to go
- Your dream comes true
- You even win an award for the “Meeting/Event of the Year”



Your Role

**What really is
your responsibility?**



Your Role

- **Do you completely understand your role?**
- **If not, find out and find out early**
- **Can you delegate or is it only you?**
- **Everything in writing**
- **Run Through/Dress rehearsals**
- **Pre- and Post-meetings**
- **Don't forget about your family**



Pre- and Post-Meetings

Who needs to be there?

Pre- and Post-Meetings

- **Hotel**
- **Venues**
- **Transportation**
- **Audio visual company**
- **Staff**
- **Volunteers**
- **Be prepared with agendas**
- **Act like a leader**



“Meeting/Event Time”

Show Time

Show Time

- Registration/check-in
- More than enough staff to handle
 - Complete understanding of assignments
 - Empower to take control (not too much)
- Tables or booths for registration
- Pens and any supplies needed
- Smiling



Show Time

- Signage (lots and visible)
- Uniform look
- Refreshments at registration
- Even entertainment or piped in music



Back-Up

What if???

Back-Up

- Rain, snow, sleet and hail can't keep them from attending
- Illness, death
- Road delays
- Transportation delays (air)
- No shows, or 100 extra show up

It's Over



**What can you do even better to
make them want to come back
the next year?**

The Finale

- **Post meetings/recap**
- **Evaluations (pay attention)**
- **Follow-up to any requests, demands**
- **Handling contracts, payments within agreed upon time limit (30-60-90 days)**
- **Thank-you notes**
- **Staff appreciation**

References

- **“ Art of the Event – Complete Guide to Designing and Decorating Special Events.” James C. Monroe, CMP, CSEP, John Wiley & Sons, Inc.**
- **“Meetings and Conventions: A Planning Guide” Second Edition. Meeting Professionals International.**

References

- **“The International Dictionary of Event Management” Second Edition. Dr. Joe Goldblatt, CSEP and Kathleen S. Nelson, CSEP. John Wiley & Sons, Inc.**
- **“Special Events – Best Practices in Modern Event Management” Second Edition. Dr. Joe Jeff Goldblatt, CSEP. Van Nostrand Reinhold.**