



By Clair Urbain

# Be Your OWN BOSS

Independent planners share the challenges and rewards of striking out on their own.

## SO ... YOU WANT TO BE AN INDEPENDENT EVENT AND MEETING PLANNER?

Ask any independent event and meeting planner what they like best about their business, and hands down, it will be the flexibility it offers. What's the worst part? Hands down again, it's being responsible for all facets of a business, some of which are easy, while others are much more difficult.

While attention to detail and the enjoyment of making clients happy are prerequisite event planning skills, things like marketing, self-promotion, accounting, billing and human resources are just as key in a successful independent event planning business.

Jenifer Remsik, owner of Sapling Events, specializes in planning events for domain experts who are looking for ways to build connections and clientele. She received her MBA while living in Florida, but quickly realized she was overeducated for the local market, and that the job prospects didn't meet her expectations in terms of challenge and pay.

This made the move back to the Madison area easy, especially while the planning of her first conference, Madison + Ruby, was underway.

Using her husband's connections and ability to identify information gaps in the computer programming field, they have been able to develop three ongoing meetings for distinct user groups.

"The key is finding a domain expert and working with them on the details. They know the information need and who can fill it, but likely don't have the skills or the time to successfully plan a seminar or event," Remsik says.

Susan Kainz, owner of Brookfield-based Meeting Matters, LLC, and Remsik agree that successful meeting and event planners must have experience in or be able to address three key areas: Deep network of professionals, a business infrastructure and experience in meeting or event planning.

Kainz had logged several years in the hospitality industry, then connected with ConferenceDirect, a national syndicated meeting planning group that helped her fill the gaps she needed to become an independent businessperson. "They provided some of the infrastructure I needed to get started. I already had the connections with companies, and ConferenceDirect helped me with marketing, sales and accounting," she says. However, in 2013, she decided to become a fully independent meeting planner and parted amicably with the organization.

#### BUILD YOUR NETWORK

Perhaps the greatest obstacle to a successful meeting planning business is building a network of clients, and as important, a network of service providers – hotels, talent agencies, speaker bureaus, expo companies, audio-visual providers, and even other event planners.

"While I had a clientele, ConferenceDirect helped me bring even more value to the clients through their national connections," says Kainz.

For Remsik, it was working with her domain expert and his connections to build their first of three conferences. One networking resource she recommends is the city's convention and visitor bureau. "They have already done much of the research identifying who and what is available in the area. It's a valuable resource that many planners overlook."

Your network should also include business experts who can help you navigate the subtleties of running a small, private business.

"You don't have the accountants, human resource people and IT folks that you'd find in a larger company," Remsik says. "You've got to be aware of the tax and employment rules in your area. I found out they were different in Wisconsin than they were in



SUSAN KAINZ, OWNER OF  
MEETING MATTERS, LLC  
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Building your network is one of several steps toward a successful meeting and event planning practice.

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Florida. I learned about the difference between a contractor and an employee the hard way, and luckily the Department of Revenue was understanding and helped me get on the right track."

"Personally, my certified public accountant (CPA) is my best ally," says Kainz. "CPAs know everyone in town and can often help you find those experts you need in your

business. That's how I found my printer and other services I needed," she says.

#### BUILD YOUR INFRASTRUCTURE

Kainz says the ConferenceDirect connection was instrumental in launching her business. At a minimum, you need a federal identification number and a W-9 for most hotels and conference centers. However, some of them will not work with you unless you have an

International Association of Travel Agents (IATA) number. This takes some paperwork and you must prove that you have \$200,000 of annual revenue actualized. "Fortunately, when I was involved with ConferenceDirect, they met that qualification," Kainz says.

As an independent meeting and event planner, Kainz had to start over to get everything, ranging from business cards to billing processes, in place. She continued to develop her business infrastructure – website, personal spreadsheets for

tracking events and expenses, contacts and suppliers – until she was comfortable to go out on her own.

"There are many nuances behind putting a business together, and in this business, you usually don't get paid until the event has actualized. Some customers will provide partial payment up front; but most of the time, revenue comes to the planner through the commissions on hotel rooms or from the client for meeting management services provided. That's cash flow you

must be ready to weather until you get paid," Kainz explains.

Kainz and Remsik highly recommend joining professional associations to help you in your business. Kainz is past president of the Wisconsin chapter of Meeting Professionals International; it has chapters in every state as well as chapters in many foreign countries. "There are plenty of blogs you can follow as well. I find them all helpful," Remsik says.

## EXPERIENCE REQUIRED

The independent planners emphasize the need for experience. "You can't have just an interest in meeting or event planning, or thought you did a good job and had fun planning a wedding or family reunion," says Remsik. "You need experience in negotiating with suppliers."

Kainz says that experience has helped her address issues before they became problems. She recommends tapping into resources at local community colleges that offer hospitality and meeting planning programs. They can help you become a better negotiator or develop the skills to identify problems early so they can be addressed before they can affect the event's outcome. "Remember, you're dealing with your client's money. When you can help them head off a problem that helps assure the event's success, that's when you provide value to them," she says.

## CHALLENGES

As seasoned independent planners, Remsik and Kainz believe the independent meeting and event planner career is not for every planner. "If you're needing an 8-to-5 job, or can't withstand cash flow issues or some aspects of running a business aren't in your interest or aptitude, think twice about becoming an independent planner," says Remsik.

"Planning events is like a long marathon, with the last month a sprint," Remsik continues. "If you don't have the stamina for it, think twice about it."

For Kainz, the greatest challenge is dividing her work to meet her clients' vs. her company's needs. "I've learned to set a few hours aside every Friday to attend to my company's needs. Whether it's billing,

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marketing or other aspect of running the business, you must carve time out for it to be successful," Kainz says.

However, Remsik and Kainz place extra value on the flexibility their independent meeting and event businesses provide.

"Sure, it is 24/7 sometimes, but I can also carve out time for extended vacations or spend time volunteering for organizations that are important to me. I have learned to identify the tradeoffs," Kainz says.

Remsik says it's important to set aside some time for oneself. "It's easy to fall into the trap of working all of the time, and you do need some time away from the work to recharge. That's probably the best advice I can give anyone thinking about getting into this field: take the time to decompress so you don't burn out." WM



Clair Urbain is a freelance writer based in Fort Atkinson, Wis.



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