



Book Last Minute Meetings

Fern Dickey
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Recommendation

Let's get one thing out of the way: This is not a book about how to conduct last-minute meetings. It is a book about organizing conferences, conventions and other off-site gatherings that involve extensive planning - and preferably not at the last minute. That said, it's a useful book. Fern Dickey provides exactly the kinds of hands-on details that a virgin conference organizer would need, from online resources to relevant organizations, contact information, and sample charts that you can use for record keeping, budgeting and planning. There's nothing groundbreaking here, and there are no secret tactics revealed. Instead, Dickey has produced a thorough working reference that *BooksInShort.com* recommends to anyone new to the dizzying world of conference planning.

Take-Aways

- You need to do detailed planning to have an effective conference meeting.
- Give each detail a deadline and assign a particular person to carry it out.
- For a successful meeting, establish a clear purpose, so your meeting has a *raison d'être*.
- Have two sets of objectives - one for your organization, the other for attendees.
- Create measurable meeting objectives so you can assess your achievement, such as the number of participants or the income you expect to generate.
- Give your program a theme and title that supports the purpose of your meeting.
- Do research to assess what your prospective attendees want in the program.
- Incorporate your budget in the planning process so you stay on track.
- Select an appropriate destination and meeting site.
- Your choice of speakers can make or break your event, so choose wisely.

Summary

Planning Your Meeting

A good meeting requires effective planning. You have to be a real stickler for detail, which includes making a list of all the details, giving each detail a deadline and assigning a specific person or team to carry it out. Depending on how much you have to do and how soon your meeting is occurring, schedule frequent planning sessions with these people. Typically, expect to meet for a few minutes each day to review your list of activities and learn what they are doing or need from you.

“Three major pieces of your meeting that may be outsourced are destination management, registration and housing. They’re often outsourced because they’re time consuming, hard to do without experience, and so darned important to the outcome of your event.”

When you first set up your meeting, establish a clear purpose, a *raison d’être*. Everything you do in setting up the program should support this purpose. As you plan, factor in two sets of objectives - one for your organization and the other for the participants. Make these objectives quantifiable and measurable, so you can determine if you have met them. Typically, organizational objectives center on the number of attendees and the anticipated registration income. The participants’ objectives will depend on their satisfaction, such as a feeling that their sessions met or exceeded their expectations.

Setting Your Agenda

After establishing your purpose, select a focused theme and title for your program. This focus will make it easier for you to select topics for your sessions, design promotions and attract interest. Your theme may be your marketing tagline, such as, "Inventing Tomorrow: The Conference on Innovative Thinking."

“The bottom line is there are many events out there touting the same type of content. People will come to yours because yours looks professional and credible - and designers make that happen.”

You must understand what your attendees need, so your conference responds to their interests. Review recent trade magazines, newsletters and newspapers to spot recurring themes and become up-to-date. You can also interview and survey representatives of your target audience (including past or prospective attendees). Use phone interviews or mailed or faxed surveys, which can be set up to garner responses in less than 10 minutes. Conduct the research yourself or work with an advisory committee, which you can form by inviting 10 to 15 well-respected industry people to sit on an education committee.

“Having a theme and title for your program helps keep your focused. It also makes it a lot easier to select session topics, write and design promotions, and generate interest.”

Decide how long your program will be, and how you will divide the time among meetings, educational and social functions, and free time. Typical formats include holding a large general session with all the participants in one room or having small group breakout sessions on different topics in different rooms. To make your meeting more interesting, add other kinds of presentations, such as panel discussions with a moderator, roundtables, hands-on sessions and interactive sessions where the audience can respond electronically to questions. If your site has special attractions take advantage of them and let people enjoy them.

Organizing the Details

To keep track of your program planning, use a grid. List the time and session type for each day, so you can resolve time conflicts and help the event flow from one activity to another. The selection of a speaker is also critical. Chose speakers based on presentation skills (you must see a videotape or a live presentation), reputation, availability and fee.

“Think of your budget as a tool to keep you on track throughout your coordination of the event.”

Divide the tasks into three segments: pre-meeting, on site, and post-meeting tasks. Also, divide up the tasks according to who will execute them: you, your team, other individuals or teams in your organization or outside vendors and committees. If you break the planning and implementation process down into a series of procedures and steps, your arrangements will go much more smoothly and you will experience much less - or no - stress.

“To plan a perfect meeting, you need to be efficient. In terms of planning, you’ve got to make a list of every detail.”

For the sake of organization, keep two lists: a marketing schedule and an action plan. Use the marketing schedule to make sure you are creating and mailing all the promotional materials about the event on time. Use the action plan to track every other detail, from the audiovisual equipment you need to who gets thank you notes. Work backward from the date of the event to schedule deadlines. An Excel spreadsheet or Word document is an ideal way to keep track of data and then add details as you go along. Once you have an action plan set up for one meeting, you can use it as a guideline for future meetings.

Setting Up Your Budget

Your budget is critical to the planning process since it is a tool to keep you on track. You need to know how much money you expect to take in, how much you plan to spend and what your financial limits are. This will keep you solvent and will prevent you from spending yourself into a disaster.

“Your organization’s goals will likely revolve around meeting a certain number. The goals for the attendees will have to do with their participation.”

Include all the sources of income you expect, including registration fees, sponsorships, sale of materials, special event tickets and exhibitor fees. Separately list all your expenses: travel, lodging, speaker fees, vendor expenses, awards, printing and facilities expenses.

Do a breakeven/unit analysis to determine how many attendees must register at your proposed registration fee for you to break even. Divide the total fixed expenses by the price, minus any variable cost per person. This will help you decide if you can do the event at the proposed fee, or if you need to charge more or have a larger attendance. Use a budget sheet to help you analyze your revenues and expenses, listing your budget in one column, your actual income or expenses in a second column, and the variance between your budget and actual income in the final column. Deduct total expenses from your income to get your net. The most costly items will be hotel expenses, especially food, beverages, audiovisual equipment, speaker fees and expenses, and promotion costs. To stay on track, work closely with your accounting department and review your budget regularly with your team.

Selecting Your Site

Choose a destination that matches your meeting. Put it in the area where most of your attendees live, or use a hotel near an airport if you expect people to travel. Select a facility where the budget, size and amenities suit your participants. Some good sources of information about sites include convention and visitor bureaus (CVBs), major hotel chain’s national sales offices, colleagues who know the host city and online sources such as www.meetingsnet.com, www.eventsource.com, www.allmeetings.com and www.mim.com.

“Work backward from the date of the event to schedule deadlines.”

The different types of available meeting sites include:

- Conference centers.
- Convention centers, designed for large events, like meetings, exhibits, and trade shows.
- College and universities, which often have very economical facilities and an environment conducive to learning.
- Corporate offices and training centers.
- Theaters, museums, mansions, retreat centers and historic and cultural sites.

“To determine how many attendees must register, at your proposed registration fee, use a breakeven/unit formula.”

Before booking a site, visit the location and do a site inspection where you meet the person in charge of meetings at the facility. This on-site visit can help you decide if a site is appropriate for your meeting. However, if you or a representative can’t go there personally, telephone one or two key staffers at the site. Speak to someone in convention services rather than a sales person so you get a more unbiased point of view, since the salesperson’s job is to try to sell you on the facility.

“Before you purchase anything from an outside vendor, make sure you review a written estimate or contract and sign off on it. You can’t control your budget if you don’t do this.”

Create a "Request for Proposal" (RFP) that outlines exactly what you need at a site and ask each facility's management to submit a proposal to you that outlines what they can offer and how much they will charge. Once you make your site decision, go over the contract or letter of agreement carefully. Have it reviewed by a law firm with experience in such contracts.

Promoting Your Meeting

You can try to reach prospective attendees several ways:

- Direct mail - This includes anything written, designed and either printed, mailed or e-mailed. Allow seven to ten weeks to do the copy writing, design, printing, shipping, transportation and mailing. Sending an E-mail blast over the Internet or a fax blast takes less time. Usually, your best response will come from mailing to your host list, though you can get lists from other sources, such as list brokers.
- Public relations (PR) - This depends on free public exposure via articles in the media, broadcasts or arrangements with public speakers. You can launch your own public relations with a press release designed to intrigue reporters and editors. You can give selected media a more elaborate folder of promotional materials. This press kit can include your release as well as articles and clippings to attract increased interest.
- Advertising - Paid notices can be a powerful source of attention, but expensive. Consider seeking barter arrangements in your industry trade publications. Some might be receptive to a swap, such as exchanging ads for free registration for their publishers.
- Telemarketing - This approach involves making targeted phone calls to attract interest or explain more about your event.

Finding and Hiring Speakers

Your choice of speakers can make or break your event. Decide how many speakers you want and what type - an outside expert, a specialist, a motivational speaker or someone else? Good sources for finding and hiring speakers include speaker bureaus, authors of relevant books and articles, association directors, corporate marketing and public relations departments and colleagues or experts in your industry.

“Setting standards helps control expenses and helps everyone understand how their requests affect the overall budget.”

See a tape or hear the speaker before you decide. When you hire a speaker, obtain background information, seek references and talk to the speaker about what you expect. Determine travel costs (and who will pay them), audio/visual needs, fees, and other arrangements. Have a clear, precise contract. Just in case the speaker doesn't show - this is rare, but it can happen - have a contingency plan.

Working with the Facility, Vendors, and Attendees

When you have selected your facility, work closely with the catering director or, more typically, the convention services manager (CSM). Maintain close contact with the various departments, such as catering, banquet, audiovisual (A/V) and reservations. Give the hotel very clear specifications about your meeting. In turn, your contact from the facility should give you a complete packet of information about the venue, such as a map with layouts of the meeting rooms, menus and the AV rental list.

“Select speakers based on your program and budget. Don't hire a speaker without seeing a tape or a live session.”

Once people sign up for your conference, send confirmation quickly. Include packets with all necessary information and registration forms. It helps to have an on-site registration packet to help attendees make the most of their time at the event.

Work out your arrangements with outside vendors, such as the destination management company (DMC), which handles extracurricular events and transportation. Other vendors include those who provide reservation services, catering, security, photographers, florists, bands and others. Also, take care of all legal issues, such as cancellation and indemnification arrangements. If you take care of all these details ahead of time, you might even have time to enjoy the success of your meeting.

About the Author

Fern Dickey , CMP, is principal of the Meeting Planning Company, which specializes in providing planning and promotion services. She has planned a wide range of events - from small one-day seminars to black-tie awards banquets and special presentations to week-long educational programs.
