



***Your Meeting is on TRACK!***

## **PRE-EVENT ACTIVITIES – PHASE ONE (Pre site selection)**

### **Initial client meeting / needs assessment**

- Review goals and objectives for the event (include any ROI measurements)
- Discuss any past experiences with meetings (tax issues, who signed contract, direct billing of rooms, role of meeting planner)
- Desired date (range) preferences/limits
- General agenda (# days, type of functions – big tent/# break out rooms)
- Identify any major components of the event (exhibitor trade show, awards ceremony, music, entertainment, etc)
- Attendees (number and demographic profile)
- Geographic preferences/limits - create checklist of ideal geographic location including what amenities are desired nearby property (golf?) – is there a top 3 list?
- Venue preference (type of facility/amenities) preferences/limits – create checklist of ideal venue
- Budget ranges and identify type of contract desired (single binding)
- Scope of services requested of vendor (site selection, registration, agenda, speakers, materials, promotion of event, on-site work, etc.)
- Scope of services requested of venue (A/V, food, etc.)
- Identify any special or unique requirements (e.g. ceremonies, color guard)
- Review client decision making process/time frame – who signs contract?
- Is assistance needed preparing presentations? (PowerPoint, multimedia?)
- Confirm who can officially make mod requests on behalf of client. What is method of mods?

**Based on client direction, start site selection process**

- List potential cities based on client input, time of year, location of attendees, gov't regs regarding per diem.
- Write RFP and obtain client approval on specifications (be as specific as possible in the RFP to provide properties with accurate needs)
- Present possible facilities with a RFP with general needs outlined
- Review RFPs to assess best potential sites/cities (compare to checklists)
- Review cost (per diem and airfare) for each city option
- Collect material from CVBs of potential cities
- Present client with a presentation highlighting top recommendations
- Decide if site selection company will assist in process.

**Formal site selection & Gathering of contracts**

- Conduct site visit to the top selections (usually 1 to 3 properties are visited)
- Obtain referrals
- Client selects top selections (ideally in order of preference)
- Re-confirm dates are available
- Lock in dates with no commitment of top choices
- Solicit contracts from top contenders

**Prepare draft budget**

**Typical Items Include:**

- Meeting –planning services (labor & T&E)
- Marketing of event / any revenue from attendees
- Preparation of registration site & related services
- Participant hand outs (books, photocopying, CDs, ad specialties, etc.)
- Preparation of Powerpoint presentations/multimedia
- Name badges
- Signage
- Shipping
- Speaker fees
- Interpreter
- Transcript service
- Ground transportation
- Ceremony related costs (e.g. color guard, entertainment, live music)
- Meeting room
- Break out rooms
- A/V – including audio, LCD projectors, internet connection, flip charts, video, telephone service (including if needed at registration table)
- Computer rental (for internet café and/or meeting rooms)
- Camera and/or audio crew to record event
- Web casting (live or on demand)
- Airfare
- Per diem hotel nights / attrition fee
- AM/PM coffee service, water service/note pads in break out rooms
- Working meals
- Potential hotel charges include: box storage, deposits, housekeeper, cleaning, computer usage, electrical, copying charges, fax, late checkout, package-delivery, package shipping & receiving, parking, resort/activity per person, security. Convention centers have additional fees.
- Taxes and gratuities (clarify applicable state, local, occupancy taxes)
- Insurance
- If exhibition space: decorator and exhibition service companies, union

**Negotiate contract and sign**

- Negotiate contract terms and cost
    - Attrition clause
    - Single binding contract ideal
    - Cut off dates for releasing rooms
    - Billing and payment method (direct bill of rooms?)
    - Deposit amount to reserve
    - Payment terms (when net due and hold amount -80/20)
    - Reservation method (individuals call in or group)
    - Cancellation clause (event and individual rooms)
    - Acts of god (weather)
    - ADA requirements
    - Alcoholic beverages clause
    - Outside food and beverage clause
    - Promotional consideration
    - A/V clause
    - Negotiate for rooms to be comped or use “credit” for meeting space/coffee service breaks
    - Meeting planner office space
    - Room upgrades for selected attendees
    - Any specific sleeping or meeting room requirements
    - Obtain disclosure on any major work being performed on the facility and request clause to protect from unplanned work
    - Review all cut off/release dates
    - Review tax exemptions that apply (required certificates?)
  - Identify who (Track or client) will sign contract – if Track, provide necessary contract to support vendor exposure to financial liabilities
  - Have attorney review contract
  - Sign contract
  - Release tentative hold dates with other venues
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## **PRE-EVENT ACTIVITIES – PHASE TWO (Post-site selection)**

### **Consider local meeting planner to help with pre and during event activities**

#### **Registration options**

- Clarify methods for individuals to register for event (confirm if group or individual registration is applicable)
- Define registration fields
- Identify and build linked pages from registration site (directions, agenda, speaker bios, evening activities, cancellation/deadlines, what to wear, etc.)
- Set up web based registration page or use ASP
- Test registration page prior to marketing
- Determine how travel arrangements will be made (individual or group level)
- Determine if an additional block of rooms can be held outside of group hold (for those who miss deadline)

#### **Marketing/communication to attendees**

- Decide how to communicate details of meeting and registration deadlines
- Provide clear instructions on how to register
- Send reminder announcements as needed to prompt registration
- Design, print, and mail any hard copy marketing materials
- Determine how often registration reports will be provided to client (report should be de-duped if people register more than once)
- Desire on-site or post event survey (if so, identify method of collection, questions to be asked, and design)

#### **Agenda development**

- Confirm agenda down to half hour increments (post changes as identified to registration web site). Include when people will arrive and depart.
- Assist with content development as required
- Prepare any multimedia or PowerPoint presentations

#### **Notebooks / Handouts**

- Define exact notebook requirements (type of book, tab type, cover art)
- Gather all content by deadline (allow time for photocopying, assembly, and shipping)
- Produce notebooks and ship to venue to arrive on desired date (clearly marked for event)
- Prepare CD-ROM containing speaker's presentations and/or post to web
- Develop any curriculum needed
- Identify and order any ad specialties (give-aways) desired

### **Speakers**

- Identify professional and staff speakers
- Review a video tape of any potential professional speaker
- Review with speakers their needs (travel, lodging, items in room)

### **Signage**

- Determine quantity and type of signs required
- Design and print signs
- Ship to venue
- Message board for attendees

### **Name Badges**

- Decide type of badge holder
- Design template for badges (B&W, color) – designations on badges for location and/or type of attendee
- Based on “final” registration list, print badges
- How will walk-in attendees receive badges (printed on-site or hand written?)

### **A/V requirements**

- Flip charts
- LCD projector/screen
- Audio (mics needed for most rooms) – wired or wireless
- Internet / phone access in meeting rooms
- VCR, DVD player, TV
- Internet café for attendees to use (qty of computers, when available)
- Relate A/V needs to agenda & rooms and time)
- Web casting requirements (live or on-demand)
- Recording of events (which ones) and what type (video or audio only)

### **Meeting & break out room configuration**

- Size of each room / capacity
- Relate room needs to agenda (date and time) – require early or extended access to any areas?
- Configuration of chairs & tables
- Items to be provided at tables (water, notepads)
- Podium/risers
- Special needs per room

**Coffee breaks and food**

- Exact requirements for each service
- Determine banquet service by date/time (tie to agenda) – confirm menu items and if breakfast is hot or cold service. Decide where food will be served.
- Confirm any special needs related to food (vegetarian, kosher, etc.)
- Confirm final banquet event order (BEO)
- Confirm status of paying for food relative to government regulations (e.g. per diem, working meals)

**Discuss on-site activities/requirements**

- Hospitality items (goodie bags/gifts) for selected speakers/attendees
- Number of people at registration table (key activities expected)
- Arrange for local staff to man table (Kelly)
- Determine Track staff to attend event as key point of contact(s) & dates, (arrival and departure times)
- Identify key contact on hotel and client side (review if walkie talkies needed)

**Client status reports and meetings**

- Regular registration update (number and registration list as desired by client). Monitor for attrition penalty (if specified in contract)
- Weekly conference calls to review details – include hotel contact as appropriate to confirm details
- Pre-event client review meeting (held 1 or 2 weeks prior to event) – Review all details with all parties involved
- Review who can sign for changes (with or without fee impact) on-site
- Obtain name, phone (cell and office/pager) for all key service reps and suppliers, as well as client
- Confirm any mods to original contract

**508 Access / Special Needs**

- Identify individuals that require any form of assistance or have any special needs
- Confirm hotel rooms will accommodate needs (e.g. deaf room)
- Relate to rooms/agenda
- Coordinate with any providers (interpreter, transcribe) and insure that provider will meet the exact needs of attendee(s)

## **OPTIONAL MAJOR COMPONENTS CHECKLISTS**

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**Exhibitor trade show**

**Awards ceremony / Color Guard / Ribbon cutting**

**Public events**

**Live music or music licensing / Entertainment**

**Web casting (live or on-demand)**

**Raffles**

## **AT EVENT ACTIVITIES**

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### **Meeting among key points of contact - Track, hotel, and client**

- Reconfirm all meeting space requirements, set-ups, and guarantees
- Confirm sleeping room, special event, recreational, billing, and food & beverage details

### **Review meeting space – set up correctly?**

#### **Set-up registration desk**

- Setup day before or early AM
- Staff table
- Obtain departmental telephone list from facility
- Insure all items are ready
- Check laptops/printers
- Check phone service

#### **Monitor each day**

- Review all items posted to master account each day
- Review sleeping room pick-up
- Manage needs of VIPs, speakers, and attendees

#### **Attendee survey**

- Conference survey
- Break out survey

## **POST-EVENT ACTIVITIES**

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**Distribute attendee survey, report, and analyze results**

**Send out thank you letters**

**Prepare CD-ROM containing speaker's presentations and/or post to web**

**Review meeting details (post mortem lessons learned)**

**Receive invoice from property**

**Review for accuracy**

**Present to client for review and approval**

**Pay invoice**

**Prepare ROI if needed**