



SUCCESSFUL MEETINGS

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HOW TO PLAN A SUCCESSFUL MEETING

SO YOU'VE BEEN HANDED THE RESPONSIBILITY OF ORGANIZING AN OFF-SITE MEETING. YOU MAY FIND YOURSELF SEARCHING MADLY FOR REFERENCE MATERIALS OR EXPERIENCED PROFESSIONALS. DON'T WORRY, THERE'S NO SHORTAGE OF EITHER.

MEASURING VALUE

The best meetings support an organization's business objectives and help convey its overall message to those attending. The best meeting planners actively participate in honing the content to ensure that the meeting furthers the goals of the organization and is consistent with its mission. To measure the meeting's effectiveness, they are prepared to demonstrate its return on investment (ROI) to management.

Through ROI, organizations justify the dollars spent on meetings by measuring desired criteria, say, the knowledge gained by attendees or the increase in sales directly attributable to their participation. Determining ROI is accomplished through a variety of means, such as feedback from management, post-meeting evaluations and surveys.

QUESTIONS TO ASK

When handed the task of planning a meeting, first ask yourself whether there are alternatives to having a meeting at all. Is there a less costly way to communicate with this group, say, with videoconferencing or computer conferencing?

Chances are your organization will decide there is no substitute for a face-to-face gathering, so two other questions are in order:

- 1) What is the objective of the meeting?
- 2) Who will attend?

The answers to these questions will form the basis of all logistical decisions to come, such as where the meeting is to be held, the size of the budget, what type of hotel or other facility you will use, the content of the agenda, what type of recreation will be called for, and even how the chairs in the meeting room will be set up.

An incentive meeting held as a reward for salespeople will likely be held in an upscale resort hotel with recreation as part of the program. On the other hand, a short, hastily called brainstorming meeting is best staged at a business hotel, perhaps one

located near an airport so that attendees can get in and out quickly. Obviously, fancy meals and recreation will not be necessary. And a meeting called to teach salespeople a new skill will best fit in a conference center that specializes in training and team-building programs. There, some form of recreation may provide a welcome break.

SITE SELECTION

Only after you are sure of the nature of the meeting and what type of hotel or facility you will use, can you go about selecting a venue. For openers:

- 1) Contact the convention and visitors bureau in the destination you are considering. The bureau will send you literature that describes local hotels.
- 2) Consult a hotel directory.
- 3) Contact the sales offices of major hotel chains for directories of their properties.
- 4) Internet

After compiling a list of possible venues, send the sales department of each a request for proposal (RFP) outlining the requirements of your meeting. (If you're contacting several hotels in a destination, the convention and visitors bureau may serve as a middleman.) The RFP should include such information as the preferred dates for your meeting, the number and type of sleeping rooms you require, the range of acceptable room rates, food and beverage requirements, a tentative agenda and the amount and type of meeting space needed. This information will help the hotel decide whether it is able to host the meeting according to your specifications.

Based on the hotels' responses to your RFP, narrow down the field and arrange to inspect the hotel or hotels you're considering. Things to consider during a site inspection: overall appearance of the hotel and its guestrooms, lobby and meeting space; proximity to the airport and availability of shuttle services; attitude of the service staff; whether meeting rooms have obstruc-

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tions, such as pillars or overhangs, that interfere with audiovisual presentations; accessibility for people with disabilities.

If you cannot inspect the site in person, a detailed questionnaire will suffice. Also, many hotels have web sites that include layouts of their meeting space.

NEGOTIATING A CONTRACT

By now, you should be ready to accept a letter of agreement from one property. This outlines the space reserved for your group. You can begin to negotiate with the salesperson from the property on the terms of the contract that will eventually be signed.

If you've held a similar meeting before, you may strengthen your bargaining position by mentioning how much was spent on basic items. Nearly everything is negotiable: the sleeping room rate; the meeting room rental, which may be waived if the group generates sufficient guestroom and food and beverage revenue; upgrades to suite accommodations; meeting room equipment; and the complementary room ratio.

Regardless of the venue, make sure you have a written contract that outlines the guestroom commitment, room rate, complementary accommodations, reservation and deposit procedures, method of payment, meeting space, banquet space and cancellation policy.

DETAILS, DETAILS

After the contract is signed, your meeting file will be turned over to the property's convention services manager. Think of this person as your in-house meeting planner, the person who, from now until your meeting ends, will coordinate all your needs and serve as liaison between you and other departments within the property.

Leading up to the meeting, you will be confronted with countless details such as:

- 1) Transportation. Will flights be booked by your organization's in-house travel department or an outside agency? Airlines have special departments that handle groups. They offer discounted fares and cargo rates, complementary tickets (depending on the number of seats booked), and special ticketing and billing. How will attendees get from the airport to the meeting property? Taxi? Hotel shuttle? If you're expecting high-level executives or other VIPs, you'll have to arrange limousine transfers
- 2) Check-in. To expedite check-in, the property will need to be briefed on the arrival pattern of attendees.
- 3) Agenda. As the meeting nears, a schedule of meeting-related activities and food and beverage functions should be drafted and shared with the convention services manager.
- 4) Meeting-room setup depends on the nature of the sessions. Use an auditorium-style setup when a speaker is addressing the group. Arrange tables in a U for sessions where attendees will be interacting.

- 5) Audiovisual. Well before the meeting, talk to the convention services manager about your requirements and how the equipment should be set up. Bear in mind that some rooms have structural elements that are not conducive to audiovisual presentations.
- 6) Food and beverage. Menus should be discussed and confirmed with the convention services manager and with the catering department.
- 7) Recreation and special events. The convention services manager can assist in setting up recreational programs on the property, such as a golf tournament. Off-site events, such as dinners and outings, are best arranged through a destination management company (DMC), a type of tour operator that focuses on groups. Production companies can assist you with organizing themed banquets, Broadway-style shows or multimedia presentations. Ask the local convention and visitors bureau for a list of such companies.

MAKE YOUR MEETING INTERACTIVE

Interactive technology is having a huge impact on the meetings industry by providing new ways to improve understanding and learning, then measure the progress. Now planners have a more precise and immediate system for evaluating the results of a meeting.

A key element of this revolution in learning is the audience response system, which enables a presenter to ask questions and have the answers displayed instantly on a large screen in front of the audience. (Questions and answers can also be printed out and distributed after the meeting.) Attendees are given a wireless keypad with which they answer questions. They can pick Yes or No or punch in a number that corresponds to a multiple-choice answer. Answers are tabulated by an on-site computer, then displayed on the screen in various formats, such as bar graphs or pie charts.

Besides getting people involved in the learning process, the system makes it possible to obtain something long sought by presenters: immediate feedback. That makes it especially useful for business meetings, media testing and focus groups. Often, the audience is divided into teams that compete for the best score. Audience response systems can be used at virtually any meeting facility, whether in-house, off-site, or at several remote sites linked by videoconferencing. Setup time is nominal and price varies depending on the size and duration of the meeting and the amount of customization required.

ON SITE/AFTERMATH

Ideally, the meeting planner should arrive at least a day before the attendees. At that time, the meeting planner, the convention services manager and the appropriate department heads can discuss last-minute needs.

Some form of post-meeting evaluation is necessary to determine the meeting's ROI. Example: a questionnaire distributed to attendees plus follow-up interviews with attendees and managers.

CHECKLIST: EVALUATING THE MEETING

OVERALL EVALUATION

- Was the on-site registration handled efficiently?
- Did the program stay within budget?
- Was the room block filled?
- Were meal guarantees accurate and breaks on time?
- Was signage well anticipated and well placed?
- Were the floral decorations fresh and well-placed, and did they meet expectations?
- Were the meet room setups correct?
- Were speakers on time and in the right meeting rooms?
- Did audiovisual equipment function properly?
- Were transportation arrangements adequate?
- Were themed events appropriate?
- Were social activities, special events and entertainment well attended and well received?

PROGRAM CONTENT AND ATTENDANCE

- How soon after the first mailing did registration for the event start coming in?
- Did attendance grow over the previous year, or was it on par with or lower than similar meetings?
- How well attended were the individual sessions?
- Did attendees arrive on time, and did they stay until the end of the sessions?
- Was attendance higher at social events?
- Were speakers engaging, interesting, informative and well prepared?
- Were session topics relevant to the meeting?
- Did speakers have an adequate number of handouts?
- Were the speakers well received by the audience?
- Was enough food served, and was it well received?
- Was there enough time to view the exhibits?
- At what times did attendees visit the exhibition?
- Did visits coincide with promotional activities?
- Were giveaways and promotional activities well received?
- Was the location of the exhibition convenient to the meeting location?
- Were exhibits educational and pertinent to attendees?
- Were spouses clearly identified?
- Was parking adequate?

REGISTRATION AND STAFFING

- How efficient was the event registration process?
- Were staff members well briefed on their assignments?
- Were staff encouraged to talk to and listen to attendees for feedback and to note comments?
- Was a post-conference meeting held with members of the hotel staff to collect evaluations?
- Did identified VIPs receive the appropriate level of service?
- Did attendees have problems unrelated to the programs?
- Were staff members calm during mishaps or emergencies, and did they respond well to attendees' concerns?
- Were volunteers knowledgeable of their assignments, on time, helpful and courteous?
- Was there a volunteer appreciation event? If so, was it well received?
- Was security well-placed, visible and professional?

EXHIBITOR EVALUATION

- Describe attendance/traffic on each day of the exhibition?
- What hours had the highest and lowest traffic?
- How interested in the exhibits did attendees seem?
- Were attendees qualified buyers?
- How were the services furnished by hall or show management rated?
- Was there adequate time for booth setup and take down?

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