Professional Meeting Management

a guidebook for those interested in the meeting and event industry

is this your career calling?

Niki Kalemnous • Spring 2009 Independent Study
In our world of emails, conference calls, and web seminars, it’s easy to forget the value of face-to-face communication. But the meeting planner never forgets. In fact, the meeting planner’s job wouldn’t exist if it weren’t for the very idea that no matter how much technology has invaded the workplace, meetings are vital to a company or organization’s success. So vital that on average, conventions, exhibits and meetings make up 32.6 percent of an organization’s income for the year.

In this guide, Professional Meeting Management (PMM), we will explore where this industry stands and the type of work you can expect to get into as a meeting professional. All of the information provided is based on the expert knowledge of the Professional Convention Management Association (PCMA), a national organization dedicated to the progression of this dynamic industry. Their monthly magazine Convene has rightfully earned honors and recognition for its high quality of educational content, as well as its innovative design.

As you read through the PMM guide, I hope you’ll gain insight into the wide range of responsibilities a meeting planner carries. When I first became interested in this field, I imagined an event planner’s typical day to be, well, glamorous. Though shortly after I began an internship with a full-service event production company, I discovered that sixteen hour days with no time to eat and throbbing feet didn’t exactly match up with my perception.

That isn’t to say there’s no glory in meeting planning. When it’s showtime and the doors to the event open, it takes just one look around to realize how much your hard work has paid off. The conversations, networking, and progress the attendees are making seem to make it all worth it.

Here’s to face time,

Niki

Niki Kalemnous
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A meeting has the potential to shape the attendees perception of the host organization. For this reason alone, a meeting planner carries a huge responsibility. Orchestrating a 2-or 3-day meeting for up to 1,000 employees can’t simply be thrown together. It takes a professional...and it takes attention to detail.
A fast-paced and demanding career, meeting and event planners have the responsibility of coordinating everything from the meeting or convention facilities to negotiating contracts. The extensive checklist of tasks to accomplish requires the planner to constantly multi-task. The job also requires the planner to face multiple deadlines while overseeing a range of operations.

What to Expect in This Career
While planners can spend a majority of their time in the office, they are required to attend a great deal of meetings to prepare for an event, and to visit prospective meeting sites. National and International organizations may hire planners, which may require travel to more distant locations, including travel abroad.

Work hours for a meeting professional can vary according to their event schedule. They can expect to work more than 40 hours per week during the time leading up to a meeting. Additionally, they may be required to work very long nights, as well as weekends.

The Skills Required
Meeting professionals must have excellent written and verbal communication skills and strong organizational skills. They must pay close attention to detail, work under pressure, and maintain composure in a stressful environment.

Planners should have adequate qualitative skills in order to understand budgets and contracts. They also need exceptional computer skills to prepare proposals, letters, and other correspondence.

Job availability
In 2006, meeting and convention planners held about 54,000 jobs. In the upcoming decade, meeting and convention planning is expected to grow 20 percent, faster than average for all occupations. Specifically, the medical and pharmaceutical sectors will experience large increases in meeting activity, requiring more planners.

Certification
Planners with a minimum of 3 years experience, full-time employment in the industry, and proof of accountability for successfully completed meetings can become a Certified Meeting Professional (CMP) upon completion of an exam. The Convention Industry Council offers this credential, which is widely recognized and may help planners in career advancement.
In today’s world, meetings are becoming more critical to organizational success than ever before. A well-planned meeting creates a positive learning environment and a setting for connection, challenge, and support for the attendees. Meetings may include sales or marketing meetings, trade shows, or educational conferences and can range from a small task force meeting of 20 to a 3,000 person convention. Financially, meetings are so crucial that on average, conventions, exhibits and meetings make up an astonishing 32.6 percent of an organization’s income.

Goals and Objectives of a Meeting
In order to develop a successful meeting, the stakeholders and meeting planner must begin by creating specific goals and objectives. To create the objectives, the stakeholders of the meeting start by identifying their needs, desires, and challenges through a needs assessment. Stakeholders are the individuals who are invested in a project or event and can include sponsors, attendees, vendors, or the media. Each stakeholder may have their own objectives, that is, their reasons for attending or participating, and the meeting planner must always be aware of these.

The Needs Assessment
A needs assessment helps the stakeholders and planner develop clear, measurable goals and objectives. The assessment includes collecting and analyzing meeting history, which includes data such as the industry standard APEX Post-Event Report (a detailed financial report of the meeting), attendance figures, attendee sponsor and exhibitor demographics, revenues, meeting content and program design, and evaluation data. The needs assessment also includes meeting host information like the vision, mission, or strategic goals, and also challenges facing the host organization.

Putting the Needs Assessment to Use
Once the needs assessment has been conducted, the host organization can create the meeting objectives. The Professional Convention Management Association suggests breaking objectives down into levels 0-5, as explained in the next section. This system provides the framework to create clear, specific, and outcome-based goals.
Creating the Meeting Objectives

0- STATISTICS, SCOPE, AND VOLUME
Measurable statistics that are easily collected following a meeting. They are clearly worded, attainable, and specific to the meeting.
Ex. Sell 200 trade show booths at a rate of $1,500 per booth.

1- REACTION, SATISFACTION, AND PLANNED ACTION
This refers to the satisfaction levels of the stakeholders to meeting elements, components, content, speakers, and so on. These objectives are attitude-based, but clearly worded and specific.
Ex. Eighty percent of attendees would recommend the conference to others.

2-Learning
These are the objectives that address what attendees will acquire at the meeting in terms of knowledge, skills, opinions, and professional contacts. These objectives should describe behaviors that are observable, measurable, and attainable and should specify what the meeting attendee will be able to do at the end of the meeting.
Ex. Score 75 out of 100 or better on a new sales strategy quiz given at the end of the sales meeting.

3- APPLICATION
These objectives address what the attendees will do with the knowledge, skills, and professional contacts acquired at the meeting back in their workplaces. Again, these should be outcome-based, clear, and specific.
Ex. Achieve 75 percent of action plan (that was developed at the meeting) within 3 months of the meeting.

4- BUSINESS IMPACTS
What personal, professional, or business impact the meeting will have on the attendee, meeting host, exhibitor, sponsor, speaker, and so on. This should specify a business measure that the attendee has accomplished on their job such as time savings, increased productivity, or reduced costs.
Ex. Increase sales from existing customers by 5 percent within 9 months of the meeting.

5- ROI
The objectives addressing what the return on investment will be for the meeting host, attendees, exhibitors, sponsors, and so on. The formula to determine the ROI percent is meeting benefits-meeting costs/meeting costs x 100.
Ex. Achieve a 25 percent ROI within 12 months of the meeting.
The selection of the meeting site is a critical factor in the success of the meeting. To select the site, the planner must have excellent perception skills and pay close attention to details. The setting must provide a comfortable and pleasing environment and be logistically suitable for the meeting. Here are the considerations a planner must make before choosing the right space.
Identify meeting objectives
The meetings’ objectives will indicate the appropriate setting for the meetings. For instance, an airport facility would be a good choice for a brief business meeting, but a resort may be more appropriate for a meeting with informal discussion or reflection.

Gather historical data
This step requires gathering all the past records including past meeting attendance, financial performance, and service use. Sleeping room usage, daily meeting space allocations, food and beverage requirements, and exhibit space needs are all things that are considered.

Determine the physical requirements of the meeting
A planner must determine whether the site has the space requirements needed for the meeting. He or she considers:
- Dates of the meeting
- Anticipated attendance
- How many sleeping rooms will be needed
- How many meeting rooms will be needed
- What food and beverage event will be held
- If exhibit space is available
- If there is an area available for registration
- If there is ancillary space available for supplies such as A/V or other equipment
- Site inspection
- Other external factors such as the meeting’s future growth potential

Consider attendee interests and expectations
A planner must consider surrounding attractions that will please the attendees and what leisure-time activities are available. A profile of attendees can be developed by evaluating things such as the average age of attendees, percentage of the group being male versus female or whether the attendees will want to bring family members.

Select a destination and the type of facility
Again, meeting objectives will usually indicate the type of facility where the meeting should be located. Many groups establish a rotational pattern for future sites, moving from one region to another, or holding a meeting in the same area every three to four years. The hosting organization may also consider travel convenience and cost for the maximum number of attendees. Another factor to consider is whether a metropolitan or suburban area is more appropriate. Airports, resorts, conference centers, and convention centers are typical choices and should all be considered.

Prepare meeting specifications and a request for proposal (RFP)
An RFP provides meeting specifications for facilities to assist them in evaluating the appropriateness of their property for the group. Preparing this document requires careful thought and articulation. Some specifications may include number and type of guest rooms required each day, range of acceptable rates, and food and beverage expenditures per event.

Review and evaluate sites
This step requires assessing the space adequacy. It also requires a site inspection which considers the destination’s accessibility, environment, hotel accommodations, meeting space, food and beverage service, exhibit space, offices, equipment, and other services.

Select the site
Now the planner is ready to select the site. The host organization must approve and then negotiations are conducted.
a walk down the aisle of a TRADESHOW
Meeting planners must understand the benefits of adding an exhibition or trade show to a meeting and how it creates an opportunity for buyers to meet sellers. A well-planned exhibition can provide a substantial source of revenue for the organization, a marketing opportunity for exhibitors, and a learning opportunity for its members and attendees.

**Financial and Attendance Benefits**

In addition to financial benefits for both the sponsoring organization and exhibitors, when held in conjunction with a meeting or education conference, a tradeshow can help stimulate or enhance attendee participation in the overall event. Additionally, an exhibition gives attendees the opportunity to make purchasing decisions in a comparative marketplace. Trade shows are also a cost-effective marketing opportunity compared to reaching the same number of customers through direct sales.

**The Trade Show Location**

The ideal venue for a successful exhibition should have adequate space to hold both the meeting and exhibits under one roof. Convention centers and convention hotels have such facilities, but other choices may include universities, market centers, and outdoor facilities.

**Determining the Space Needed**

When determining the space needed for booths, the general rule for event planners is to double the estimated net square footage needed for booths (to account for aisle space) to determine the gross square footage needed for a tradeshow. Other factors to consider include the number and size of nonstandard booths (e.g., island booths, peninsula booths), the amount of space needed for the organization’s displays, special feature exhibits, lounge areas, concessions, and whether the registration area and show management office will be located inside the exhibit hall. A meeting planner commonly reviews other events in the specific industry to help the reach a reasonable estimate of the space needed.

Data according to the Center for Exhibition Industry Research 2008 report.
Increased globalization has caused many U.S.-based organizations to host international meetings. Not only does this type of event offer communication benefits, but it also provides the opportunity for attendees to conduct potentially lucrative international business. In addition, hosting a meeting internationally can satisfy and increase membership for the host organization. If an international meeting is hosted in one’s own country, it is termed an inbound meeting. International events held in a foreign country are termed outbound meetings. In both cases, a meeting manager faces great challenges when planning this type of event. In addition to expertise in managing and organizing an event, international meeting planners must have intuition, common sense, diplomacy, and respect for the culture of both the host country and the international participants.

The Challenges in Planning an International Meeting

The planning for an international event must begin further in advance than a domestic event. A sound timetable allows for unexpected events, such as mail or transportation strikes and delays in communications because of language differences. International planners must successfully work with counterparts, such as travel agents, professional interpreters, and destination management companies. They may also work with a professional congress organizer (PCO) when hosting a meeting outside North America. A PCO assists in local arrangements ranging from transportation needs, social programs, or facility bookings.

Selecting a Site

When selecting a site for the international meeting, the organization and planner must consider a number of factors. Convenience, cost, safety, and desirability frequently come into play. The site inspection and selection process is similar to a domestic site selection; however the planner must also give attention to customs regulations, political and economic climate, currency exchange restrictions, and transportation access.

Currency and Meeting Budget Considerations

International meetings are especially tricky, with cost depending on fluctuating exchange rates. With the U.S. dollar currently weak and the economy continuing to falter, organizations must consider whether they can commit to a meeting in an international city. Planners and suppliers now have to be more creative than ever in keeping costs down, rethinking their budget and negotiating special deals. Special events and extras such as décor and gifts may be among the first items cut.

Promoting Attendance

Attendance promotion for an international event is complicated by language and cultural barriers, and also the unpredictable nature of overseas mail. Now, with worldwide Internet access, a website and email marketing...
are especially useful strategies for reaching a wide market. Using the internet to promote the event is also extremely cost-effective. Whatever medium, planners and program directors must design a “can’t miss program,” ensuring that there is a profitable, educational rationale for the expense of traveling internationally.

**International Negotiations and Contracts**

Legal issues arise when planning an international event. In this respect, a planner must know how to negotiate successfully and understand contracts.

**Negotiating Rates**

Before any negotiation, the planner must develop a goal. Developing a plan for negotiation must be tailored to the items on the table. For instance, when negotiating in a hotel setting, the planner must consider the length and time of stay, and other services such as parking or nearby attractions. Most hotels will not confirm a guaranteed room rate more than a year in advance. It is important for the hotel and meeting manager to negotiate reasonable hotel rates that reflect the current economic environment, so the hotel has every chance to fill. A planner does not want attendees to book hotel rooms outside the block if they can get a cheaper rate at a comparable hotel, so he or she should research rates in all surrounding cities.

Other negotiable items a planner must consider include:
- Exhibit space rental fees
- Complimentary rooms for preconvention set-up trips
- VIP room upgrades at the group rate
- Microphones and other A/V requirements for meeting rooms
- Hospitality suites and receptions (complimentary beverages or wine-and-cheese party)

**Contracts**

Once a meeting professional has negotiated all necessary items, he or she must carefully review the contract. While planners are not expected to be experts in contracting and legalities, they should advise in-house legal resources or obtain the services of an outside legal counsel who is an expert in hotel contracts and convention center licenses. A well-written contract should accomplish both parties’ mutual objectives and include the following items:
- All rates and prices specified
- Statements of intents and expectations of both parties
- All applicable deadlines
- Allocation of liability between the parties for injury to persons and damage to or loss of property
  - Specific remedies for breach or default by either party
- Contract language that is legally clear, precise, and inclusive of all important terms
Impact on Tourism

The role of the convention and visitor’s bureau

During the meeting planning process, a planner will often need expertise on the area where the meeting is being held. A convention and visitors bureau (CVB) can provide this expertise and contribute to the success of a meeting. A CVB is generally a non-profit organization that services all types of travel and tourism-related business. They serve as the destination’s official contact point for meeting managers, tour operators, and individual visitors. When a planner understands the mission of the CVB and works effectively with them, attendance can increase and, subsequently, the return on investment can increase, as well.

The CVB’s Function

The core purpose of a CVB is to generate visitor demand to its area. They measure their success based on overnight visitors, hotel room nights, visitor spending, and economic impact. The CVB achieves its goals by working to solicit, qualify, and confirm groups to hold meetings, conventions, and trade shows in the area it represents. Some CVB’s even allocate all of their human and capital resources to attracting convention business. They also work to facilitate relationships between the meeting manager and local businesses. Another way they achieve their goal is by servicing visitors, including convention delegates, to encourage them to stay longer and see more of the area.

The CVB’s Sales Process

The CVB goes through the following sales phases to successfully bring and conduct a convention to their city:
- Research and qualification
- Building awareness with targeted clients
- Solicitation
- Bid
- Negotiation and contracting
- Event promotion and exhibitor and delegate attendance building
- Planning and managing the event
- Post-event and re-booking

The Meeting Planner and the CVB

Successful CVBs will maintain quality relationships with meeting managers. They are focused on optimizing success of meetings, being a trusted partner, providing accurate information, and delivering innovative service offerings. Once the decision is made to meet in a city, the CVB will assign a convention services manager (CSM) to the meeting group. The CSM is responsible for helping to plan a successful meeting by working as an extension of the meeting manager staff in the host city. He or she has the unique ability to work throughout the community, rather than just one facility, and is familiar with the full range of services and suppliers available.
Singapore

With cities across the world constantly undergoing exciting changes, meeting planners must always keep up with new attractions when choosing the event destination. An abundance of new developments, an exhilarating mix of facilities and activities, and a prime location all make Singapore a luring location for groups and meetings.

In 2007, the Union of International Associations named Singapore the best city for international meetings. Asia Pacific is expected to attract more than 100 million convention and meeting attendees by 2015, up from 40 million in 2002. This city also won the right to host the first-ever Youth Olympics in 2010. This year, the Marina Bay Sands, Southeast Asia’s first luxury integrated resort, is expected to debut. The resort will feature Singapore’s first casino, three hotel towers housing 2,600 luxury guest rooms and suites, and world-class retail, dining, and entertainment options. In addition, convention facilities will span more than one million square feet, allowing for more than 2,000 exhibitor booths and up to 50,000 delegates.

One of the most exciting entertainment options in Singapore is the Singapore Flyer. This attraction, situated in the Marina Bay area at 42 stories high, is currently the world’s largest observatory wheel. The Flyer provides visitors with a breathtaking view of the city and with each capsule accommodating up to 28 people, this is the ideal venue for cocktail receptions.

Other attractions that will lure in groups include the highly anticipated Sports Hub. Set to open in 2011, this will be the first large-scale land-and-sea-sports venue in the world. Features will include a new 55,000 seat National Stadium with a retractable roof, a 3,000-seat multipurpose area, and the existing 12,000-seat Singapore Indoor Stadium.

With new facilities and attractions debuting, Singapore can now offer a wide variety of options for corporations and organizations to work and play. The city now has a modern infrastructure and strategic location, making it a convenient and exciting city for group events.
A multibillion-dollar industry, meetings and events are responsible for the creation of thousands of tons of waste each year. An average five-day meeting with 2,500 delegates can use up to 90,000 water bottles—an astonishing figure for professionals in the meeting industry to consider. Because of this environmental impact, many organizations and businesses are now choosing to conduct “eco-friendly” meetings. Simply by virtue of meeting in green facilities, they are successfully feeding this eco-movement.

Green Facilities
Convention centers and hotels across the country are leading the green movement. After assessing their environmental impact, meeting facilities have begun building projects, upgrades, and system changes. Although green renovations and building projects are expensive, convention centers have already seen beneficial results. While currently green requirements don’t seem to “make or break” the site decision, sustainable organizations and hosts enthusiastically support green facilities, and are pushing other centers to follow the movement.

The Future of the Green Meeting
Professionals in the meeting industry shouldn’t expect to see a decline in the greening of convention and meeting facilities. According to McGraw-Hill Construction, in 2009, 20 percent of corporate America engages in green practice 60 percent of the time—and the number is only expected to keep on rising.

What Makes a Green Meeting
A green meeting would incorporate practices such as the following:
- Waste sorted and recycled
- Minimal and recyclable packaging containers
- Room blocks within walking distance of a center
- Public transit
- Hotel green programs
- Green (and reduced) printing
- Environmentally responsible displays
- Energy efficient lighting
- Excess-food donation
- No paper handouts
- Less exhibitor collateral
Gina DeBlasis always took interest in planning events. During her four years at Bethany College in West Virginia, she pursued this interest through the Student Activities Board that brought guest speakers and concerts to the school. While Bethany College did not offer an event planning major, Gina still gained relevant knowledge as a communications major with a focus in public relations and a minor in management.

Upon graduation, Gina held two jobs in public relations before moving into a position with The Event Group, a Pittsburgh-based full-service event production company. Here, Gina began work as a Senior Event Planner where she manages a multitude of events each year ranging from small private events to conventions and tradeshows. Some large-scale events that Gina has managed include The Pennsylvania Restaurant and Foodservice Expo and The Pittsburgh Wine Festival. Her responsibilities have increased since she began working at The Event Group and in 2008, she coordinated one-third of their events.

Gina said her favorite event that she has planned was a New York City-themed event for the Pittsburgh Public Theater. “They are a creative group by nature, and they really let us work outside of the box for them,” Gina said. She also stresses how event planning is not glamorous, as most envision. “We don’t ATTEND the events. We’re usually behind the scenes all night long and hanging out with the caterer and photographers,” she explained. Additionally, Gina said that she has been required to work four weekends in a row in some cases.

Gina’s best advice to those interested in entering the field: “In this industry, it’s all about patience, organization, creativity, and common sense!”
Now that you’ve got a taste of the industry, you may want to research meeting planning in further detail. Here are some excellent resources.

**Professional Convention Management Association**

- [www.pcma.org](http://www.pcma.org)
- *Convene*, the leading meetings industry trade publication for education content
- *PCMA Guidebook*, fifth edition (available for purchase at most major book stores and at the PCMA website)

**Social Networking Sites for Meeting Planners**

Social networking sites have become essential in the meeting industry. Planners are using these sites as a tool to exchange ideas and best practices with like-minded colleagues. In an increasingly global market, social networks reach different geographical areas and demographics, giving planners a broad perspective on the issues in the industry. Moreover, by casting a wide net, meeting professionals can reach different cultures and gain different ways to look at problems. Social networks also allow people to become better informed before attending a meeting. A planner can “meet” a colleague on the site, and then have the opportunity to meet face-to-face. More than 100 social networking sites exist that are catered to the event industry. Create a profile and start networking on some sites to learn from the professionals themselves.

- [www.i-meet.com](http://www.i-meet.com)
- [eventmanagerblog.com](http://eventmanagerblog.com)
- [twitter.com](http://twitter.com) (follow meeting professionals)