

# Events Coordinator

## Job Description

- Facilitates the securing of appropriate venues for regional programs and events, including site inspections and negotiation of contracts.
- Coordinates on-site arrangements for all regional meetings and events, including regional competitions.
- Serves as or oversees the work of the Chair of the Regional Convention (CRC) as defined in the Guidelines for Regional Convention.
- Works in coordination with the Marketing and Education Coordinators on marketing events.
- Oversees registration for all regional events.
- Maintains contact with appropriate staff members at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains her successor.
- Appoints staff to assist in the implementation of her responsibilities.

## Planning and Scheduling Regional Events

A successful regional event rests in your hands! While that may sound daunting, the key to successful event planning is attention to details and negotiating a contract that meets regional needs.

There are at least a hundred ways to impact event planning ranging from temperature control to sound equipment, maps and directions to the event, schedules and agendas—every detail involving the event. These details are your responsibility, and done right, they spell success! Whether you are planning a regional event for a few or for the entire region, details can make or break the event, and most of the same details apply to any size meeting or event.

Before you begin searching for the appropriate facility for the event, consider the following background information to determine your facility requirements:

### Know your region

- Where are the choruses located?  
What are the highways the membership will travel?
- Does membership travel to meetings by plane? If so, airport proximity should be considered in site selection.
- Which choruses usually support this type event?

- What influences attendance by the regional membership?
- Advance promotion, cost of rooms, faculty, class topics, time of year (i.e. weather), etc.
- What is the priority of these influences?
- What are the membership's preferences?
- Hotel versus college campus facility, two to a room versus triple or quad, two to a room preferring two double beds, etc.

### **Know your requirements**

- How many attendees are expected?
- Anticipated number of sleeping rooms required for overnight attendees?
- Will the event have multiple classes in session at the same time?
- How many attendees are expected in each class?
- What other spatial needs does the region usually require, such as a separate registration area, ways and means area, etc.
- Will there be a need to take continuous notes in any class?
- Are risers needed? How many sections or sets?
- Are there enough nearby restaurants to feed the attendees in a timely manner?

### **Considerations When Selecting a Facility**

Once you have narrowed down the list of possible locations using your logistical and/or geographical requirements, you can begin the second phase of your facility selection process. This involves the selection of the actual facility.

For a larger scale meeting (and smaller scaled meetings depending on the geographical location), you may have better results by approaching the selection process within the context of a "bid." Contact the local convention and visitors bureau (CVB) and ask them for a request to all facilities to be sent on your behalf. You will need a list of your requirements; number and size of meeting rooms to be used, anticipated attendance, and anticipated number of sleeping rooms to be used. Remember that the more detailed information you can supply, the better the responses will be and the easier it will be to narrow down your choices.

You may already know the city and general location of the facilities you want to consider. In this situation, you need only contact the facility and ask for a meeting planner's kit in order to evaluate the facilities before you inspect them. Even though you already know which facilities you want to consider, it may be a good idea to contact the local CVB to arrange an inspection tour of the facilities you want to investigate.

Either way, you have narrowed down your location search and you will need to arrange an inspection visit in order to evaluate the properties. As mentioned, you can contact each facility yourself or you can allow the CVB to arrange an inspection tour for you. Properties involved in overnight accommodations and meetings are familiar with the practice of inspection tours. An industry standard is to allow access to meeting rooms, an example of a sleeping room, an example of a suite, and a candid discussion of what the facility is willing to do in order to win your business. You can also expect one of the

properties to offer complimentary (comp) overnight accommodation for you and/or your inspection team. It may be tempting to abuse this privilege, so be careful not to do so; your actions reflect on the whole organization.

## Regional Convention

The Events Coordinator oversees all of the activities and business relating to the regional convention. In conjunction with the regional management team, she has the ultimate responsibility for ensuring that the regional convention proceeds in accordance with international and regional policies and procedures. Your specific responsibilities are described in detail in the *Guidelines for Regional Conventions* (GRC). You will find it necessary to read the GRC in its entirety in order to fulfill your role as Events Coordinator as it pertains to the regional convention.

## Site Selection and Inspections

The Events Coordinator oversees site selection for all regional meetings and events, including regional convention. This includes making the appropriate site inspections to determine suitability. Section D of the *Guidelines for Regional Conventions* provides specific details regarding this function with respect to regional conventions. With appropriate modifications, this will also serve as a blueprint for other regional events, such as meetings and workshops.

While a regional convention may require the most complex facility requirements, each will have its own specific facility needs that will require your skills and attention to detail. Following are considerations when selecting a site.

### Before the Initial Contact

- Gather your region's history of previous events and put it in an organized format. Include your "no show" history.
- Determine events to book: sleeping room needs, meeting space and events needs. Determine what extras you need such as suites, upgraded rooms, or rooms for those on your committee. It will be helpful if you can enter this information in a chart or spreadsheet format for easy viewing.

### The Initial Contact

- Establish a sales department contact. Talk with your contact to begin establishing your relationship. A good relationship with the facility contact is really important. However, you might have had a great contact at a facility and when you return for another event, that person has left. Hotel sales staffs usually don't leave the business, they just move to another facility. Try to develop a good relationship with them and keep in touch. They might be an excellent contact for you at a later date in a different facility.
- Send the information on the upcoming event to your contact requesting a proposal.

- Set up a visit if you are still interested after you receive the proposal. Remember, this is the first offer and you may be able to negotiate a better deal.

## Site Inspection and Selection

- Site selection involves determining the physical requirements, the attendees' interests and expectations, selecting the general area and type of facility, and evaluating the choices.
- Your purpose is to look at the facility when making a site inspection and to build a relationship and alliance with your contact person.

## Negotiating a Win-Win Deal

- Determine what rates other groups are getting at your same time of year. Each facility has a peak, shoulder (mid-season), and low season. Know in which of these "seasons" your meeting will occur. Most facilities also have days of the week when business is the strongest, and this may affect your negotiations.
- Recognize that your meeting has a "value" to the hotel or other meeting site. For example, your meeting may have a greater value to a new hotel that's trying to establish itself or to a hotel that needs to fill its sleeping rooms.
- Know what is negotiable. Some examples of items you may want to negotiate include the size of the sleeping room block, rate for sleeping rooms, complimentary rooms, food and beverage considerations, parking, deposits, cutoff dates, and attrition/cancellation clauses.

## Communicating On-Site Needs

- Refer to the written copy of your setup needs and review them with your on-site contact. Keep the communication lines open; be available for last minute questions or necessary changes. Review the banquet event orders (BEOs); check meeting rooms for temperature comfort and necessary audio/visual equipment.
- Keep your on-site office staffed. Members need to know where they can find assistance with questions, or last minute problems. Be sure the office is staffed during announced time periods.

## After the Event

- Collect event statistics and review the pick-up report (the number of facility guest rooms actually used out of a room block).
- Write thank-you letters.

## Successful Negotiations

As the Events Coordinator for your region, you will be negotiating with hotels and facilities for regional meetings. There are many books available on the art of negotiating and your local bookstore can supply you with these. They will give you tips on the psychology involved in negotiating and you may want to investigate this. The information provided in this chapter will give you some of the basic information you need for successful negotiating.

Successful negotiations should lead to mutual respect and a win-win situation. To negotiate effectively, you must know the value of the meeting to the suppliers of the facilities. You are not only a buyer in this situation, you are a seller; their perception of the meeting value determines the cost to the meeting organizer and attendees. To do this, give them as much information about the meeting as possible and present it in a concise and logical format.

It is very important to have the history of the meeting from past years. The salesperson will want to contact the facility where the meeting was held previously and verify information, so be prepared to supply a contact and telephone number if possible. One possible format for providing either the projected needs of the meeting you want to book or the history of a previous one is included in this chapter.

Hotels determine the value of your meeting by considering several things including:

- The number of sleeping rooms needed
- The arrival/departure pattern
- The no-show factor (the percentage of people who make a reservation but don't show up and don't cancel the reservation)
- The amount of catered food and beverage
- The usage of their outlets (restaurants, bars, gift shops, etc.)
- The number of people likely to use room service

A hotel whose largest market segment is business travelers on Sunday through Thursday nights is more likely to value a weekend meeting to complete their week. Room rates vary from city to city. Costs will generally be higher in larger cities than in smaller towns. Resort properties can be quite costly during the "season," but offer good buys in off-season.

A hotel's largest profit center is its sleeping rooms. Approximately 75 percent of the room rate is profit while food and beverage generates 20 percent to 30 percent profit. In today's market, hotel rates are high and good deals on rates are difficult to get. If you can't get the room rate you want, you may be able to get other concessions that will at least help reduce the cost of what the region will be funding. An example might be special rates (usually 25-50 percent off the group rate) on rooms used for committee members, faculty, judges, or whomever the region is funding to attend. Complimentary suites, upgraded rooms for VIPs, complimentary meeting space, and amenities in VIP rooms are just a few of the concessions you might get. If you have flexibility in your dates, you are in a better negotiating position.

Negotiating with a convention center or a theater as a site for a competition or a show is a different experience. Some of the things they look at to determine rates include:

- Type of event (rock concerts are sometimes destructive to a facility)
- Nature of sponsoring organization; many have a lower rate structure for nonprofit groups
- Staging, lighting, sound, and video setup
- Amount of revenue likely to be generated in the concession area
- Amount of time required for move-in and move-out

- Show hours
- Amount of backstage space needed

Convention centers and theaters often have a printed rate structure for various types of groups and they won't negotiate those rates. They may be willing to make concessions on move-in and move-out time, backstage space, house equipment or staging provided, or other things that might reduce your costs. Provide them with as much information as possible at the beginning so they can help you determine how to create a win-win situation.

For hotels and other facilities, a multiyear contract can put you in a stronger negotiating position. Remember that you may not be able to get the low rates available a few years ago. Hotels and facilities have much more business than they did then and they are picking and choosing the groups they take. It is sometimes difficult to book your preferred site, much less get favorable rates. It is important to project the image of being financially conservative. Be professional when you explain your financial parameters for the meeting and for your attendees. Be organized, prepared, and dressed in business attire for the negotiation session. Enthusiastically sell yourself and your meeting and expect the best.

## Sleeping Rooms and Meeting Space

Name of Meeting: Sweet Adelines International Region X Convention

Location: Any town, USA Phone #: \_\_\_\_\_

Day	Wednesday	Thursday	Friday	Saturday	Sunday
Date	April 3	April 4	April 5	April 6	April 7
Block	20	225	350	350	Out

Agenda	Time	Function	Set-Up	# of People
Day 1 THURSDAY	3:00 p.m. - 10:00 p.m. 5:00 p.m. - 10:00 p.m.	Registration Exhibits	Tables (20) 10 x 10	Flow Flow
Day 2 FRIDAY	9:00 a.m. - 6:00 p.m. 9:00 a.m. - 6:00 p.m. 10:00 a.m. - 10:45 p.m. 1:00 p.m. - 2:45 p.m. 3:00 p.m. - 4:00 p.m.  10:30 p.m. - 11:00 p.m.	Registration Exhibits Quartet Reception President's Lunch Annual Membership Meeting Mass Sing	As set (20) 10 x 10 Reception Rounds Theater  Open space/misc	Flow Flow 120 60 500  400
Day 3 SATURDAY	7:00 a.m. - 11:00 a.m.*   8:00 a.m. - 11:30 a.m. 8:00 a.m. - 11:30 a.m. 10:30 p.m. - Midnight	Chorus A** Chorus B** Chorus C** Chorus D** Chorus E** Chorus F** Chorus G** Chorus H** Chorus I** Chorus J** Exhibits Registrations Afterglow-Cash bars	Rounds Rounds Rounds Rounds Rounds Rounds Rounds Rounds Rounds Rounds (20) 10 x 10s As set Rounds	50 30 90 60 25 75 150 40 125 80 Flow Flow 600

\* Most banquet space can be reset for a second chorus. There will also be heavy room service usage during this time.

\*\*Chorus Breakfast/Rehearsal

## Negotiating a Contract

Excellent information on negotiating a contract can be found in the *Contracts* section of this handbook. Please refer to this information for the legal aspects of contract negotiation. The following information is intended to assist you in discussing points to be covered in the contract.

- Dividing room panels are not soundproof.
- Discuss the necessity of designating the assignment of meeting room space to be used and include it in the contract.
- Discuss the effects of loud music or rhythmic beating of drums placed next door to an a cappella group or to a speaker, and try to include some type of protection in the contract. It is important to educate facility personnel on plans for the event, particularly when a speaker will be addressing the region in the evening when louder groups may be convening.
- Discuss placement of the region's registration area, ways and means area, etc. and include it in the contract.
- Discuss availability and any cost associated to tables, linens, chairs, easels, etc. and include it in the contract.
- Make sure you understand all deadlines and requirements for receipt of information.
- Be prepared to provide information pertaining to past events of the same nature and provide contact information at previous facilities used for these events.
- Be prepared to provide information on previous events regarding number of sleeping rooms booked and number actually used. If you can provide written documentation on the facility's letterhead, it would be even more helpful.
- Be sure to address a facility's tendency to overbook due to their experience with no-shows. Providing information regarding number of sleeping rooms booked to number actually used will prove this point.
- During negotiation discussions, be sure to give as much information as possible and be as honest as possible.
- Document, document, document because you can be totally assured that facility personnel will change and change in facility ownership is highly likely. Also, be aware that change in facility ownership does not entitle new owners to change a contract. When a facility is purchased, the facility's booked contracts are purchased as is at the same time. You may, however, include a clause that gives you the right to cancel in the event of a change of ownership or management.

## On-Site Management

By the time you arrive on-site for your meeting, most, if not all, of the details have been taken care of with the facility. Your primary purpose is to see that the instructions you have given the facility personnel are carried through.

One of the most important things to do is make sure at least one person in addition to yourself knows the details of the meeting. In case of an emergency, this person could carry on without you. You will also need people to monitor meeting rooms and staff an office, if you have one.

You and your assistant should plan to arrive at the facility one day prior to your attendees. This will give you an opportunity to have a pre-convention meeting (pre-con) and walk through your program with the facility personnel. You will have received a résumé and event orders from the facility listing your requests. The pre-con is the time to verify that all of your plans are in place. If there are any last minute changes, they should be covered at this meeting. The following areas should be discussed in the meeting:

- number of sleeping rooms blocked each night and the rooms picked up
- what meeting space is blocked when
- meeting space setup
- audio and visual equipment scheduled for each room
- catered functions
- miscellaneous functions
- bus pickup/drop-off – competitors and audience members – be sure an area in the parking lot is “roped/coned” off for bus pickup/drop-off

It is important to know who your contact is for each of the above-mentioned areas as well as how to reach them. Some facilities prefer that you call each department’s extension and some prefer that you call the facility’s operator and let her contact the correct person for your needs. At some facilities you will work directly with your primary contact for all of your needs. (This could be a sales person or a convention services person.) Check with your contact to see how the facility wishes to handle your requests.

When attendees arrive, you will want to be available for any check-in challenges that may occur. You might also want to have a central office or check-in point for your attendees where they can come if they have questions or concerns.

Meeting rooms should be checked at least 30 minutes prior to the start of each function to make certain the setup is correct and that the audio/visual equipment is working properly. It is also important to make sure the instructor/speaker has the supplies she needs and has water to drink. Check on the availability of a “Business Office” to make copies.

Meals should also be checked at least 30 minutes prior to their start. You will want to check the set-up and the number of seats available. You might also want to check on any special meals that were ordered such as vegetarian meals.

Sometimes a change from what was originally scheduled is needed on-site. Again, know who to call and how to reach her. When your contact is away from the facility, it is important to know who is on call. Be sure to share cell phone numbers with onsite staff, judging panel/panel secretary, faculty and committee members.

It is essential that you have an emergency plan in place. Where is the nearest medical facility? How will emergency situations be handled? How will non-emergency situations be handled? Who will be on call to handle these situations?

Following the meeting and prior to the time you leave the facility, you might want to meet again with your contact to go over the bill. This post-convention meeting is a good time to take care of any billing challenges you may have. Send a follow-up letter to the facility to let them know the level of success you had at the property and to give them any

final information they may need. Then, once the bill is received, you will want to review it for accuracy before final payment.

A final report of the meeting to the regional management team and for your files is a good way to look back and see if the property is one that you want to use again in the future.

## **Site Visit Check List**

### **The Destination**

- Accessibility
  - Ease and cost
  - Proximity to airport
  - Adequate taxi/limousine service
  - Sufficient parking space
  - Availability/cost of shuttle busing, if required
- Environment
  - Availability of local attractions
  - Shopping
  - Recreation
  - Restaurants
  - Weather conditions
  - Appearance
  - Safety of area
  - Economic health of community
  - Reputation of area/facility for hosting meetings
  - Support and services available from local CVB
  - Availability of experienced suppliers such as audio/visual firms, exhibit service contractors, temporary help, and security

### **The Facility**

- Efficient, friendly doormen and bellmen
- Attractive, clean lobby
- Registration desk easy to find
  - Sufficient space and personnel in relation to guestrooms
  - Ability to handle check-in/check-out times for major groups
  - Efficient front desk personnel
  - Place for people in wheelchairs to check-in
- Modern elevators in sufficient number to serve guests when the facility is full
- Accessible, fully staffed message and information desk
  - Rapid response to telephone calls
  - Quick delivery of messages
- Availability of guest services
  - Drugstore
  - Gift shop
  - Concierge
  - Safety deposit boxes for guests' valuables
  - Internet access

- Comfortable, clean bedrooms
  - Furniture in good condition
  - Modern bathroom fixtures
  - Adequate lighting
  - Adequate closet space and hangers
  - Smoke detectors in room
  - Fire exit information clearly posted
  - Availability of refrigerator and/or wet bar, if important to your group
  - Cleanliness of hallways, including prompt removal of room service trays from halls
  - Availability of beverage and ice machines on the floor
  - Service elevator accessibility
  - Size of standard room versus the deluxe room
  - Availability of an executive floor offering special guest services, if important to your group
  - Number and types of suites and availability of floor plans showing parlor and bedroom size and types of beds.
  
- Reservations procedures and policies
  - Room category classifications, such as higher floor versus lower floor, ocean view, or mountain view
  - Number of rooms in each category available for the meeting
  - Number of rooms available, if needed, for early arrivals and late departures
  - Current convention rate and current rack rate for individual guest (not part of a group)
  - When the hotel will provide firm rates for the meeting
  - Guarantee and deposit requirements
  - Check-in and check-out hours
  - Cutoff date when rooming block is released to the hotel for direct sale to others
  - Check-cashing policies
  - Types of credit cards accepted
  - Refund policy in case of cancellation

### **Meeting Space**

- Size (dimensions of meeting space, noting oddly shaped rooms)
- Capacities when set in various configurations
- Quality, condition, and soundproofing of airwalls used to divide a room into sections
- Separate light, heat, and air-conditioning controls in each section divided by air walls
- Time required to put airwalls into place
- Acoustical quality of rooms and availability of good sound system, if needed
- Built-in equipment such as whiteboards and screens, and permanent furniture that cannot be moved
- Obstructions such as columns

- For audio/visual presentations
  - Ceiling height of room
  - Obstructions which would block audience view of screen
  - Chandelier placement
  - Decorative mirrors which might reflect light
  - Blackout drapes for rooms with windows
  - Location of lighting controls and options for dimming
  - Location of fire exits
- Accessibility from a service corridor
- Cleanliness and general quality of public space
- Accessibility of meeting space from main lobby
- Relative proximity of meeting rooms to each other—all on one floor, or spread on various levels
- Availability of house and public telephones
- Location, number and cleanliness of restrooms
- Location and number of checkrooms

### **Equipment**

- Tables
  - Six feet long
  - Eight feet long
  - Schoolroom width—15 to 18 inches
- Chairs
  - Comfortable for long meetings
- Platforming
  - Steps for various platform levels
  - Carpeting and skirting for platforms
- Lecterns
  - Standing lecterns
  - Tabletop lecterns
  - Lectern lights
- Whiteboards and bulletin boards
- Sign easels
- Wastebaskets and trash containers
- Spotlights and auxiliary lighting equipment
- Remote control lighting capability if lights are to be controlled from the lectern or from a projection table that is not near a wall switch
- Registration counters
- Microphones

## Food and Beverage Service

### ☐ Public outlets

- Appearance and cleanliness
- Cleanliness of food preparation areas
- Adequate staffing at peak time
- Attitude of personnel
- Prompt and efficient service
- Variety of menu
- Cost range
- Reservations policy
- Possibility of setting up additional food outlets for continental breakfast and quick luncheon service, if necessary

### ☐ Group functions

- Quality of service
- Diversity of menus
- Creativity
- Costs
- Tax and gratuities
- Projected price increases before date of event
- Extra labor changes for small group functions
- Liquor laws
- Disallowed serving times
- Cash bar policies
- Bartender costs and minimum hours to be paid
- Cashier charges
- Refreshment break pricing
- Guarantee policies
- When guarantee required
- Number of meals prepared beyond guaranteed number
- Special services
- Tailored menus
- Theme party ideas
- Unique refreshment breaks
- Food substitutions for those with dietary restrictions
- Availability of table decorations
- Availability of dance floor
- Size of banquet rounds
  - For eight people
  - For 10 people

**❑ Room Service**

- Diversity of menu
- Prompt and efficient telephone manner
- Prompt delivery
- Quality
- Prompt removal of trays

**Suggested Timelines****Three to five years in advance of the event**

(Important Note: This date depends entirely on the region's Education Coordinator and the regional education plan. Every scheduled regional meeting/workshop/seminar should have a location selected for it, along with a signed contract.)

- Select facility and have contract signed. Read and re-read the contract. Remember that the hotel will protect itself and will not be looking out for your needs. Amend the contract when you feel you need to define expectations.
- Serve as counsel to the region's Finance Coordinator who will sign the final contract. Keep her informed about contract negotiations and be available to answer her questions about contract clauses.
- Confirm with the region's Education Coordinator that faculty has been secured and booked before a contract is signed. It is difficult to get out of a contract when the desired faculty does not have that specific date open.
- Highlight any deadlines on your copy of the contract. Make extra copies of the contract in the event the original is lost.
- Publish the date and location on the regional calendar. This is especially helpful to regional members who need to reserve future dates in order to attend.

**Eighteen Months to Three Years**

- Review contract to check deadlines.
- Check with region's Education Coordinator to confirm faculty availability.

**One Year to 18 Months**

- Check regional regulations or procedures regarding dissemination of information pertaining to this particular meeting/workshop/seminar/etc.
- Choruses usually do not require detailed information about an event at this time. However, for planning purposes, chorus members need to know the event's date, location, faculty, cost, and intended subject(s).
- Determine physical requirements from region's Education Coordinator which may affect the size meeting room needed, such as risers or staging area, and determine if additional facilities negotiations or contract amendments are needed.

**One Year**

- Review contract to follow up on any deadlines.
- Most facility contracts will stipulate that rates be set at this time.
- If not already done, check on regional regulations or procedures regarding dissemination of information pertaining to this particular meeting/workshop/seminar/etc. Chorus members usually want to know just the event's date, location, faculty, cost, and intended subject(s).
- Check the contract for any obligations or information requirements to be supplied by the region to the facility.
- If designation of assigned meeting space is part of your contract requirements, the contract will stipulate the designation at or around this time.
- If not already stipulated in the contract, set deadline for reservations to be received by the facility.
- Supply pertinent information, including rates and deadlines, to the region's Marketing Coordinator, or her designee, for publication and/or promotion to the regional membership. Timing and type of information required depends on the region's procedure(s).
- Revisit or verbally verify with facility personnel any structural changes the facility may have undergone or are anticipated to occur, as well as any organizational changes that may have taken place or are anticipated to occur.

**Six to Eight Months**

- If the facility agreed to supply reservation cards, you need to request the cards in order to have them ready to distribute with the event's promotional materials.
- Revisit or verbally verify with facility personnel any structural changes the facility may have undergone or are anticipated to occur, as well as any organizational changes that may have taken place or are anticipated to occur. Even if you contacted the facility one year before the date of the event, you will need to contact them again.
- If a meal function is planned for the event, contact the facility for menus, make menu selections, and negotiate a price. When planning a meal function for a large number of people, carefully consider the pros and cons of a served meal versus a buffet.

**Four to Six Months**

- According to the region's procedures, supply specific information to regional personnel responsible for dissemination. This should include maps and verbal directions, menu and costs of a meal if a meal function is included, any facility-related requirements, etc.
- Unless designation of assigned meeting room space at an earlier time was part of the contract, work with facility personnel to do so and obtain names of these rooms.
- Obtain from region's Education Coordinator, or her designee, any equipment needs or physical/room configuration requirements needed by faculty. International's sample form titled "Faculty Information Sheet" is an excellent means to obtain this information.

- If making reservations for sleeping room(s) for the faculty is a responsibility of this position, make them at this time.

### **Two to Three Months**

- Work with facility personnel regarding equipment needs and room configuration requirements.
- Remember that the word “risers” does not mean the same thing to facility personnel as it does to you. To people in the hotel industry, a “riser” means a platform that creates a stage or dais.
- Remember that projector use typically requires the use of a screen. These two items are separate and you need to request both from facility personnel.
- Work with facility personnel on any problems or concerns.

### **One Month**

- Make sure that assigned meeting room space is still assigned to your meeting.
- Provide meeting room names to regional personnel in charge of printing the event’s program.
- Check with Education Coordinator regarding any hospitality requests from the faculty and take steps to handle these requests.
- Provide a copy of the tentative or final schedule of events to facility personnel in order for them to distribute it to department managers and staff for planning purposes.
- Follow up on any questions or concerns from the facility personnel.
- Follow up on equipment requests and the possibility of any problems.
- Discuss possible situations that could impact the facility or its personnel, such as attendees remaining on the property for meals, room service requests, bar usage, etc.
- Make sure a master account is set up at the facility, unless this is a responsibility of someone else on the region’s management team. If there is a question, make sure someone is handling this matter.

### **Upon Arrival**

- Have a copy of the contract with you at all times.
- Check on the setup of the master account and what charges are authorized to be posted to it, unless this is the responsibility of someone else on the region’s management team.
- Provide an extra copy of the contract for the Education Coordinator in case there is a problem and you are not readily available. Take time to familiarize the Education Coordinator with the layout of the facility.
- Introduce yourself to the facility’s banquet personnel who will be handling or working on the event. Remember that shifts change and you will need to reintroduce yourself to all other shifts. Wear something that identifies yourself as the organization’s point of contact, such as a certain color of name tag or a distinguishable pin.
- Make sure the region’s registration area, ways and means area, etc. are setup correctly, and that the setup does not hinder traffic flow within the facility.

- Check in and obtain room keys for the sleeping room for the faculty, unless this is a responsibility of someone else on the region's management team.
- Check that equipment is on-site and operable. If batteries or bulbs are necessary for the equipment, make sure that replacements are available.
- Test the sound equipment.
- Make sure that fresh water will be available for speakers at all times.
- Make sure that announcements are made periodically regarding hotel policies on food and drink in the meeting room(s) and smoking.

### **Upon Departure**

- Check with the facility's banquet personnel and the facility contact to see if there were any problems stemming from your meeting.
- Check out and return room keys for the faculty, unless this is a responsibility of someone else on the region's management team.
- Settle the region's master account, unless this is the responsibility of someone else on the region's management team. If there are questions or problems, make sure someone is handling the matter.
- Write a letter to the facility contact to thank her/him for her/his cooperation and cite any successes or problems as a matter of documentation to the file. Whenever possible, try to obtain the name(s) of any of the facility's banquet personnel who were helpful to you and cite them in the letter as well.
- Request a letter from the facility contact to document your own files regarding the number of sleeping rooms booked and used, as well as any other information that would be helpful in future negotiations.
- Write a letter to the manager of the facility to recognize individuals who were especially helpful to you and cite any successes or problems that occurred.
- Write a short summary of the region's experience at this facility to document the file for future reference.

### **Other Tidbits**

- When preparing directions to the facility, remember that some people need verbal directions while others respond better to a map.
- There is usually a lot of discussion regarding the temperature of a meeting room. It has been proven that mental activity thrives in a cool atmosphere. So keep the room on the cool side. A setting of 60 to 65° F (15 to 18° C) is most conducive to learning. In promotional materials about the regional event, remind cold-natured individuals to bring a sweater.
- If you are using a community building, a church, or a building on a college campus, etc., remember that it is not part of the hospitality industry and amenities that come with using a hotel, convention center, etc. will not be available to you.
- If you do not currently negotiate designation of which meeting room(s) will be assigned for your use, consider doing so. This way, you may be better informed about what is happening on the other side of the dividing wall at the facility. No matter what facility personnel say, most dividing walls are not soundproof.

- Remember that hardly any meeting/workshop/seminar goes without some kind of mishap. Always appear cool, calm, and collected; you can scream some other time, behind closed doors. The best meeting is one where the audience has no idea that there has been a mishap.

## Trade Show Basics

To have a successful trade show, the most important ingredient is a good “Show Team.” The team members should represent the four primary job functions involved in any show/conference: sales to drive revenue; marketing to drive attendance and support sales; operations to make sure the show is produced successfully; and finance to organize and keep track of the budget. This group should be led by a show manager or director and needs to be aided by a support staff made up of sales, marketing, operational, and financial assistants.

Keep in mind that the above represents an ideal situation where time and resources allow for a complete staff. Before launching an event, it is important to develop a show profile: who is the target attendee? Who should exhibit? What is the reason for the show? Is there competition? Once this is decided, the basic structure should be adhered to in order to make the event successful. If there is a conference or educational program tied in with the trade show, there should also be a conference or education manager. This position should also be supported by an assistant(s).

The following paragraphs will define each of the four functions thought necessary to ensure a successful trade/public event. It should be stressed that organization and time management are of paramount importance. At least one year is needed to plan for a show. Cutting short the sales or marketing cycles can prove to be detrimental. Also, the budget needs to be developed in advance in order to know what resources are available and what risks are involved. The operations staff needs to know what is taking place in advance in order to set up contracts with the venue (building), hotels, etc.

Sales drives revenue. The **sales manager** is responsible for the sale of all exhibit space, advertising for the show program (given out to all who attend the show), and the newsletters published before or after the show. Another responsibility is sponsorship sales, which can include title sponsorships (companies that might want to share the limelight with the organization having the event), banners, billboards, aisle signs, special events (breakfasts, luncheons, cocktail parties), sponsorship of a special speaker or of the conference program. These are all excellent sources of revenue for any show. The sales manager is responsible for submitting a sales budget to the financial manager and for making sales projections to determine what the total show revenue might be. The sales staff should also be responsible for all customer service until growth warrants appointment of a customer service department. Forming and maintaining good relationships with all exhibitors, advertisers and sponsors is a major sales responsibility. Without these people, there is no show! The show director will depend on the sales manager to set the price of exhibit space, advertising, and sponsorships as sales is the team link with the customer.

The **marketing manager** is responsible for making sure that the show is well attended and for supporting the sales effort with pre-show, at-show, and post-show sales materials. Another major responsibility of this function is the production of all the materials, ads, press releases, and Web sites that promote the show to attendees. The main function of the marketing manager is to attract attendees to the show! After sales has sold all the exhibit space, the effort would be in vain if there were not sufficient attendees to visit the exhibits. At the same time, marketing produces the sales pieces to help the sales staff sell the exhibit space, advertising, and sponsorships. Marketing works closely with sales to create these pieces. The marketing manager forms relationships with the press and the media. Additional responsibilities are the ads necessary to promote the show and the show program. Exhibitor and attendee surveys used to conduct research are the responsibility of this function. Sales and marketing are both responsible for investigating competitive industry events.

The main function of the operations manager is to ensure that the show is produced and runs smoothly. Registration of both exhibitors and attendees falls under the operational umbrella as well as the relationships with the venue and the contractors. It should be noted that registration is one aspect of a trade show that can make or break it! A smooth registration process for exhibitors and attendees will make a show successful while an unpleasant experience can be a nightmare. The more preregistration that can be done, the better. This is encouraged through the advance marketing material. At the show site, it is preferable to have experienced registration staff people. Additional responsibilities are hotel, travel arrangements, and the production of the exhibitor's manual. Operations aids sales with customer service and marketing helps operations with the design of the manual. The exhibitor's manual is a vital tool for exhibitors. Exhibitors depend on this resource for comprehensive information to have a smooth at-show experience. The more information that operations can provide to the exhibitors, the fewer questions and problems there will be! The manual should reach the exhibitors three months prior to the show.

Operations directs all show vendors (concession, contractors, florists, cleaning people, electricians, telephone technicians, audio/visual, registration staff, any temporary help needed, etc.). Again, if there is a conference/educational program, operations works with the conference manager to see that participants' needs are met, rooms are ready, etc. The operations manager ensures that the move-in and move-out are smooth experiences for the exhibitors and, in this way, contributes to the customer service effort directed by sales. Another function of operations is to facilitate the communication that the exhibitors and sponsors might want to have with the building and the contractors and to act as an intermediary in this regard.

The **financial manager's** duties are to see that the budget is developed and followed. Finance is also responsible for invoicing exhibitors, advertisers and sponsors, and should help with collections when necessary. Another responsibility of the financial manager is the revenue generated from registration and from all paid conference/educational programs. The financial manager communicates regularly with all functions in order to keep track of the finances and to ensure that all bills are paid. The financial manager

works with sales, marketing and operations in order to be able to develop the budget and to make financial forecasts. Sales and finance should communicate regularly to see that all exhibitors fees are paid before the show. No company should be allowed to exhibit and no ads should be run if the bills are not paid in advance!

Finally, the show manager or director should oversee all of these functions and is responsible for regularly scheduled meetings to see that everything is kept on track. Each of the four managers should submit a monthly report so the director can see that goals are being met. The show director should work with each department to set the goals for each year and a team goal should be set. Each year, the show should be able to grow by a specific percentage along with the attendance. Research should be continued and the show director should analyze and interpret the data collected on surveys.

Trade shows are a lot of fun and can be very profitable if conducted properly. Remember that the exhibitor base and the attendee base need to grow together. The team approach to producing a show works well. Communication, as always, is the key! All four of the above-named functions should communicate regularly. Keep in mind that both the exhibitors and the attendees are customers and the better the customer service, the more successful the event.