



MEETING MASTERY *begins here.*

You have many factors to take into consideration when planning a meeting or event. The tips and checklists outlined here in our Concise Guide to Meeting Mastery will help you pull together a successful event. We've broken it all down into five sections: creating the framework, figuring out your general needs, selecting a location, getting a handle on your budget and organizing yourself with detailed notes in preparation for your meeting.

Create the Meeting Framework

The first thing you need to determine is the purpose and scope of the event. What is to be accomplished? Setting clear objectives is the foundation of a successful event. It helps you figure out what elements are essential. There are five basic questions to ask yourself, the Five Ws of meeting planning. They will form the framework on which to build your meeting or event:

- Why are we meeting?—Define the objective, reason or purpose for having the meeting or event. Is it training, announcing or showcasing products or increasing association membership? Purpose helps you determine need and set objectives.
- What will the meeting entail?—Determine the scope of the meeting (is it international, national, regional, state or local?) and, based on the event's purpose, define the most appropriate type or format (seminar, tradeshow, annual company or association gathering, board meeting).
- Who will be there?—Determine who will be attending the meeting or event (employees, executives, customers, industry executives, guest speakers, spouses or children). Ensure your guest speakers are relevant to your objectives and be sure your agenda is concise and applicable.
- Where should the meeting be?—Decide what type of location is most suitable for your event (resort, downtown city center, suburban, airport, conference center). Convenience to participants is generally a prime concern, but so is comfort. Attendees' travel to and from the event site should be as easy and as inexpensive as possible.
- When should the meeting take place?—If possible, be flexible regarding the dates for the event. This can improve the chances of obtaining first-choice hotel arrangements within your budget. Consider the time constraints of the participants. Arrange dates to minimize attendees' time away from office and home.



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Determine Your Requirements

One of the best ways to figure out your requirements is to develop a preliminary schedule. The schedule should be a general outline of what will happen and approximately when. The following list of considerations will help you think through these things.

- What part of the country or world is best for the event? Consider location of attendees, time zone and climate.
- How will the majority of attendees get to the hotel? Will they be driving? Flying?
- When will attendees arrive? For example, will participants get to the hotel the morning of the event or the night before?
- How many times will you need to feed attendees? Will all meals be planned or will some meals be “on their own”?
- Do you need to include any recreational activities such as sightseeing or sports outings?
- Approximately when will attendees leave? After lunch? Late afternoon? Evening? This affects issues such as check-out time, food service, travel arrangements and so forth.



Timing and logistics of the agenda are important parts of the preliminary schedule. Some primary considerations include:

- How many morning, afternoon and evening sessions will take place? Will more than one session be held at one time? Approximately how many people will attend each session?
- What meeting space and seating arrangements will be required for each session? Will you need a classroom arrangement? Theater? U-shape?
- Will audiovisual equipment be needed?

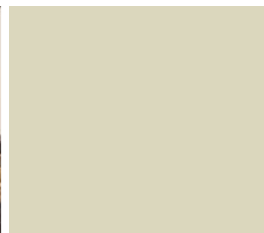
Lastly, get a firm budget to work with. You can't make any decisions unless you know what kind of costs you can bear. Ask the meeting initiator to give you a number. The larger the event, certainly, the greater the relative costs. But other factors can drive expenses, such as attendees' needs. Will you have clients to entertain? Will you need to provide gifts and extra amenities to certain guests? **We offer an easy-to-use Budget Calculator at www.crowneplaza.com/meetings.**

Select Your Location

The importance of selecting the right location can't be overstated. With an understanding of the meeting's requirements and budget, you can look for a hotel destination that meets your needs.

Facilities and services to consider when selecting a hotel destination are:

- Location. Do you want to be close to your offices? Close to another site (client, corporate facility, airport)? Or would a trip to a resort work better?
- If attendees are required to stay at the meeting hotel, be sure to assess the number of hotel sleeping rooms required, including single and double rooms and suites (single and double refer to the number of people in each room). Also keep in mind the number of beds required for each hotel sleeping room. Remember, sleeping rooms may not be required for attendees living near the hotel.
- Estimate the number and sizes of function rooms required for meetings, coffee breaks, exhibitions and meals. **We offer an easy-to-use Space Calculator at www.crowneplaza.com/meetings.**
- Find out the number and types of restaurants within your possible hotel venues, along with available food and beverage services.
- Determine if golf, tennis or other recreational facilities are available at the hotel or if guest privileges are available at nearby facilities.



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Clarify the Budget

As you make preliminary inquiries, you will quickly see whether the arrangements you have in mind are feasible for your budget. This budget planner will help you keep track of potential costs. Complete this form or make copies for each day of your meeting. Then total the daily costs to determine the total estimated cost of your event. **We offer an easy-to-use Budget Calculator at www.crowneplaza.com/meetings.**

Rooms		NUMBER	RATE	TOTAL
Sleeping Rooms	Singles	_____	_____	_____
	Doubles	_____	_____	_____
	Suites	_____	_____	_____
	Hospitality Suites	_____	_____	_____
			Total	_____
Meeting Rooms		_____	_____	_____
			Total	_____
Food and Beverage				
Breakfast		_____	_____	_____
Lunch		_____	_____	_____
Dinner		_____	_____	_____
AM Break		_____	_____	_____
PM Break		_____	_____	_____
Reception		_____	_____	_____
Cocktail Party		_____	_____	_____
Hospitality Suite		_____	_____	_____
			Total	_____
Technology/Audio-Visual Rentals				
Equipment	_____	_____	_____	_____
	_____	_____	_____	_____
			Total	_____
Travel and Transportation				
Air/Ground	_____	_____	_____	_____
	_____	_____	_____	_____
			Total	_____
Other Rentals & Professional Services				
Signage		_____	_____	_____
Other Promotional		_____	_____	_____
Invitations		_____	_____	_____
Gifts		_____	_____	_____
Awards		_____	_____	_____
Decor		_____	_____	_____
Guest Speakers		_____	_____	_____
Photographer		_____	_____	_____
Entertainment/Music		_____	_____	_____
Security		_____	_____	_____
Offsite Activities		_____	_____	_____
Other		_____	_____	_____
			Total	_____
Grand Meeting and Event Total				_____
Total Cost Per Person (Grand Total/# of Attendees)				_____

Organize meeting notes and materials and review your timelines

Once you've established the framework of your meeting and know its general requirements, you're ready to contact hotels and discuss planning specifics. You'll find it helpful to set up an organizer with sections for the various planning steps, so you can keep all the meeting information in one place. Some suggested section titles include:

- Schedules
- Budget
- Contacts
- Rooming list
- Ground transportation
- Event communications
- Meeting room setups
- Audiovisual equipment
- Food and Beverage
- Recreation
- Speakers
- Entertainment
- Spouse programs
- VIPs

Timeline



These are general guidelines to keep in mind concerning what needs to be done and when. You may be on a tighter deadline, or have luxurious amounts of time (lucky!). Generally, you should start planning three months in advance, so your attendees can arrange their schedule and speakers can begin to prepare their presentations and you can relax a bit. Every program is different, so adapt this timeline as needed.

3 to 5 months out

- Determine the objective of your meeting
- Get your budget approved
- Check calendar of events taking place near your desired venue to avoid conflicts
- Book meeting site and necessary hotel rooms
- Speak to Meetings Director or Sales Manager about menus and meeting room needs
- Set up master account for meeting charges and determine who can sign for charges
- Invite speakers and provide scope of desired presentation
- Invite attendees
- Make travel arrangements
- Decide on any marketing needs; begin creative development

At least a month before event

- Confirm menus, room setups and supplies in writing with your Meetings Director
- Reach out to speakers to check on their presentations (they'll likely need urging)
- Inform hotel what time guests will arrive so front desk can be properly staffed
- Order gifts and amenities
- Order signs and printed materials
- Introduce any marketing materials into market
- Mail attendees the agenda and any brochures; suggest a dress code and times for arrival

3 weeks before meeting

Check in with speakers again; offer assistance with A/V and handouts
Reconfirm quantity of hotel rooms needed and reconfirm amenities

1 week before meeting

Ship materials to location so that they arrive AT LEAST 24 hours before your arrival
Confirm all outside equipment orders (like A/V)
Make arrangements for shipping materials back to your office after event
Finalize food and beverage counts for the first day of events
Finalize needs for outside tickets/entertainment sources
Take a master copy of all handouts and brochures; in a pinch, you can arrange to have them copied
Take a deep breath; you're almost there

Day before meeting

Review details with Meetings Director or Sales Manager
Inspect all shipped materials
Inspect signage and hotel message boards
Ensure rooms have proper amenities
Relax; everything will be great!

Meeting day(s)

Check all function spaces one hour before use
Notify Meetings Director immediately of any changes
Meet with Meetings Director every afternoon/evening to go over itemized costs for the day
Sign checks and keep ongoing record of expenses
Be available for attendees; be patient if they offer advice or criticism (it's been known to happen); thank them warmly for compliments



Wrap up

Sit down with Meetings Director to review all your sessions and your charges
Be sure to praise the performance of staff who have provided exceptional service
Consider circulating a survey to attendees or a feedback form to assess success of event and areas of improvement for next time. Pat yourself on the back: Nice job!