

# Chapter Leadership Summit Event Management Best Practices

GBTA Chapter Presidents Council  
November 20 – 22, 2013  
Tucson AZ

# Educational Sessions Descriptions

**Session Title:** Event Management

**Session Description:** Event Management Best Practices and industry tips

**Learning Objectives:** Participants should go away with the knowledge and tools they need to properly source, plan, negotiate and manage a success meeting or event

**Speakers:** Jessica Davis & Sean Parham

**Takeaways:** The full presentation will be provided to participants electronically post event. Additional resources will included a detailed meeting checklist, project form and site selection questionnaire, all provided electronically post event

# Event Management

## **Speakers**

### **Jessica Davis**

Travel Manager  
*Sempra Energy*

- Currently in process of creating a managed meeting program

Chapter President

*San Diego BTA*

Served on the Board since 2006

Vice President

*GBTA Chapter Presidents Council*

### **Sean Parham**

Director, Procurement & Sourcing –  
Travel Services

*Corinthian Colleges Inc.*

- Travel Services sources and plans 400+ meetings annually

Incoming President

*Los Angeles BTA*

Served on the board since 2007

# Event Management

## **Agenda**

- Best in class information on Event Management
- Negotiation tips and tricks
- Pre-Post meeting tips
- Open Discussion/Q&A

# Event Management

## **What makes an event a Success?**

- Content is King – Professional Development
- Goals, takeaways, meaningful to all
- Attendee involvement/interest
- Logistics
- Know your audience
- Time Management
- Location
- Communication – Social Media
- CSR
- What else???

# Event Management

## **General Checklist**

- Hotels Contacted
- Hotel Selected
- Contract Signed
- Room List
- Banquet Event Orders Complete
- Transportation
- Concessions
- Input Meeting on Calendar
- Register Meeting



# Event Management

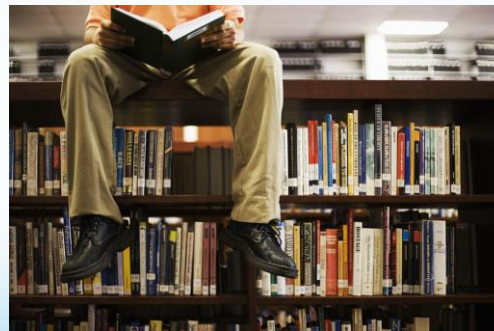
## **Brainstorming & Pre-Planning**

- Set realistic expectations from the get go
- Determine the objective of your event; this will determine the kind of venue that you need.
- Is there information that must be taken away or is it a chance to network and come together?
- Will the event WORK? Is the schedule realistic, are there any other similar events at the same time?
- How many people do you need to make it happen?
- Do you have the resources to make it work? Both monetarily and with man power?

# Event Management

## **Resources**

- Tap into your personal and business resources...
- Does your company have meeting or event space you can use a little or no cost?
- Does your company have points with a certain hotel chain that may be used? Are any of your committee members privy to event space.
- Don't forget to tap in to any Preferred Hotel Options from the Individual Business Travel side.
- Explore every avenue!!





# Event Management



## **Budget**

- Determine your budget before you send out any RFP's to any venues and hotels. This will determine what kind of venue you can afford. Remember to keep in mind what the air expenses are for the city you are considering.

## **Things to keep in mind:**

- Facility Rental Fees
- Food & Beverage Cost
- Food & Beverage minimum
- Publicity
- Speaker Fees/Honorariums
- Supplies
- Technical Support
- Travel
- Security
- Licenses or Permits
- Registration Fees
- Other

# Event Management

## **Event or Meeting Scope**

- Determine what sessions/speakers need to take place or what times band or entertainment will take place. Do you have a key note speaker, exhibitors or general sessions or breakouts?
- Make sure you take into consideration what the set up time for the entertainment. Some set-ups take the full day prior to the event.

# Event Management

## **Request for Proposals**

- Send to any venues, boutique hotels or chains in the area you may be considering. Use NSO's (national sales organizations) that can send to their entire chain and help you determine a city that will most suit your budget
- Third party meeting and event planners can also be of assistance at times

## **Permits**

- You may require the following: food permit, outdoor space permit, alcohol permit, sound permit, sanitation permit, sales, fundraising permit, film license (if needed)

# Event Management

## **Site Selection (Detailed Checklist will be sent out)**

- Know your audience, will it be mostly men, women, a combo?
- Parking, is self parking an option or valet only?
- For multi-day events, how easy is it to get from the meeting space to their rooms, are there elevator delays?
- Confirm if any construction will be happening at the location
- Natural Lighting, view?



# Event Management

## **Audio Visual Needs**

- Determine your AV needs. Do you own any LCD's you can use? Beware of patch fees from venue if you do not use their in-house vendor. Ask for 10-20% off the AV prices

## **Transportation**

- Transporting attendees from one location to another can require additional transportation services including Motor coaches, Shuttles, Limo, Sedan, etc.
- Check your references and insure they are properly certified/bonded/licensed, etc.

# Event Management

## **Entertainment/Speakers**

- Determine who you want your entertainment to be. Don't be afraid to negotiate the fee. Keep in mind entertainers will have riders that could cost you additional money (i.e.: food and beverage items, travel, etc.)
- Define travel expenses, is it included in their fee or will they bill you after the event?



# Event Management

## Negotiations

- Don't be afraid to **negotiate**, You may fill a need time at a venue!
- *Negotiate your food and beverage minimum*, ask for current prices and to honor the current years price if event is not until next year.
- *Upgrades* – ask for a certain amount of standard rooms to be upgraded to suites
- Welcome amenities for VIP's
- *Cancellation clause* – ask for a rebooking or cancellation clause in the event your event cancels. If the hotel can resell the space, you may get your money back, if not, ask for a rebooking of event within a year or 6 months

# Event Management

## **Negotiations Cont...**

- *Walk Clauses and Name Change Clauses* – Confirm Walking guests is not an option, insure guest name changes are allowed.
- *Function space* – ask that no function space be changed without your written consent
- *Over performance clause* – ask for 1-3% credit to the master should you outperform your food and beverage guarantees
- *Group Rate Guarantee* – No lower promotional rates should be in effect during your conference and they must honor 3 days pre and post rates if availability
- *Mutual Indemnification Clause* – Most contracts are one sided, work on 2 sided



# Event Management

## **Negotiations Cont...**

- *Service or Resort Fee* – Ask that the service fee be included in the contract prior to signature, Ask that the resort fee be waived for your guests in your room block.
- *Rooming List/Reservation Cut-off* – standard is 21 days, ask for 14 days in advance. Rooms must be guaranteed for late arrivals
- *Noise abatement* – make sure no other nearby groups will interfere with your event
- *Renovation/Construction Activity* – if hotel or venue is doing construction that it will not affect your event
- *Attrition on F&B and Room Blocks* – Look to lower what you're liable for.

# Event Management

## **Negotiations Cont...**

- *Free internet access* – Hotels can often comp internet in guest rooms and common areas, but meeting space may be third party so you probably won't get a comp but the pricing is negotiable.
- *Complimentary* writing pads, water service, pencils/pens, candies/mints will be placed on all place settings
- *Parking* – a discount on valet and self parking. Ask for a certain amount of free parking passes
- *Force Majeure & Terrorism Clause* – Ability to cancel within a certain time period of an act of terrorism within 50 mile radius.



# Event Management

## **One week prior**

- Call all vendors and make sure everyone is scheduled for the correct time.
- Ask vendors to put together production schedules so you can manage set up correctly.
- Make sure all permits have been signed and are ready to pick up
- Food guarantee due to caterer 72 hours out from event

# Event Management

## *Post Event*



# Event Management

## **Post Event**

- Gather the key individuals who helped with the event and have a wrap up meeting to discuss your successes, issues, what worked, what didn't work, etc.
- Review any project forms, event matrix, etc. to make sure all function information is included for use toward a future meeting or repeat events
- Send out a survey to attendees for feedback on their experience, what worked, didn't work, did you meet your goals, etc.
- Send out any post meeting materials to attendees
- Breath, it's over!



# Event Management

## **Resources**

- GBTA Hub (you will have to login to access the following links)
  - Direct Link to the SMM Resources provided by GBTA
    - [http://hub.gbta.org/resources2/list?order=DESC&sortby=resource\\_date\\_desc&category=298&keyword=&type=0](http://hub.gbta.org/resources2/list?order=DESC&sortby=resource_date_desc&category=298&keyword=&type=0)

# What's your Success Story?!

- What were some of your most successful event(s) and why?
- What are some unique event concepts you have had in the past? Where they a success?
- Or let us know about an event that may not have been a big success yet you learned from it in the end.
- How have you applied negotiations to your chapter meetings?

# Thank you!

A copy of this presentation will be emailed to each of the attendee within 14 days following the Leadership Summit.

**Jessica Davis, GTP** | *President*

**San Diego Business Travel Association**

Vice President

**GBTA – Chapter President's Council**