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The ISMP Guide to
Planning Global Meetings



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Issues of Today

Planning: we all know its importance, yet can we better apply training to ensure the success of a meeting?

To guarantee success, harness technology to achieve meticulous planning. Create your own formulation of a planning document, which becomes your own blueprint to be employed time and again, in all your future planning. This methodology offers step-by-step checks, which over time, become automatic in the order of planning you need.



Involve all decision makers and support teams in regular updates to inform them of the progress of the meeting-planning documentation, based on a timetable of due dates, to meet internal deadlines as well as external deadlines such as hotel closeout dates. This document could be indexed as separate chapters including the following:

Brief: capturing venue, destination, meeting needs, profile and number of delegates, elementary components, preferred dates and budget, as well as historical data such as previous destinations and feedback and programs.

The client or decision maker whose core professional role is probably not a specialist meeting planner should endorse this document so that the planning and logistics teams, including the financial department, will be best prepared to adhere to the planning schedule, in particular the deadline dates and budget.

Select Partners: depending on the complexity of the setup, program content, activity and travel involvement, you may need the following: business travel agent, specialist conference planning agency or venue finder, production company or speakers, to name a few.

If your company does not have these specialists in place, research by recommendation and remember memberships of an organization such as the International Society of Meeting Planners may provide a wealth of knowledge in putting you in touch with useful partners.

Venue Details: once selected, should be logged in your planning document with terms and conditions, especially due dates, cancellation clauses and contract details. For your reporting line, prepare these details in short form. Your backup document should marry your venue details to your internal delegates' uptake and accountability issues.

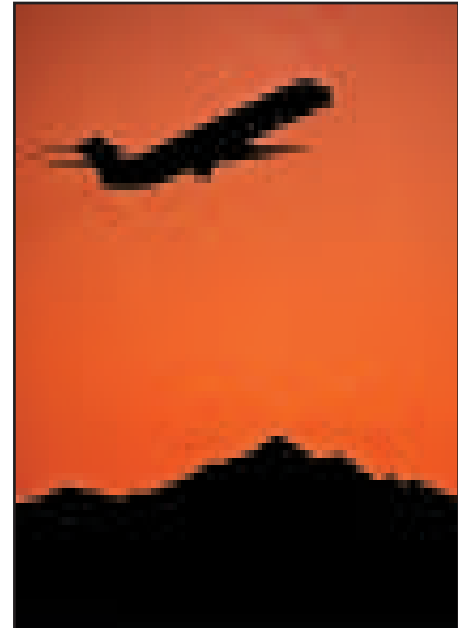
Meeting Components: this area of planning should draw together your brief, to the documentation you send to the venue and any third party involved in the meeting planning, such as a production company or technical team.

Delegates: whether you recruit delegates using a website, which may bring its own problems in gaining accurate and timely responses (allow plenty of time for chasing details) or bring together divisional participants

you will need to keep accurate information on delegates. This area can vary substantially whether we are discussing a congress or a management meeting. However, the information you gather will be needed at any stage by airlines, agents, hotels or DMCs. There are variations, depending where participants are travelling to or from, and the best way to capture this information is by using spreadsheets to store information. Details to include are name details/ passport information, travel arrangements, team for main sessions and activities, choice of meetings, hotel and room allotment, health and visa details, dietary and other special needs whether medical or otherwise, and companion details.

Yes, this spreadsheet can reach around the block by the time it is compiled but think of the ease of finding and sorting event information if it is all stored together. Remember that this information will travel with you. Bring hardcopies as well as a laptop for instant reference and access. Your planning document will also carry contact points by telephone, fax, cell phone, and email for all those people who will be enabling your success whether the top executive or catering manager.

No meeting is complete without accurate delegate feedback. Prepare and distribute a single sheet, enabling feedback regarding the format and content of the meeting. This information should invoke comments regarding the destination and extra components of the meeting. With accurate feedback gleaned from a swift to answer tick sheet, you will be able to plan the next meeting accurately, and you will have your planning documentation in place for the next one.



ISSUES OF TODAY GOVERNING DESTINATION CHOICE

Accessibility

With a strong and sustained growth in global meetings, the favorite destinations in Europe and beyond are selling first. This is because of direct/ multi-departure air access advantages, combined with choice of hotels and venues, which are either new or recently updated. In planning, the organizer should bear in mind the feel-good factor of a group/ meeting in reaching a “hot destination,” yet the clever organizer must realize that this choice is normally “at a price.”

What are the criteria you seek to achieve? Hot destination versus secondary location, which will save overall costs on air and accommodation. These savings could then be put to good use in the content of the program, allowing for better-quality hotels, events, meeting setup and special items such as collateral and entertainment.

Hot destinations today include London, Paris, Dublin, Frankfurt, Berlin, Barcelona, Marbella, Prague, Dubai, South Africa and various cities in the United States.

As a planner, you may find difficulties in space availability both for airline seats and hotels; hence negotiation/ price value may not be competitive. If this is a must destination, you should see if you could possibly take your meeting off-season or on the weekend. This may provide you with the best of both worlds: the popular destination and the right price.

What governs destination choice?

It may be delegate locations, i.e. the emerging markets of the former Eastern Bloc countries has helped Prague come to destination prominence. It may be dictated by rotation, as in the chair of an organization hosting the meeting in their own country. Destinations enjoy a fashionable phase often in cycles. We used to say three years high; three years low, though changes in carrier access as well as new and improved venues and products or infrastructure have somewhat changed this former actuality.

New Destinations

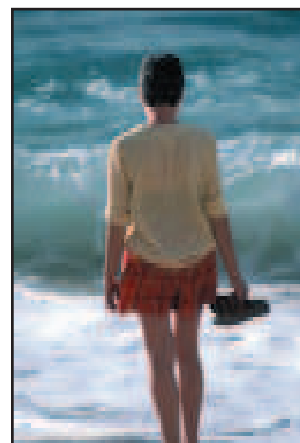
The search for new destinations is governed by shortage of space for large or last minute planning, as well as new destinations where regular delegates favor the new. New destinations are often priced right, Second cities are finding favor when capital cities are full. Once tried, they become a popular choice when price, product, service and accessibility can deliver. Lastly, exchange rates can play a very important role. Some areas close by are less popular due to often-indirect access by air. This particularly applies to the Greek major islands. However, with an improved infrastructure to airports and domestic carriers, the smart money should be on this destination where there are fabulous and right-price hotels, resorts and new conference centers.

Safe Destinations

Weigh carefully the risk factor of using areas of political or social unrest or recent extreme weather conditions. Remember if global delegates are attending, there may be visa needs and in some cases, no visa possibilities. Consider the health risk factor also. Seek advice available on the Internet from the Foreign and Commonwealth office and follow it. Consult your insurer. Having done those things, remember that you may be able to negotiate the bargain of the century when a meeting can go to Turkey, Egypt or Croatia.

Low-Cost Carriers

Now, especially on European routes, the low-cost carriers offer a low cost alternative, as well as choice and a greater number of seats to reach a destination. In can enable a regional direct dimension. They are especially egates may be funding their own flights or when a group has a Agents who shunned their use a few years ago are now able rather than a commission in many cases and are often refer- their clients are demanding their use.



some cases, they useful when del- limited budget. to work for a fee ring to the fact

Hotel versus Convention Center

There has, in the past, been a tendency to prefer to both the accommodation and the meeting. However, with a ties where bed space can match meeting space numbers, more ing the virtue of staging and production and the need for addi- such as built-in translation booths in several languages and the of technicians, plus equipment. Also, hotels often have space it comes to requirements such as breakout rooms, a requirement that seems to be on the increase. Consider- ation should also be given to a change of environment. The efficient planner should entertain flexibility of choice.

use a hotel for few large proper- buyers are realiz- tional equipment ready availability restrictions when

Last Minute Planning

Let others assist (regional and national tourist boards, DMCs, regional sales offices and representative companies). They are often able to find space last minute. Don't worry if you ask twice. In fact, a hotel may have an unexpected cancellation or fall short on numbers. Ask your contact in a hotel if they know of any other hotel that could assist. You should not pre-condition too much in the terms. Be flexible.

Respect contractual dates and terms and conditions

With many destinations, there is no lack of clients. Don't think you can delay a stage payment. For instance, you may be out of rooms/ seats with no come back or alternative especially in a busy period. Restrict the number of locations you hold and if a local office or external agent or DMC is involved, do not duplicate provisional bookings. You will lose credibility or space.



Limit the choice of destination

The more choices you source, the more time you are taking, the less time you have for content planning. The more choice the client has, the more difficulty the decision. Some leading agencies offer a wider choice of destinations in their most simple form. Some major agencies are saying that three destinations at the maximum should be offered.

Time is money. Encourage all decision-makers to reduce the needless choices.

Websites

Websites are a boon to planners offering ready information and the opportunity to prepare and enhanced presentation, thanks to ready information/ images downloaded in minutes.

Insurance

Insurance is needed to insure the meeting itself, goods, the delegates and contingencies.

Tax implications

Beware when incentivized elements are brought into the meeting. Tax implications will vary from country to country.

Familiarization and Site Inspection Trips

The former is readily available throughout the industry, but is open to abuse. Be sure that there is a ready itinerary, which suits your planning purposes prior to acceptance. Noting that most suppliers will balance the working element of the site visits with activities and culture computed to show you as much of the destination at a steady pace in the time allowed. We would attempt to offer short haul options of one or two night stays and include, where possible, at least one weekend night. Avoid accepting hospitality you are unlikely to return with business. Suppliers will know when their services are being abused. With ready information at every step of every destination, where is no validity that a planner needs to visit a destination before using it. There should however be a costed item in the budget for you and the decision-maker to visit the destination and to meet with all destination suppliers prior to final acceptances. Most suppliers will refund at least 50% or any quoted cost when a specific piece of business matures.

Locations

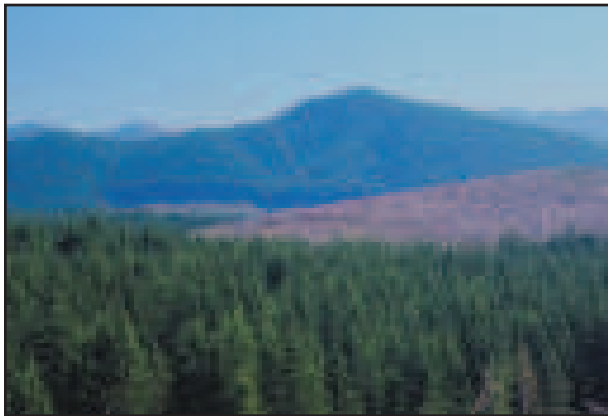
- Determine first where delegates are coming from and take into account ease of direct or near direct flight, rail and road access for the majority.
- Consider the cost factor of them getting there as this may determine attendance.
- Think of timing. Getting them in early or late out may save an overnight stay.
- Think of the other factors, such as time in travel and jet lag.
- Look at historical details if this is a repeat event.
- Think about the company's needs.
- Sponsors - your group may need sponsors. Do they have a preferred destination?

Type of Location

Take into account location needs against the program.

Capital City versus Second City

Choosing the second-choice city may save money, but will it still bring the numbers?



City versus Country Location

Privacy and lack of outside distractions may be benefits, however, will the service live up to city expectations?

City versus Resort

Consider whether the use of a resort may help or hinder the needs of the meeting. Might the associated activity lift spirits and assist team building, which is a reward? Or did the company have a bad year and therefore non-participants would deem use of a resort frivolous? Don't select a resort and then schedule an indoor program.

Do ensure that when you need to deliver a serious message that there are blackouts for all the sunshine, lapping waves and sounds of other people enjoying the outdoors.

Hotel versus Convention Center

Usually numbers and set up dictate this choice.

Residential Conference Centers or Seats of Learning

These are popular with training meetings, research, governmental or civil workers meetings. Budget may dictate.

Cruise Ship

Think of it as a resort when evaluating choices.

History

Is there a pattern of rotation?

Site visits or Study Tours

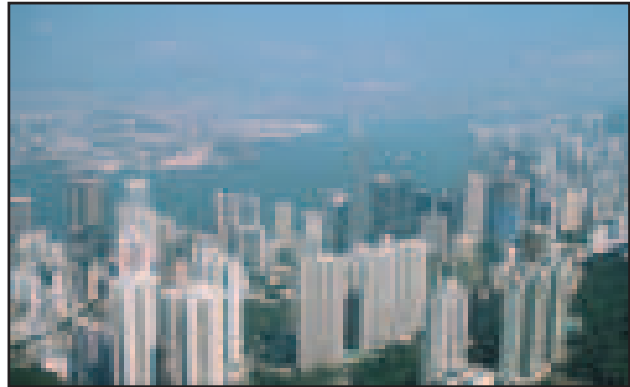
Visas Needed

Will it be an easy process for delegates to obtain travelling visas? What is the cost?

Selected Venue

Production needs: can you obtain a good professional local support company?

Do you use a specialist travel agency for all or part of the planning? Take their advice as to what works and where and what doesn't. Also weigh cost and time implications of travel routes and available carriers.



- ◆ Set up requirements
- ◆ Technical support
- ◆ Cost of technical needs and other related costs
- ◆ Is there a large enough room for breaks and receptions?
- ◆ Multi-interpretations, soundproofing, blackout, press room
- ◆ Controllable heat, light, air-conditioning within the meeting areas and function sites
- ◆ Banqueting facilities and proximity of kitchen
- ◆ Complimentary room policy and terms and conditions
- ◆ Separate check-in area (Signs/ Company logo)
- ◆ Shuttle buses
- ◆ Proximity to town, airport, metro, highway
- ◆ Organization - allocation of just one contact
- ◆ Office facilities, business bureau
- ◆ Clean and fresh-smelling, well-maintained rooms and bedrooms. In-room amenities: interactive TV, safes, computer/fax ports, telephones, working area, sitting room, number of single/double rooms.
- ◆ Suites for VIP use or as hospitality for discussion groups?
- ◆ Choice of recreational facilities: spa, leisure area, outdoor activities When are they available for use?

A site inspection is essential is a medium to large meeting is planned.

Climate

Most delegates in a dark northern winter jump at the chance to meet in winter sun or a warm climate. Be warned that the two are not the same.

Use outdoor venues where weather is expected to be good, but do make alternative contingencies, just in case the weather turns.

Advise your group on such useful information, as clothing needs. Most may prefer to meet in casual clothing or smart casual clothing at least, if indoors. If you want them in suits or in formal attire, tell them from the onset.



A different climate, particularly a hot one, may necessitate medical considerations. Water, food hygiene, vaccines, medications

Temperature considerations whether hot or cold, need to have immediate and individual climate control in venues, bedrooms, meeting rooms and buses, particularly when delegates are coming from a different climate than the one at the destination.

Political Unrest

In most cases, your own government's foreign office should be asked for advice on any considered potential trouble spot. Follow their advice.

By the nature of group business often booked a long way out, if you are at all concerned at the planning stage of unrest developing in the interim period, make contingency plans from the start. Be certain to check "get out" clauses on your contract. A weak selling destination, following unrest or major climatic upheaval may be ready to waive cancellation clauses in their contract.

Beware though of overreaction. In recent times, destinations that are far from trouble spots have suffered huge cancellations.

Check if there are any delegates with insurance concerns, which may cut down or exclude destination choice.

Delegates themselves may be travelling from trouble spots. Will it be easy for them to obtain a visa to your planned destination? This is an increasing concern for those from perceived economic migration areas.

Consult with a local member or office if at all possible.

Language

Regular travelers in today's global business world have no qualms about travelling where they may not be able to hold an animated conversation with the locals, but less frequent travelers and delegates may shy away from holding or attending a meeting in a country where they fear they may not be understood.

Ensure multi-interpretation is available when needed in meetings and those ground hostesses who possess language skills to converse with the delegates are on-hand. Obtain local maps and local interest literature in needed languages and ensure that all delegates are well briefed as to where they may seek help if needed.

Major hotel chain demand that their staff possess a wide range or languages.

The organizer may been a translator and interpreter for such things as high-tech discussions with the technical staff.

Otherwise, don't forget to plan for the extra time and budget you may need to allow delegates additional briefing literature and support staff.

Language should never deter a meeting going to a different, new and exciting location, but allow for the planning to ensure any unaccompanied outside excursion are routed to areas where their languages will be spoken.

If in doubt, polish the mime skills.



Airports and Airline Rates



It's a changing world in aviation terms today, with open skies policies, global partnerships all giving a variety of choices. Most usually we would advise all to ensure that they have a good skillful travel agent to guide the planner through the minefield of planning this oft-fraught subject.

Beware that in today's reduced commission rates to agents, you may be asked to pay a handling fee to agencies for their ticket issue. In this complex world of routes and fare bases, a good agent has not substitute and this is money very well spent.

Other useful contacts include the airline sales people or the airline's consolidator may be able to support your needs and offer sound advice.

Fares

For fares, always ensure several quotations are obtained. It is possible to negotiate multi-departure fares and have tickets negotiated in one place and issued in different global locations.

- ◆ Check if the delegates have any restrictions on their executives travelling together.
- ◆ Is there a preferred company supplier?
- ◆ What restrictions are there on classes of tickets according to delegate status?
- ◆ Consider ease of access from regional routes.
- ◆ Check timings – they may have a night's stay if delegates are unable to arrive early or leave late.

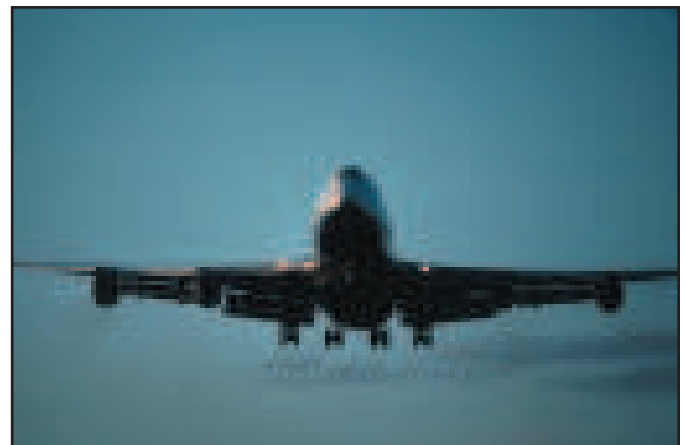
Direct versus Indirect Access

Often a right priced destination is overlooked due to the fact that there is not direct flight access. As most meetings involve global or at least regional participation, there is likelihood not all delegates may travel directly. Your considerations should involve three pertaining factors:

1 Direct option

2 Cost option

3 Ease of indirect route. Can you make a feature of an indirect route by use of hospitality at the gathering point or even a night's stay, which may involve a first day's meeting or incentivized portion.



Carrier Group Services

- ◆ Off site check-in facilities
- ◆ Logo styling/ headrests personalized
- ◆ Upgrades available
- ◆ Number of free tickets for site inspections
- ◆ Hostesses – assistance with transfers
- ◆ Cockpit visits
- ◆ Charter or scheduled flight (destination/ budget may necessitate this decision)
- ◆ Customs clearance waiver (more usual on charter routes to smaller airfields)
- ◆ According to group size, baggage allow ances may be negotiable
- ◆ Code share partners for ticketing issue may cut down sourcing time and issue timing
- ◆ Check details with airline group sales should you wish

Don't dismiss scheduled charter services. Sometimes this is the only access to some islands, and some of them are very good.

Don't forget that you need to confirm details and the group to hold the fare

Check how far the airport is from the center of the city of your venue

Hotels

- Seek price value/ added benefits
- Low rates? Ask why – poor access, location, service, management may all be significant in dictating rates
- Independent versus tried and tested chain? The former may better reflect the destination, check out the management and reputation
- Seek a hotel that will allocate one contact from initial inquiry to the final billing
- New properties – yes, if you are a seasoned planner or have worked with the management before
- Seasonality may dictate prices – ask for low season dates and rates for feasibility
- Ensure that the building can adequately meet your needs
- Afford the best if the budget will reach – it pays dividends in client appreciation
- Can you use an airport of convention hotel? This will also save cost wise.
- Need the hotel to reflect a subject matter or trading climate? Best not to book an exotic resort when a company is reducing manpower. On the other hand, if you need to reward winners or boost morale, use a resort!
- Consider also if outside attractions are easily reached – if not, attendance may be a problem
- Do not consider room prices or meeting costs, but the whole package you are offered
- Check out dietary needs, religious harmony, and if, for instance, the visiting country has local customs to observe (such as ladies covering up and behaving modestly or alcohol restrictions) be sure all decision makers and delegates know
- Budget overspent, as a result of the hotel quote offered, tell someone. They may have a solution.
- F&B – note when hotels offer wine per persons, it will never suffice. Allow at least half as much again.



Convention and Visitor Bureaus

- Check out those with free service to buyers
- Deal with the senior most person responsible for your market
- Ensure they know you want information pertaining exactly to your planned brief only
- What services may you expect from the bureau, its partners, city or destination?
- What is free or what VIP services are available
- Maps, information packs, dine around, things to do and see
- Support material, teasers, over-labelling, signs and pro-publicity covering the destination
- Red carpet treatment: a visit with the mayor, governor or other dignitary. Signing ceremony, cocktails with city elders, a reception hosted in the town hall with a local trade association member
- VIP attendance and speaker at the plenary session
- Police escort or traffic lights changed for your arrival cavalcades giving them right of way are very impressive



Talk to those who have had their events there and take recommendations. All convention bureaus have a list of former events. Ask for telephone numbers. Ensure the location can handle your group in terms of support, number and quality of hotels, available space, size of main venue and access points. A good DMC or PCO can make the difference.

New destination/venue? ONLY if you know the bureau chief or manager of the property well.

Crime/ Security

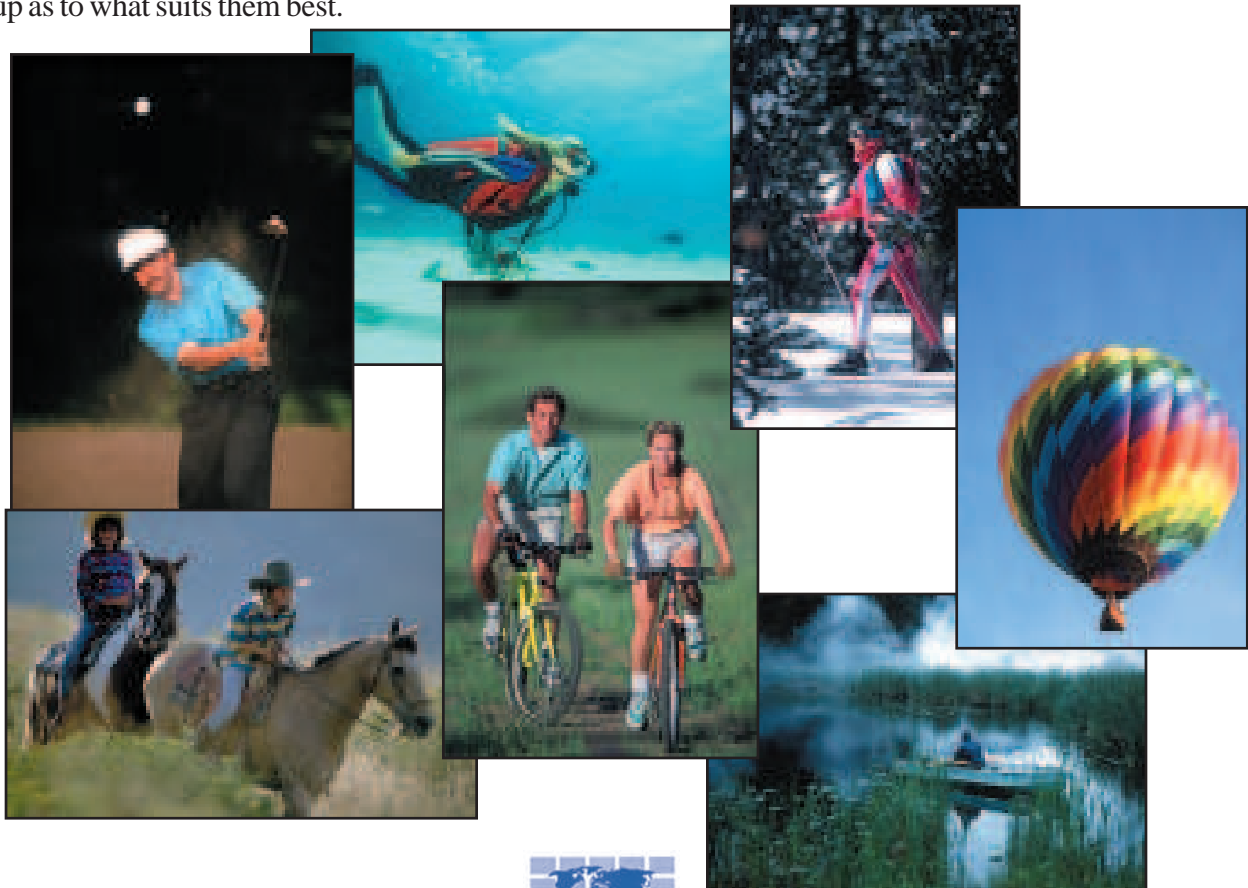
Most international travelers are well aware of their own needs for vigilance, but many relax when in a group environment.

- Brief security measures in the joining instructions, not only for perceived trouble spots.
- Ensure the delegates know their own safety is their responsibility, not yours.
- So do's: lock up valuables, including laptops, in the hotel safe
- Never leave valuables unattended, even in your locked hotel room
- Carry minimal cash at all times. Take credit/ charge cards or traveler's checks
- In trouble spots, dress modestly, do not show jewelry and do not wander alone

Extra-Curricular Activities

- Plan meticulous events either in house or at an external venue
- Pace out travel times, transfer and site inspect
- Take advice as to what works – don't assume that what works in one destination will work at an other
- Using local artists – check professional ism and reliability
- Ensure there are no hidden extras to costs quoted particularly for outside events
- Share your budget and expectations with local receptive, the better to make the most of your money
- Limited budget? Say so and make do with activities like treasure hunts, museum visits, local attractions that cost less. Also seek sponsorship for activities; arrange free time or low cost dining vouchers for assistance
- Generous budget? Buy the best outside activities your budget will allow
- Match activities to the interests and age groups of the delegates, not the planner. A common mistake is to fix skiing when few ski.
- Remember spouse program may include as many men as women
- A mixed bunch – select a menu of different activities for the choice of the delegates

In conclusion, many of the tips and pointers contained here are best suited to large groups. However, there is never any harm in asking, and many don't ask enough for fear of being though not to have the experience to operate. Ask, listen and learn. Take advice and suggestions from all you meet. Look back at the history of the group as to what suits them best.





International Society of
Meeting Planners