

The Conference Organiser's Guide

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Preface

The consultants at Key Conference Solutions have long seen the need for a concise meeting planner's guide to planning and preparing for a conference.

Our consultants are industry specialists with over 81 years of combined, hands on experience in venue management, food and beverage operations, corporate hotel sales, along with a meeting and conference planning background.

They use their knowledge and experience to recommend the right venue, at the right cost for your business event.

Who are Key Conference Solutions?

Key Conference Solutions are a venue selection and conference-planning organisation, providing an efficient and cost effective solution to the challenges of meeting and conference planning.

A one-stop solution to source the right venue according to your specific requirements, throughout Australia, New Zealand, Asia, Europe and the USA.

**To find out more about Key Conference Solutions visit
www.keyconference.com.au or call us on +613 9870 4611**

Introduction

You've got the job of organising the conference. Whether it's your first time, or a regular part of your every day workload you have to get it right.

This resource guide is designed to assist you in making sure that your next conference achieves the planned outcome. In particular where to start in planning a successful business event, right through to the debrief and review process after it's all over.

The same principles apply, whether it's a conference for 4000, 400 or 40. Achieving the best result with the least amount of stress requires working to a plan and sharing the important decision milestones with all the stakeholders as you move along.

Building the right plan for your conference is the core element in achieving a successful outcome. The key elements will be:

- ◆ Setting clear goals and objectives for the conference
- ◆ Venue selection
- ◆ Budgeting
- ◆ Managing the conference
- ◆ Financial management and your conference budget
- ◆ Review and feedback

The aim of this handbook is to guide you through the planning process, ensuring your conference runs smoothly, and that the presenters and delegates are able to work in the right environment to meet your objectives.

Understanding the purpose of the conference

Start by asking do you really need to meet? Do you really need a conference?

Determining the purpose of your conference and writing clear goals and/or measurable objectives is the first step in planning the conference.

Even if you were not in on the decision to hold a conference you need to satisfy yourself that a conference or meeting is required and that you clearly understand the objectives.

To determine the purpose and set objectives it will be helpful to understand the various conference types.

Corporate Retreat/Strategic Development ● Particularly important for new initiatives, reviews, internal announcements of complex senior management issues. Very interactive, often continuous with meal breaks taken in conference room, private dining, security, may prefer sole use venue. ● *Objective: To create future plans for the organisation.*

Training ● Training events are generally educational and allow attendees to interact with people from different parts of the organisation. Meeting intensive, evening sessions, lots of overheads, flipcharts and PowerPoint presentations, little free time, usually use an external facilitator. ● *Objective: To improve specific skills through learning.*

Sales/Product ● Meeting to communicate with the sales force - setting sales goals, announcing new product lines. Can be used to focus on individual goals in terms of wider corporate goals. Often use team building activities, multi image AV, lots of displays, special dinner. ● *Objective: To work on sales plans and team motivation.*

Association ● Annual meeting/conference focusing on past performance and future direction. Enables members from different parts of the country to interact and put forward their views. Exhibit orientated with lots of discussion groups. Special dinner usually themed with presentation of Industry Awards. ● *Objective: To review activities and gain agreement on future plans.*

Incentive ● Reward driven event recognising excellence in performance. Venue chosen will often be in different, unusual or exotic destination with heavy use of recreational activities on and offsite. Usually a light meeting schedule planned. ● *Objective: To reward staff for their achievements.*

Each business event will have its own specific main objective as well as secondary objectives. When you have responsibility of putting together an event you need to know the objectives. If you have not been given that information or it is not forthcoming, make some educated assumptions then ask for clarification.

Having the conference objectives documented and clearly understood is the platform on which all your planning decisions will be based.

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CHECKLIST

- ☛ Clarify reason for conference
- ☛ Clarify type of conference
- ☛ Understand main objectives
- ☛ Document objectives

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Venue selection

Once you have the objectives clearly established, you need to find a venue. The right venue. Do not take it for granted the dates you want will be available.

A good place to start is the preferred dates; flexibility by even a day or a week may be beneficial in negotiating with venues. A personal inspection of your proposed venue will enable you to assess how appropriate the venue will be for your group. Before you even consider taking the time out to undertake a venue property inspection, you need to be confident it is going to be appropriate for your group and your requirements.

As well as referring to your conference objectives and budget, you should also consider the attendee profiles- age, gender, level within company. You will need to allow for program design, meeting format, social and recreational needs, previous conference history and internal organisational policies, along with how your attendees are getting to and from the venue.

If using external facilitators, you will need to consider their preference for the style, location and conference space facilities. Conference venues come in many shapes, sizes and locations.

Venue Considerations

STYLE

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Specialist Conference Centre

Resort

Motel

Hotel

Star Level

LOCATION

.....

CBD

Metropolitan

Regional

By the sea

In the snow

Interstate

Overseas

Access to airport

Commute distance / time for guest speakers

Once you have your venue criteria firmly set, you can then start matching venues to your needs. For the novice this is the hard bit.

One option available to you is to place the venue finding role in the hands of a venue finding service or PCO (Professional Conference Organiser). They receive their income from the venue on business placed, and can therefore provide this service to you at no cost. If you prefer to go it alone much information can be gleaned from:

- ◆ Business telephone directories
- ◆ Regional meeting and conference bureaus
- ◆ Hotel chains
- ◆ Trade directories
- ◆ The web
- ◆ Your own work colleague's referrals

Short-Listing Venues

Remember the more venues you contact, the more times you have to go over your needs, receive and interpret their proposals and deal with the follow up sales call from venues. The range of service, help and assistance you receive will vary greatly. Matching delegate profiles, conference objectives and your budget to your short listed venues requires sensitivity and careful judgement. The venue with the most suitable facilities will not be the right one, if the service levels and staff attitudes are inadequate. You need to go and see the venues first hand. Before you go, you should have made a general assessment of each venue on your shortlist.

General Assessment

Here are some of the questions you may ask.

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Q. Name three comparable groups that have recently met at the venue

Q. Are all the bedrooms required on-site?

Q. Are all meals and refreshment breaks included?

Q. Is private dining available?

Q. How many meeting rooms are available to the group?

Q. Are they soundproof? Do they have any pillars that obstruct views?

Q. What equipment is provided as standard?

Q. How long has the General Manager been at the property?

Q. Are there any other groups on the property at the same time? Who are they?

Q. What type of security is provided?

Q. Parking space available? Parking costs?

Q. What is the policy on varying numbers of attendees?

Q. What are the trading terms and conditions including cancellation policy?

Q. Room rates?

Q. Complete Meeting Package (CMP) rates?

Venue Inspection

There is no substitute for conducting an in person, thorough site inspection of your short listed venues before making a commitment. It's a good idea to take the decision -maker on the site inspection. Even if you have out sourced the venue selection process, a site inspection is invaluable.

During your visit there will be questions and observations you will need to make:

Conference Room

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- ◆ Audiovisual equipment included? Condition?
- ◆ Is there a preferred supplier of A/V equipment?
- ◆ Is the conference room soundproof?
- ◆ Is the conference room free from pillars, low hanging lights (that obstruct views)?
- ◆ Will the chairs in the conference room be comfortable for delegates over long periods? Are they ergonomic?
- ◆ Is the room secured when not in use?
- ◆ Are there individual lighting controls for the various presentation styles?
- ◆ Are there individual climate controls for the room? Eg airconditioning for summer, heating for winter.
- ◆ Is there good natural light?
- ◆ Does the conference room have Internet access? How many are available?
- ◆ Is there a separate business centre?
- ◆ How many breakout rooms are there? How far away are they from the main conference room?

- ◆ How far are the amenities from the conference room?
- ◆ Is external access close by?
- ◆ What are the access times to the conference room?

Location

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- ◆ Travel time from airport?
- ◆ Travel time from CBD?
- ◆ Travel time from your office?

Recreational Facilities

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- ◆ Recreational activities? Variety and in good condition?

Accommodation

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- ◆ Are there individual climate controls? Eg air-conditioning for summer, heating for winter.
- ◆ What facilities are in the guest rooms? Eg iron & board, hairdryers, TV's, mini bars, tea & coffee making.
- ◆ Does the room have Internet access? What sort of connection?

Food & Beverage

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- ◆ Attitude of staff?
- ◆ In what area will the meals be served? How does it present?
- ◆ What is the comparison between properties on food and beverage variety?
- ◆ To what extent are special dietary requirements met?

General

- ◆ How promptly are request dealt with? How flexible is the venue in meeting unusual requirements?
- ◆ What options are available that makes the venue stand out from others?
- ◆ Is the venue information available online?
- ◆ Are there past testimonials that you can refer to?
- ◆ What industry awards has the venue achieved?
- ◆ What relevant affiliations/memberships does the venue hold?
- ◆ What quality accreditation or certification does the venue have?
- ◆ Physical condition and presentation?
- ◆ Safe for attendees to walk around, especially at night?
- ◆ Hours of reception?
- ◆ Services available after hours?
- ◆ Mobile phone reception?
- ◆ How many public phones and house phones?
- ◆ Is the venue staff trained in first aid?
- ◆ What other groups will be in house during your conference?
- ◆ What are the OH&S procedures in case of fire?
- ◆ What is the disabled access?
- ◆ What security service is provided by the venue?
- ◆ How clean and well kept are the public areas?
- ◆ How is the overall presentation of the venue? Gardens, pathways and car park.
- ◆ Where are the photocopying, reception and business centre in relation to the conference room?

Now that you have personally been to your short-listed venues and compared their facilities and services in relation to your conference objectives and budget, it's decision time. Normally, the venue chooses itself on the way it meets your conference objectives and the individual criteria of the particular conference and the delegate profile.

You may need to adjust your budget to obtain the most conducive environment to achieve your goals. Like all things, venues vary significantly on quality, style, expertise and value.

If you have any doubts about the venue's ability to deliver, check with previous users.

For more help with venue selection phone

Key Conference Solutions on +613 9870 4611

or visit www.keyconference.com.au

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VENUE SELECTION CHECKLIST

- ☛ Establish dates for conference
- ☛ Decide the likely location
- ☛ Define venue style
- ☛ Generate a short list of venues
- ☛ Assess costs and standards
- ☛ Generate a short list of venues
- ☛ Conduct venue site inspection
- ☛ Communicate venue recommendation
- ☛ Commit to venue

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Financial planning

One of the first considerations is to determine if the conference is intended to make a profit, break even or lose money. Some may be paid entirely by the company because of its importance as a benefit to attendees. It is essential to have financial control over the event and build a working budget. Most meetings today are corporate conferences fully funded by the organisation. They cover training, management, strategic planning, sales and product launches.

When given the task and a budget for organising a conference you need to clarify exactly what the budget is required to cover. Many times people are off organising the venue for a 4-day residential conference and subsequently find that the budget they were working to included the external facilitators fee and travel costs from overseas.

It is also important to ensure that when you are comparing quotes and proposals from venues or other suppliers, you are comparing like with like. For example, some do not include dinner in residential meeting packages while others do.

BUDGET CHECKLIST

- ☛ List all conference costs
 - ☛ Allow for a reasonable cost variance as a contingency
 - ☛ Project your revenue (if appropriate)
 - ☛ Review all components as you go
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A CMP (Complete Meeting Package) rate usually refers to all charges per person, per 24 hours, excluding consumable items such as telephone, fax and beverages. Make sure all meals are included in this rate. There is nothing worse than finding out dinner for your group is extra.

Conference management

Conference Room Set ups

There are many different ways to set up a conference room, depending upon the space available, the number of delegates and the need to create a specific feel.

Delegate and speaker communication also needs to be considered. Not all in the industry use the same terminology but here are the most common room set-ups.

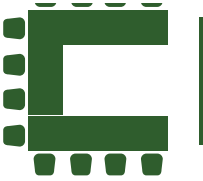
U-Shape • Very popular set up for groups of less than 50 where close interaction will occur. Gives participants the sense they are all equal in status at the meeting. Good visual access to front for visual presentations. A variation is the double U (a U within a U) or with seating on the inside of a single U. These variations can increase seating by up to 40%.

Boardroom • Ideal for small groups where close interaction and a lot of discussion are expected. Participants can see and hear each other easily. Sharing one table also creates unity within the group. Some participants will need to move when visual presentation is made. Most effective with groups of less than 20.

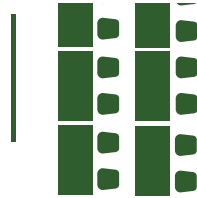
Clusters • Round tables seating 6 to 10 people are good for small group discussions and projects. Allows maximum participation within groups. Allows breakout and small group work without participants leaving the room or rearranging furniture. Ideal for groups of 60 to 100.



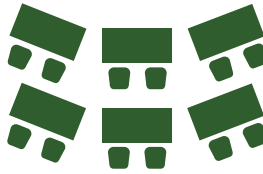
THEATRE



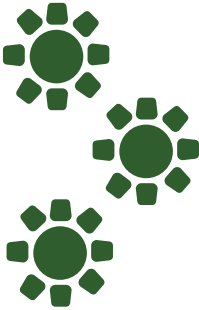
U-SHAPE



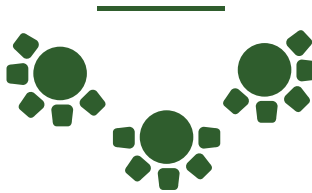
CLASSROOM



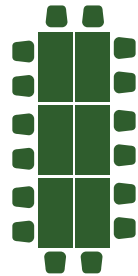
CHEVRON CLASSROOM



CLUSTER



CABARET



BOARDROOM

Classroom ● This traditional layout does allow many people to fit comfortably into a room. It is a well-used set up and is effective for one-way communication. The classroom style set up provides a work surface for note taking and for reference materials. Best for larger groups.

Chevron Classroom ● This style is similar to the classroom set up but with the table angled towards the front, placing each position on each row the same distance from the presenter. A variation on this style eliminates the centre aisle.

Theatre ● Just like going to the theatre, ideal for large numbers. One-way communication occurs with this set up and is ideal for audiovisual presentations and lecture style programs. Sound amplification may be needed in larger rooms.

Cabaret ● A variation of the Clusters configuration. Round tables seating 4 to 6 people with the chairs arranged in a horseshoe effect around each table. Ideal for small group discussions and projects while still allowing everyone to focus on the speaker at the front of the room and any audiovisual presentations. Ideal for groups of 60 to 100.

Different room set ups can make a significant difference to the numbers you can accommodate comfortably in a given space. (Be aware of floor plans that are not to scale in promotional material if space is critical.) Things like pillars, balconies and entry points can reduce conference space and affect sight lines for delegates. Where you choose to set up your equipment, screen size and modem point location is also a consideration. Ensure during your venue inspection that you can fit your preferred set up in the conference rooms on your venue short list.

Accommodation

Although hotels, conference centres, guest houses and motels can all have different names used in house for their rooms, the typical industry standard descriptions are: -

Single Room ● A room for single occupancy with one bed, normally a double.

Double Room ● A room for two occupants sleeping in the same bed.

Twin Room ● A room for two occupants sleeping in separate beds.

En Suite ● A bedroom with adjacent bathroom, usually including toilet, vanity and shower.

Executive ● Large double or twin room, sometimes with a work desk or sitting area.

Suite ● An accommodation room with a separate living/lounge area.

Most venues in Australia offer non-smoking floors or rooms.

Rooming List

Having agreed upon your requirements, upon confirming your booking, you will need to provide the venue with an alphabetical rooming list by delegate surname, with specific requirements noted (single, twin share). Include any information regarding special requirements for individuals attending the conference, eg the

need for disabled facilities, special dietary requirements, VIP delegates and the like. This will enable the venue to allocate bedrooms to your delegates. If any delegates are arriving at times that differ from the rest of the conference group provide the venue with contact and arrival details.

Always keep in mind that until the previous occupant of the room has vacated and the staff has had time to service the room, your delegate will not be able to check into their bedroom.

Be very clear in your instructions to delegates about bedroom check in time as opposed to conference registration and conference start time. Where delegates are arriving for a residential conference with registration at 8.30am, and a conference start of 9.00am, their accommodation may not be available until lunchtime or later.

Be very clear in providing information regarding the conference. Ascertain the venues accommodation check-in and checkout times. You will need a copy of the completed rooming list from the venue for your on-site organiser and management team back at the office.

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- CHECKLIST**
- ☛ Ensure you are aware of the different room types
 - ☛ Confirm your delegate rooming list
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Food and Beverage

Keep it simple and set the rules. A hungry delegate is irritable and inattentive. An overfed delegate is inattentive and sleepy. Leave it to the experts. Most quality venues today understand the balance required from all meals, breakfast, morning tea, lunch and afternoon tea. You are most likely to be offered a choice of menu

for dinner. Speak with venue staff in terms of quality, variety and time frames.

If you are pressed for time, a 3 course a la carte dinner may take too long.

Likewise should you have a speaker for the evening, schedule this into your dinner program with the venue.

Food is a very personal thing. It is a conference organiser's job to obtain a balance between creating an exciting menu and being able to have the venue deliver it at the right temperature to all your delegates, at the same standard, within the agreed timelines. Take advice from the professionals, the chefs and the food and beverage staff at the venue. Ensure special dietary needs are fully catered for. Compare the advice you get from your short listed venues as you do your sight inspections.

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BUDGET CHECKLIST

- ☛ Choose menus that can be delivered
- ☛ Establish a beverage policy
- ☛ Make the venue aware of special dietary requirements
- ☛ Provide a programme of the evening if other activities are to be included
- ☛ Make sure the venue knows who can authorise extra drinks

With regard to refreshments the venue should be clear on your beverage needs and policy, especially alcohol, before the delegates arrive. Who is paying for what and when? Who is the person on-site who can vary the rules? If it's in your budget you need to have control over the outcome.

The food and beverage aspects of your conference are an essential component of its success. Ask the venue for advice, choose wisely and work to your budget.

Debrief and Review

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You need to find out what elements were successful and what areas need improvement. The people to ask are your conference presenters and the delegates. Remember, rarely will you be able to please all the delegates, all of the time and the feedback will help you for next time. You have some choices on when and how you get the feedback, either at the conference or after the event.

You can have a pre-printed questionnaire, which delegates can complete at the end of each session (if having many different presenters), or at the end of the conference. You need to address issues such as speaker style, content and relativity along with venue comfort, conference service, food and beverage. Any venue issues need to be addressed with the venue. A debrief session involving both sides, that is guest speakers or presenters and your company, saying what went well and what did not, is a great way to forge clearer understandings of needs and expectations.

Below is a sample of some of the questions you may like to include in your questionnaire:

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- ◆ Did you enjoy the food during the conference? Consider quality, size of portions, special dietary requests and appropriateness of the food for your group.
- ◆ Please comment on the conference room. Consider the room set-up, lighting, climate control, servicing during breaks, cleanliness and equipment.
- ◆ Did the accommodation meet your expectations? Please comment
- ◆ Please comment on the service? Was your timing schedule met? Were the staff attentive and prompt in following up your requests?
- ◆ What was your overall impression of your stay at the venue?
- ◆ What was the most positive point of your conference?
- ◆ Did the conference meet your expectations?
- ◆ Please comment on how you related to the information the presenter/facilitator delivered.
- ◆ Please provide any further comments

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You will find that this feedback will assist in future planning for your next conference.

Remember the prime conference objective in assessing the success or otherwise of your conference and keep the smaller "itchy" issues in perspective.

Often, the most effective communication and learning at conferences happens outside the conference room. This is when delegates presenters can interact face-to-face and relate their own experiences and learnings with others. Where people from across the state, from a different division or even a different company, share their accumulated knowledge and experiences.

This is the essence of a successful conference, the emotive touch, good old fashioned human contact where your emotions are challenged; you experience laughter and establish relationships with others. The challenge for conference organisers is to maintain the human touch and create the environment for it to be effective.

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CHECKLIST

- ☛ Achievement of original objectives
- ☛ Speaker relevance/style/delivery
- ☛ Organisation of venue
- ☛ Suitability and function of conference room
- ☛ Standard and quality of meals
- ☛ Overall balance of programme
- ☛ Relevance and value to delegates

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Help is at hand

If all this sounds like a challenging and onerous responsibility, it is.

Tens and sometimes hundreds of thousands of dollars are often spent on each conference. Making the event a success reflects well on the organiser. The opposite is also true.

This resource guide, whilst thorough, is by no means comprehensive. It cannot cover every aspect of all conferences. However, when used as a guide it has been found to be very helpful.

If you require further assistance with your conference, call on the experienced consultants at Key Conference Solutions. They can help you with all aspects especially planning and venue selection.

Call +613 9870 4611 or visit www.keyconference.com.au

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