

Checklists and Questions

Holding a successful meeting

By Bob 'Idea Man' Hooey, AS

Holding a successful meeting or convention is based on taking care of the details. Whether you are planning a small board meeting, sales meeting, AGM, training session or seminar or full-blown conventions you'll find the following questions valuable.

My special thanks to my fellow professional speakers and trainers in CAPS/NSA, most especially my friends from Arizona for the basic questions. I have added a few of my own based on 'learning curves' drawn from my real experiences (some expensive).

Pay attention to the detail and the meeting will run more smoothly. Just as I've challenged you to have a meeting plan and a definite agenda, having the answers to the following questions, where applicable, will make a major difference in your success.

GENERAL OR MEETING PROFILES

- Meeting dates? Can dates be changed to provide negotiation flexibility?
- What are the best ways to open and close?
- Sites of other conventions or meetings - Is there any feedback that might affect this year's choice? Will you need more than one hotel?
- Budget considerations or restrictions?
- Transportation supplied for attendees?
- Group fares - are they available?
- Travel agent necessary or available to help attendees?
- Ground transportation - arranged or included?
- What is the total projected attendance?
- Will spouses attend? What have you got planned for them?
- Break down attendance by day/function as necessary.
- How many suites and rooms required?
- How many will you guarantee?
- Hospitality suites? Offices? VIP accommodations?
- Will you control all room reservations?
- Should rooms be located together in blocks?
- How do you handle the hotel bills?
- What should happen as a direct result of this meeting? _____

- What do your attendees expect from this meeting? _____

- Are they a homogeneous group with much in common?

- How much do they know already about the proposed topics?
- Will you have general sessions only?
- Small groups/general session combination?
- Workshops? Seminars?
- Speakers/facilitators planned and booked?
- Will there be Q&A periods?
- What audio-visuals will be required for each meeting?
- Flip charts, Chalkboards, Floor lectern, Overhead projector and spare bulb, Computer LCD projector, Video recorder, 35 mm slide projector and screen?
- Any unusual a-v requirements?
- Will presentation be recorded or video-taped? (Discuss rights with speakers? Signed agreement for recording rights?)
- List meeting requirements for each day.
- Are exhibits planned? Trade show along with meeting?
- Will you need a separate area for them?
- Copy facilities available?
- Secure room/area required? Signs?
- Security guards necessary?
- Secretarial services needed?
- Telephone message center planned?
- Photographer required? How many days?
- Who will instruct the photographer on picture needs?
- Will you ship materials to headquarters hotel?
- Registration facilities needed?
- Registration procedures established?
- Registration personnel to be recruited hired and trained?
- Badges - designed or stock?
- Should badges identify categories of registrants?
- How will conference or meeting be promoted?
- Is a mailing schedule established?
- Local papers and media identified and contacted?
- Will press be invited?
- Insurance needs to be considered?
- What traditional social events should be considered?
- Opening reception?
- Awards Presentation?
- Closing banquet?
- Presidents or board reception?
- Emcee for any of above?
- Spouse tours? Plant or store tours?
- Greeting by local dignitaries?
- How much free time is planned for attendees?
- Are they encouraged to stay longer or come in ahead of meeting?
- What are their recreational preferences?

- Golf, tennis, walking/aerobics, water sports, sightseeing, theaters/nightclubs?
- Unrestricted sessions important?
- How are breakfasts traditionally served? Are coffee breaks supplied?
- Special diets required?
- What function bar facilities will be needed?
- Many individual cocktail parties?
- How many will visit in-hotel lounges/nightclubs?
- Can hotel shops expect heavy patronage?
- What follow up is planned after the meeting or conference?
- Other
- Other
- Other

SITE INSPECTION

- Does the city actively solicit meeting and convention business?
- What is the public's attitude towards conventions?
- Is there a convention bureau? What services do they offer? (Indicate charges, if any.)
- Publicity campaign? Promotion mailings?
- On-site press relations help?
- Planning assistance? Registration personnel?
- Bulletin typewriters? Bonded cashiers? Hosts/hostesses?
- Interpreters? Designation meeting coordinators?
- House bureau? Tour coordinators?
- What materials are available? (Indicate charges, if any.)
- B&W photos? Transparencies? Brochures?
- City guides? City maps? Badges? Specialty items? Banners? Posters?
- Which airlines serve the local airport?
- Direct service to how many cities?
- If service is concentrated within certain hours, indicate.
- Could these times affect meeting hours?
- Distance from airport to meeting place (time and fares)?
- Schedules and charges for limousine service?
- Is airport transportation system well organized?
- Problems which affect meeting attendees in transit?
- Would airport maps help? Can you get them? (Indicate charge, if applicable)
- Is convenient public transportation available?
- Which car rental companies have airport counters?
- Are sufficient porters on duty?
- What are the rush hours for local traffic?
- Total first class rooms convenient to meeting or convention?
- Are hotel groups in specific areas of town?
- New facilities planned prior to meeting dates?
- Is there a sales tax? Room Tax? Value added tax?

- Distance between main hotel and other facilities?
- Will charter bus service or shuttles be necessary?
- Distance between main hotel and prime attractions?
- Is public transportation safe and dependable? (indicate charges, if applicable)
- Any special cars or buses?
- Is a multi-hotel convention possible?
- Will the local auditorium fit your needs?
- What are the rental fees, rooms and capabilities?
- Is there a municipal exhibit center?
- Net exhibit space?
- Are there meeting rooms available there?
- What are the fees, capabilities and available services?
- What are move-in and move-out regulations, fees?
- Is lighting and ventilation adequate?
- Local labor problems affecting meetings?
- Rate local exhibit service firms?
- Are local a-v suppliers professional and reliable?
- Is rental equipment up to your standards?
- Can you get names and addresses for references?
- What recreational facilities are accessible to attendees?
- Tennis courts (locations and fees)?
- Golf courses (locations and fees)?
- Jogging paths (locations and fees)?
- What is the area's general security status?
- Any specific areas to be avoided?
- How do prices compare to last year's site?
- Holidays or special local events to help promote meetings?
- What local attractions are appropriate for attendees?
- Which are the best known restaurants?
- Which restaurants would match attendees' preferences?
- Which are the most convenient to meeting hotels?
- Are menus available?
- Hometown talent you can incorporate into meeting?
- Are interesting factories or institutions open for tours?
- Names and references for tour operators?
- Shopping areas of interest to your group?
- Local union regulations to consider?
- Other
- Other
- Other

HOTEL PROFILE

- Distance from airport and driving time?

- Direct transportation between the hotel and the airport?
- List same information for trains or buses, if applicable.
- Does hotel have on-premises parking facilities?
- Capacities and rates?
- Are airline offices in or near the hotel?
- Are car rental offices convenient?
- What is the total number of rooms?
- How many singles, doubles, and suites will the hotel commit?
- How many smoking and non-smoking rooms?
- What cable channels are standard on in-room TVs?
- What is the general level of housekeeping?
- Are hallways and public rooms clean and neat?
- Are public washrooms clean and well equipped?
- Is room service up to your attendee's standards?
- Are front desk personnel polite, efficient and helpful?
- Rate attitude and personal appearance of bell persons?
- Speedy elevator service? Large enough for your needs?
- Any bottleneck periods which could affect your meeting?
- Rate bedrooms for cleanliness and furnishings.
- Can the hotel guarantee room rates? How far out?
- Any physical changes planned for the hotel? When?
- Are copies of the plans available?
- Which unions have contracts for the hotel?
- Which regulations might affect your meeting?
- Other events before, during or after your sessions?
- Will hotel inform you, as meetings are booked around you?
- Hotel policy on hotel staff briefings by meeting planners?
- Will hotel supply copies of relevant staff memos?
- How long has the General Manager been with the hotel?
- Sales Manager? Convention services manager?
- What was the last position he or she held? Where?
- Policies on credit cards, direct billing and check cashing?
- Security available for materials and attendees?
- Will hotel supply extension numbers and duty hours of key meeting support people?
- Check hotel's projection screens for condition.
- What a-v equipment does the hotel actually own? (Rate each for condition and dependability.)
- Does the hotel recommend outside suppliers? (Why?)
- Is person in charge of hotel in-house equipment a repairperson, also?
- Hotel charges for using the equipment?
- Any special regulations for film projections?
- What is the total number of meeting rooms, which can be made available? (Capacity of each room?)
- Are floor plans available for each room?

- How accurate are advertised room capacities to practical seating requirements?
- What registration desk equipment is available? (Indicate which is free or fee) Where will it be located?
- Hotel's preferred method for handling reservations?
- Does the hotel offer free registration cards?
- How far out will hotel commit rooms?
- When must guarantees be reconfirmed?
- Are advance room deposits required? How many nights?
- What is the hotel policy on late arrivals?
- Is there a penalty for early checkouts? Late checkouts?
- How are the complementary rooms allotted?
- What variables affect rates?
- Are special rooms available for convention headquarters?
- Can private phone lines be brought into the office?
- When must final menus be submitted?
- When are guarantees required?
- What guarantees and taxes apply to food functions?
- Does the hotel offer room service?
- What are the hours and capacities for restaurants?
- What are the hours and capacities for public lounges and bars?
- Any unusual theme restaurants or lounges?
- Does the hotel have its own entertainment or disco?
- Is there a package room and what is its operating hours?
- What sports facilities are on premises? Others nearby?
- Is there a drug store in the hotel? A beauty salon? Shoe shine?
- List other shops in the hotel or adjacent.
- Other
- Other
- Other

WORKING WITH SPEAKERS AND PRESENTERS

- What type speakers - informative, humorous, and inspirational - will you consider?
- Will you need speakers, seminar leaders, or both?
- Will you need facilitators for breakfasts/feedback sessions?
- Will you need panel leaders, participants or emcees?
- What results do you want as result of the speaker's presentation?
- Do you want a free speaker or a fee speaker?
- Have you set an overall budget for speakers, expenses, and materials?
- Have you called for suggestions or advice?
- Will you frame your invitation early, to include: Reason for invitation? Subject of the speech? Purpose of the meeting? Meeting agenda? Audience size, age, educational level, gender? Topic and time allotted to the individual speaker? Question & Answer

or discussion period to follow? Site of the meeting? Discussion of honorarium and expenses you'll cover?

- Will you be able to meet with speakers personally?
- Are tapes or copies of speeches or presentations being made available?
- Have you worked out copyright, royalties and other legal arrangements with speakers in the event that their sessions are to be taped?
- If accepted, will you follow up immediately, confirming date, place, time?
- Determine special equipment, if any, required by speakers?
- Obtain biography, photograph, and introduction for speakers?
- Discover whether spouse will accompany speaker?
- Schedule rehearsals for coaching, if necessary?
- When will payments be made? By whom?
- Do all clearly understand financial arrangements?
- Will flowers or fruit be provided?
- Check for speaker's needs before the meeting?
- Have speakers been invited to pre-meeting activities?
- If necessity dictates a 'budget' speaker, have you considered some of these alternatives: Interview by "Reporter"? Panel discussion headed by your speaker? Question and answer sessions? Videotaped speech instead of live?
- Will you clear publicity releases with speaker? Can Speaker make them available to you for use in promotions?
- Get written permission (covering royalties, copyright, distribution and fees) in advance to tape outside speakers?
- Determine special a-v needs or props?
- Does speaker know the names and professional details of other speakers?
- Will speaker get badge and meeting kit on arrival?
- Will spouse or partner be entertained, transported, fed while speaker is working?
- Informed of any last minute changes?
- Audio-visuals, if any, set up and checked out?
- Is speaker's backdrop checked for distractions – mirrors, lights, doors, etc?
- Is stage to be cleared of any other speakers?
- All dishes and clatter to be stilled during dinner or meal speech?
- Will you take measures to fill rows down front?
- Will you save seats down front for head table during speech?
- Is there a timepiece of some sort visible to the speaker?
- Are water and a glass EASILY REACHED?
- Is there tissue easily reached?
- Will all slides, charts and visuals be set up and checked in advance?
- Will you furnish a stage assistant if necessary?
- Will the speaker be having books or tapes available for purchase?
- Will you furnish a resource table assistant if necessary?
- Have you cleared your introductions with the speakers?
- Will someone escort the speaker to the event?
- Have speakers been introduced to other participants?

- Does the speaker understand everyone else's role at that particular session?
- Is there an 'emergency' hot-seat speaker or program ready?
- Have local dignitaries been invited?
- Have they been provided tickets or passes for all scheduled events?
- Has local transportation been provided, if necessary?
- Informal 'welcoming committee' to await guests?
- Will you stick to the introduction agreed upon, verbatim?
- Will you keep the meeting and discussion within agreed time limits?
- Will you pay the honorarium or balance of fee before the speech?
- Will you pay the agreed upon expenses promptly?
- Will there be forms for audience feedback?
- Write speaker a letter of appreciation?
- If there was publicity or write-ups, will you send speaker copies?
- Will attendee comments or summaries be forwarded to the speaker?
- Is there a formal evaluation of the speech planned?
- Other
- Other
- Other

AV REQUIREMENTS

- What does basic rental include? What are extra charges?
- Available for rehearsals?
- Can equipment and materials be locked securely?
- Delivery facilities adequate? Maximum door size in length, height and width?
- Loading dock? Height? Maximum elevator size?
- What are local fire regulations? Must plans be filed with Underwriters? Fees? Liability insurance required?
- Are all workman unionized? One union?
- Any union regulations worth noting? Any sales tax?
- Are available floor plans accurate?
- Where are doors? Emergency exits? Pillars? Center aisles? Cross aisles?
- All accounted for in net space?
- Re-measured to check dimensions and obstructions? Ceilings sufficiently high? Reflecting mirrors? Hanging chandeliers?
- Can entrance doors be located behind audience in room set up?
- Can room be totally darkened for projection?
- Checkroom facilities nearby? Staffed?
- Room large enough to minimize crowding? Small enough to fill? Individual temperature controls in the room?
- Accessible? Air conditioning sounds a problem?
- Telephone in the room? Can it be turned off?
- Phone jack or Internet connection in the room? Will it be live?
- Distracting noises outside the building?

- Percentage of permanent seating? Temporary?
- Is temporary house seating comfortable?
- How many square feet per person when set up?
- Wide enough for your set up? With enough power?
- Are circuit breakers conveniently located?
- Platforms needed for projectors? What size?
- Room behind the audience to set up platforms?
- Will projectors be level with screen center?
- Are there room dividers?
- Are sliding walls really soundproof?
- If not, what will be happening in adjacent room during meeting?
- Is there a permanent stage? Height from floor? Depth, height and width suitable?
- Are there wings or rear areas for performers awaiting cues?
- Temporary staging available? What size platforms? Stage steps available? What size? How many?
- Standard runway (36" high, 42" wide) sufficient?
- Bandstand needed?
- Stage curtains that open and close? Motorized?
- Stage lighting sufficient?
- In-house supplementary lighting available?
- Draping colors/room decor compatible with presentation? Draping for stage required? For runways? For tables?
- Cherry picker available for high work?
- PA system adequate? Make? Wattage?
- High or low impedance? How many mikes provided free? Possible interference for wireless mikes? Where are the speakers located? Sound mixer available? Sound tech necessary? Can one be on call?
- Spotlights available? Operators necessary?
- Sufficient outlets? Additional outlets available?
- Permanent screen? Matte? Beaded? Color? Size? Height from floor? Front projection? Rear projection?
- Portable screen in good condition?
- What equipment is in-house? (List wattage, brand and condition)
- Slide projector (indicate slide size) Extra trays or carousels available?
- Overhead projector
- LCD projector for computer visuals
- Extra screens (list sizes)
- Whiteboards
- Electric pointers
- Flipcharts and easels
- Recording sound equipment
- Videotape recorders and players
- Tape format?
- TV/VCR (List sizes)

- Is there an in-house audiovisual supplier?
- Theatrical/House electricians rates?
- Includes benefit payments and any applicable taxes
- Overtime? Minimums? Call outs?
- Other
- Other
- Other

These are not the definitive list of questions for sure, but they do give you a sense of the detail that goes into staging a great conference or maximized meeting.

If you have any additional ideas, innovative solutions, success or horror stories and lessons to share with me, I'd be glad to hear from you. Drop me a note at bob@ideaman.net I'll include your ideas in a future list.

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