

CONFERENCE PLANNING GUIDE



COUNTRYPLACE

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INTRODUCTION

Over the past 25 years, CountryPlace has assisted with the planning and organisation of over 1000 conferences. We have accumulated significant experience in the conference planning process, and are keen to assist our clients with creating events that exceed their expectations.

This Conference Planner's Toolkit will step you through the planning process, ensuring your next conference achieves its planned outcomes. You will be guided from the initial planning stage, right through to your post-event evaluation. Successful, stress-free events are achieved when an event plan is followed, and we will equip you with the framework to become an efficient conference planner.

Each chapter of this e-book will take you through a stage of the conference planning process, and each will end with a planning checklist that is relevant to that chapter.



UNDERSTANDING THE PURPOSE OF THE EVENT

Before proceeding with the planning process, the purpose of the event must be documented and SMART event goals must be set. If this stage is overlooked, the continuity of the event will be at risk, and you may lose sight of the central reason as to why the event is taking place.

Comprehending your event type will help you set your event goals.

Various conference types include:

- Strategic Development/Corporate Retreat, to generate ideas for future success.
- Training and Development Workshop, to upskill and educate your group.
- Sales/Product Summit, to communicate new product information to the team.
- Association Meeting, to review past performance and determine future direction.
- Celebratory Event, to reward the group for their achievements.

Once you have refined the core reason for your event, set yourself SMART goals (specific, measurable, achievable, realistic, time-based), to keep you and your team accountable and aligned. Referring to the ‘who, what, where, when, and why’ involved with your event when goal-setting, will ensure that your benchmarks provide a holistic understanding of what the event should look like. Set as many SMART goals for your event as you please, but aim for at least 4-5. These goals will also provide you with the metrics to perform your post-event evaluation, as they will provide you the finite parameters to measure whether or not the event has been a success.

Examples of event SMART goals include:

- View and book a conference venue before November 2017 ('When').
- Select a venue in a picturesque location with at 30+ accommodation rooms and a conference room large enough to accommodate 60+ guests ('Where').
- Ensure that at least 80% of the team are able to attend the event ('Who').
- During the event, the team will discuss and complete the marketing calendar for the next financial year ('What').
- Based on data collated from event feedback forms, ensure that attendees feel more connected, rejuvenated, and motivated after the event ('Why')

Your brief from management regarding how this event should look, may help you generate these SMART goals. Consider how your success as an event planner will be judged, and how such successes can be proven.

Checklist:

- Clarify the key reason of the conference
- Clarify the type of conference you are organising
- Set approximately 4-5 SMART goals for your event
- Consider the relevant 'who, what, where, when, and why' when setting these goals



FINANCIAL PLANNING

The event budget often determines how an event is planned and executed. The sum of funding available may impact factors such as the duration of the event, the venue selected, the number of attendees permitted, and how creative organisers can be with customising the event.



A great way of commencing the financial planning for your event, is by listing all of the potential conference costs and formulating an estimate conference spend. Be generous in your assumptions, and be thorough.

Key conference costs include:

- Attendee transport (flights, transfers, etc.)
- Venue hire/conference room hire
- Catering
- Beverages
- Accommodation
- Trainers and facilitators (if required)
- Activities, such as team building activities or entertainment (if required).

If you have been awarded a specific budget by management in which needs to be followed, compare this with your above estimates. The breakdown of your estimate conference spend may help show management that further funding is needed to achieve your objectives, or the given budget may highlight that you need to reign in some of your event ideas.

Do not plan to spend all of the funding awarded to you for the event, at least not initially. Generally assume that costs can vary by about 10%, depending on year, time of year, demand, supplier discretion, and other variables. If you have money left in the bank once all key costs have been settled, you can then choose how to best splash this extra cash (increasing the amount of money on the group's bar tab is often a popular choice).

Remember that when making a booking with an event supplier (such as a venue) for a certain monetary value or for a certain number of people, you are financially bound to this agreement. If you sign a contract with an event venue for 20 people, but only 18 are able to attend, you will likely still need to pay for the 20 people covered by your contract. Do not reallocate this funding until you review your agreements with your event suppliers, and know exactly where you stand with each of them.

Checklist:

- List all predicted conference costs*
 - Travel/transport*
 - Conference room hire/venue hire*
 - Catering*
 - Beverages*
 - Accommodation*
 - Trainer or Facilitator costs (if relevant)*
 - Activities (if relevant)*
- Estimate the maximum number of attendees likely to attend the event*
- Set your own budget, or understand the volume of funding available*
- Ensure that the budget covers all conference costs*
- Remember to allow for 10% cost variance, and reserve some funding for unforeseen costs*

VENUE SELECTION

Once your event objectives are set, and you know the amount of money that you have to play with, it is important to start searching for the right venue. Conferences can be held at many types of venues, including specialist conference centres, resorts, hotels, and motels. The structure of the event (as explored in the 'event purpose' section of this e-book) will help you determine the preferred type of venue for you, and factors such as the types of function rooms required, venue capacity, the amount of guest free-time, should play a role in your decision.

A way of refining the type of venue you opt for, is by exploring your preferred geographical location for the event. The location or region in which the event is held will set the event tone upon arrival for attendees, and will add to the quality of the experience for the group.

Types of locations include:

- CBD
- Metropolitan
- Regional
- Seaside
- Wine region
- Mountain/snow areas
- Local, vs. interstate, vs. overseas
- Close to an airport for travelling guests
- Close to the office to minimise travel time



Once you have an idea of generally where you would like the event to take place, and the type of venue required, begin your research.

Key ways of conducting research include:

- Online searches
- Regional meeting and conference bureaus
- Trade directories
- WOM and referral

We find that on average, event organisers tend to book venues at least 3 months in advance, so it is important to make contact with venues in which interest you sooner rather than later. Do not assume that your preferred dates will be available, and displaying some flexibility may assist in your negotiations with venues.

Key details that venues may request when you initially reach out to them include:

- Preferred event dates, and any alternate event dates
- Guest ETA and ETD, and therefore the expected duration of the event
- Projected number of attendees
- Expected package inclusions (catering, accommodation, room hire, etc.)
- Budget
- Number of accommodation rooms required
(including whether you're after single rooms or shared accommodation)
- Contact details of the event organiser

By giving venues this information, they should be then able to provide an approximate price quote, and advise if they have the capacity and availability to accommodate for your event.

After reaching out to a number of potential venues, make a short-list of your 3 most-preferred. Request and review quotes from these venues, and ensure that you are comparing like-with-like. Venues all frame their package inclusions and costs differently on their proposals, so be clear on what they are each offering to you, and at what cost. Clarify any phrasing that seems unclear (e.g. there is great variance in how the term “beverage package” is used by venues) as you want to feel comfortable and confident with your understanding of each offering.



One you have reviewed quotes from these three venues, arrange a site-inspection for yourself at each. Whilst most venues have comprehensive photo galleries online, nothing quite beats the impression you get from exploring a venue in person. From visiting a venue, you should be able to determine if the site is a good fit for your event's requirements. Remember to refer to your SMART goals during the venue selection process, and ensure that your decisions align with the purpose of your event.

After visiting your short list of venues, you should be able to make a booking decision. You should feel comfortable when making this purchase decision, and should raise any outstanding questions that you have before signing. Remember to carefully read and understand the cancellation policy for your event venue, in case your event needs to be rescheduled or cancelled.

Checklist:

- Define preferred venue style*
- Decide on your preferred location*
- Establish ideal event dates*
- Generate a short-list of potential venues*
- Assess costs, standards, availability, and location of each potential venue*
- Ensure that you are clear on what each venue is/isn't offering in each proposal*
- Conduct relevant site inspections*
- Make a final decision*

PRE-CONFERENCE ORGANISATION

Once you have booked your event venue, your event planning must evolve to take a more operational focus. This is the time when all of the nitty-gritty details of your event need to be evaluated, and any potential challenges need to be considered. “Small issues can escalate into large problems, if not taken care of during the planning process” (Heffernan, 2015).

Imagining your way through your event from the beginning when guests arrive, through to when they depart, is a great way of ensuring that all factors are considered. Mentally run through the event agenda, and identify sections which may need extra attention during the pre-conference planning.

Below we have specified the key questions that you will need to answer during your pre-conference organisation:

TRAVEL

- Are guests likely to drive themselves to the event?
- Do bus/car transfers for guests need to be organised (i.e. to/from the airport?)
- If transfers are organised for a group of your guests, who will be the onsite contact to help coordinate drivers and attendees?
- Do guests require directions to the venue?
- Is parking available at the venue?
- Is parking complimentary, or does a parking fee need to be paid?

CONFERENCE ROOM/S

- How will the tables and chairs in the conference room be configured?
- Does the presenter/facilitator require their own table at the front of the conference room?
- What specialised equipment will be required for the conference room?
 - Whiteboards
 - Flipcharts
 - Pads and pens for each guest
 - Lecturn
 - Stage
 - Extra tables (e.g. sign-in table)
- What audio visual equipment will be required for the conference room?
 - Projector
 - AV cables (HDMI, VGA, AUX, etc.)
 - Microphone/s
 - Speakers/Sound System
 - Lighting
 - DVD player
 - Recording equipment (e.g. if the event will be streamed or filmed)
 - Access to power supply (including extension leads and power boards)



AGENDA

- What time are your guests expected to arrive at the venue for the event?
- Will guests all arrive at the same time, or will their arrival times be staggered?
- How will the event agenda be communicated to guests?
- What time would you like breakfast served each day?
- What time would you like morning tea served each day?
- What time would you like lunch served each day?
- What time would you like afternoon tea served each day?
- What time would you like dinner served each night?
- Will meals be served at the time each day, or will these times differ each day?
- Are any special activities taking place (e.g. team building) during the event?
If so, when will they happen, where will they happen, and who will be involved?
- What time is everyone likely to depart after the conclusion of the event?

Small issues can escalate into large problems, if not taken care of during the planning process. Heffernan, 2015

CATERING

- Have you asked your attendees if they have any dietary requirements?
- Have any confirmed dietary requirements been communicated to the venue/ catering team?
- Will guests require a meal upon arrival, or will they go straight into an activity?
- What style of breakfast has been arranged for each day? Where will it be served?
- What style of morning tea has been arranged for each day? Where will it be served?
- What style of lunch has been arranged for each day? Where will it be served?
- What style of afternoon tea has been arranged for each day? Where will it be served?
- What style of dinner has been arranged for each night, and where is this served?
- Do you need to make any decisions regarding the event menu, or does the venue select the menu on your behalf?
- Is there any additional catering included in your event package (e.g. fruit bowl, mints/lollies in the conference room, pre-dinner canapes)?

BEVERAGES

- Are any beverages included in your event package (alcoholic or non-alcoholic)?
- Do you need to add further beverages to your event package?
- Will guests settle any additional drinks, or will they be covered by event organisers?
- Would you like the bar closed at a certain time each evening, or would you like flexibility around the time closes?



ACCOMMODATION

- Will guests have single accommodation, or will guests be sharing accommodation?
- If guests are sharing accommodation, who will determine who is sharing with who?
- Is there sufficient accommodation onsite for all guests?
- What amenities are available in accommodation rooms for guests?
- Are there phones in the accommodation rooms for guests? If so, will charges be settled by each guest, or by the event organisers?
- What time is accommodation check-in from on the first day of the event?
- What time is accommodation check-out by on the final day of the event?

MISCELLANEOUS QUESTIONS

- Do any materials (e.g. gift bags) need to be transported to the venue for the event? If so, how will they get there? Will you utilise a staff member, courier?
- Who will greet guests upon arrival? Do guests need to sign-in for the event?
- Is Wi-Fi available to guests at the venue?
- What is the evacuation procedure in the case of an emergency?
- Will any VIPs be attending your event? Do any special measures need to be put in place to accommodate them?
- What recreational activities can guests take on during their down-time?
- What are some local attractions guests may like to visit in their down-time?

Checklist:

- Answer all questions from above regarding 'travel'
- Answer all questions from above regarding 'conference rooms'
- Answer all questions from above regarding the 'agenda'
- Answer all questions from above regarding 'catering'
- Answer all questions from above regarding 'beverages'
- Answer all questions from above regarding 'accommodation'
- Answer all 'miscellaneous questions' from above
- Put forward any additional questions that arise during your planning to your venue's event coordinator, your team, or other relevant suppliers.

EVENT MANAGEMENT

Once the event commences, you should be able to take a step back from the event planning, and enjoy the results of your hard work. Your travel arrangements will ensure everyone arrives on time, and your responses to the questions outlined in the 'Pre-Conference Organisation' section will equip your event suppliers to take charge.

Do not panic if changes to your plans arise, as some factors will always be out of your control. The event professionals that you will be working with, such as your venue's event coordinator, are used to spontaneous problem solving and thinking on their feet. If you constantly communicate updates and changes to your team and event suppliers, you are doing all that you can to accommodate for the last-minute variances. Remember to stay calm, and enjoy the event experience.



DEBRIEF AND REVIEW



After putting your feet up and enjoying a well-deserved latte after the event concludes, it is time to evaluate the event's success. Circulating feedback forms to attendees is the most forward way to gauge attendee sentiment, and learn of any resonating thoughts your guests may have. 91% of event planners find post-event audience engagement

a challenge (eventsforce, 2017), so be sure action your review process ASAP to maximise response rates. Creating an online survey (e.g. SurveyMonkey, Google Forms) is an efficient way to conduct a survey, as the responses given will be collated for you via the nominated program. This will save the time that organisers often spend reading and deciphering hand-written feedback forms. Distribute the survey link to attendees before the conference concludes, and follow up with a friendly reminder email a day or so after the event ends.

Of course, also refer to your initial SMART goals, and evaluate if you achieved your set objectives. Use the metrics articulated in your SMART goals (e.g. deadlines, attendee numbers) to measure your success in planning the event.

HELP IS AT HAND

We of course appreciate that all events are unique, and help is certainly at hand whilst you navigate the challenges of your specific event. This resource guide will help you understand the fundamental factors that need to be considered, but please reach out to the CountryPlace team for further guidance and assistance.