

# STEP BY STEP MEETING GUIDE

*You are not alone. We'll walk you through the event planning process by giving you every tool you'll need – event and meeting planning guides, and meeting planning services are at your disposal.*

## PLANNING YOUR MEETING



### Preplanning

- Determine the meeting or event purpose (board meeting, wedding, etc.).
- Consider the size of the group, gender mix, ages of attendees, and any special needs.
- Determine meeting dates. Avoid dates that coincide with other company or industry events or holidays.
- Are the dates and/or days of the week firm or flexible?
- Plan the meeting or event in advance to secure the most desirable space.
- Create an outline for each session or activity, including expected attendance, seating arrangements, required setup times, starting and ending times, and audiovisual and production needs.
- List food and beverage requirements for each occasion, including meals, receptions and breaks.
- Consider air and ground transportation needs.
- Plan entertainment and recreation needs, group activities and/or team-building exercises.
- Prepare an event timeline
- Budget for all sponsor expenses and calculate expenses for meeting participants.
- Schedule speaker(s), if required.



## Budgeting

- Determine which expenses will be assumed by the meeting or event sponsor and by the attendees.
- Create a balance sheet listing expenses for all functional areas of your meeting or event, such as staff time, marketing expenses, air and ground transportation, accommodations, food and beverage, entertainment and recreation, taxes and gratuities, service charges, and audiovisual equipment.
- Build in a contingency fund for unanticipated, last minute expenses.
- Don't forget expenses for licenses (music, written materials) and insurance (liquor and general liability, business cancellation and interruption).
- Check budgets from similar meetings and events to gauge cost.
- Secure the signature of the responsible person with fiscal responsibility in your company, association, or department, for contracting purposes.



## Meeting Space and Group Lodging

- Determine the type and number of guest rooms needed (singles, doubles, suites, specially equipped business rooms or rooms accessible for people with special needs.)
  - Determine the number and size of meeting rooms needed; use past programs as a benchmark.
  - Determine meeting room setup/configurations.
  - Be aware of seasonal UICC occupancy rates, room taxes and recent changes in supply or demand that will affect your expenses. Schedule around big events or other conferences that could limit hotel room supply and services during your meeting or event dates.
  - Determine speakers/presenters AV needs. Determine the availability and cost of this equipment.
- Submit a Request for Proposal (RFP)  
*Preparing the specifications and writing this information in one document is a valuable process because it requires you to think about all the needs of the group.*
    - Preferred dates and optional dates (if available)
    - Number and types of guest rooms
    - Number, size and usage of meeting rooms and the times they are needed
    - Range of acceptable rates
    - Dates and types of meal functions and breaks
    - Exhibits and any other special events or activities
    - Any related information such as complimentary requirements



## Food & Beverage

- Evaluate the cost and time savings for a small group to eat in a private section of the Marketplace or Skyroom, as opposed to having a catered meal.
- Write out the due dates for guarantees. Typically, guarantees are due 72 business hours prior to the event.
- Specify the “overset” in the contract. An overset is the number of people beyond the guaranteed number for which the facility will set tables and places.
- You will usually be billed for the guaranteed number or the number served, whichever is greater.
- Find out what service charges and/or gratuities will be added to the price of the meal and taxed, to avoid any surprises.
- Don’t compromise on quality. However, if your budget is restrictive, consider reducing the number of food functions you are planning for your meeting or event.
- Generally allow 30 to 40 minutes for breakfast, 45 to 60 minutes for lunch, and 20 minutes per course for dinner. For refreshment breaks, allow a minimum of 15 minutes for up to 100 people, 30 minutes for up to 1,000 people and 30 to 45 minutes for groups larger than 1,000.
- Consider a luncheon buffet for small group working sessions. Buffets offer variety and faster service.

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## Preparing for the Unexpected

- Send your rooming list well in advance, at least two weeks prior to arrival.
- Inform guests of the UICC's location and amenities.
- Send your meeting specifications to UICC two to four weeks before a meeting. List every meeting requirement, day by day, hour by hour.
- Don't forget to reserve space for your meeting office and speaker-ready room. Remember to make preparation for all food and beverage activities and events held off-campus. Include billing instructions and lists of VIPs to whom complimentary rooms should be allocated.
- Check the Event Orders (EOs) and Banquet Event Orders (BEOs). Check against your specifications and advise the UICC promptly of any changes or of your approval.
- Hold a pre-convention meeting 24 to 48 hours in advance of the meeting to review event expectations, procedures and to provide an opportunity to meet staff contacts who will help you with any problems.
- Never assume that a request has been taken care of - always double check.
- Work with the UICC to resolve any last-minute changes.
- Things to do daily:
  1. First thing each morning, secure a printout of all rooms in house and a report of any "no-shows" or cancellations.
  2. Early in the day, and again in the afternoon, meet with your UICC coordinator contact to review any changes in the program and/or meal counts.
  3. Each afternoon, set aside time to meet with accounting to review the bills from the day before and verify that your charges are correct.



## Post-Meeting/Follow-Up

- Hold a post-convention meeting with the same people who attended the pre-convention meeting. Evaluate what worked and what did not; review the bills and solicit feedback immediately from the facility.
- Ask your attendees to provide feedback about the program content and format, meeting facility, speakers, meal functions and other special activities.
- Write a meeting report and file it away and provide a copy to senior management.
- File contracts for future meetings.
- Write thank-you letters to staff, speakers, and other vendors.