

# MEETING PROMOTION AND PUBLICITY CHECKLIST

- Review previous years' promotional budgets.
- Determine objectives and scope of program.
- Determine audience(s): membership, potential exhibitors, an industry or trade, general public.
- Develop theme and corresponding graphics. Considerations should include purposes of individual pieces: who will receive them, tone to be conveyed, how they will be produced, how many colors will be needed, what layout is required at each stage (from rough to comprehensive), and how much is budgeted for them.
- Develop a schedule for the campaign.
- Set promotional budget based on characteristics of membership, features of the venue, time of year, strength of program, and costs of attendance.
- Develop promotional materials according to tested criteria: short and forceful sentences, convincing explanation of benefits to attendees, clear emphasis on important elements of meeting, and easy means of registering.
- Plan for all campaign items to carry theme forward, taking into account costs of special effects like embossing or die-cutting; quality, grade, weight and finish of paper; number of ink colors used; time for production; and quantity required:
  - Pre-meeting letters and announcements
  - Preliminary programs
  - Registration and housing forms
  - Promotional pieces for both exhibitors and attendees
  - Invitations
  - Follow-up mailings
  - Final agendas/program books
  - Badge inserts
  - Tickets
  - On-site registration materials
  - Signage
  - Newsletters
  - Lists of registered attendees
- Solicit a minimum of three competitive bids for all printing, checking samples of paper stock, samples of work for other meetings, references, and explanation of other services each firm can provide.
- Select printer(s), taking into account whether need is for "quick" or commercial quality, demonstrated ability of a single printer to handle all needs, availability of necessary equipment for jobs, and ability to meet deadlines.
- Agree with printer on schedule into which extra time is built, and monitor deadlines for rough layout, submission of copy, preliminary approval, completed layout, final approval of blueline, and delivery of job.
- Promote at previous year's meeting.
- Release promotional pieces, press releases, and related materials in accordance with schedule, with news releases preceding membership promotional mailings.
- Target local, national, international media as appropriate by type: trade papers, newspapers and periodicals of general interest, radio and television tailored to market.
- Control promotional costs through the following measures:
  - Obtain firm written bids for services.
  - Provide clean, competently proofread copy to printers.
  - Use standard paper sizes when possible.
  - Use same paper stock for many pieces.
  - Piggyback print items using same color.
  - Use standard PMS ink colors.
  - Reuse graphics.
  - Avoid unnecessary special effects.
  - Avoid perforations in favor of dotted-line cutting guides.
  - Coordinate printing times.
  - Set and enforce firm policy on overtime.
  - Minimize number of copy changes.

*Reprinted from the Professional Convention Management Association's (PCMA) "Living Checklist" series. To access additional "Living Checklists," visit the PCMA website at [pcma.org](http://pcma.org).*

# Site Inspection Checklist

Site Inspection Date \_\_\_\_\_

Completed By \_\_\_\_\_

## MEETING

Group \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Meeting Name \_\_\_\_\_

Type of Meeting?  Convention  Conference/Seminar  Professional/Business  Consumer

Committee/Board  Incentive  City-Wide  Trade Show  Special Event

Other \_\_\_\_\_

Meeting Date(s) including Day(s) \_\_\_\_\_

Date(s) Flexible?  Yes  No If yes, alternative date(s) \_\_\_\_\_

Day Pattern Flexible?  Yes  No If yes, alternative pattern \_\_\_\_\_

Meeting Planner \_\_\_\_\_

Planner's Company (if different than group's) \_\_\_\_\_

Planner's Address (if different than group's) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Planner's Phone ( ) \_\_\_\_\_ Planner's FAX ( ) \_\_\_\_\_

Planner's E-mail \_\_\_\_\_

## PROPERTY

Property Name \_\_\_\_\_

Property Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone ( ) \_\_\_\_\_ FAX ( ) \_\_\_\_\_

Sales Contact Name/Title \_\_\_\_\_

Contact's Direct Phone ( ) \_\_\_\_\_ FAX ( ) \_\_\_\_\_

Property Website Address \_\_\_\_\_

AAA Rating \_\_\_\_\_ Diamonds Mobil Rating \_\_\_\_\_ Stars

Airport(s) & Distance from Hotel \_\_\_\_\_

Complimentary Transportation?  Yes  No      Approximate Taxi Fare \$ \_\_\_\_\_

Type of Property?  Hotel  Resort  Downtown  Airport  Suburban  Conference Center  
 Convention Center  Restaurant/Banquet Facility  Other \_\_\_\_\_

Number of Hotel Sleeping Rooms – Total \_\_\_\_\_ Plus Suites \_\_\_\_\_

Rooms with King Beds \_\_\_\_\_ 2 Double Beds \_\_\_\_\_ Twin Beds \_\_\_\_\_

% Non-Smoking Rooms \_\_\_\_\_

Number of Restaurants \_\_\_\_\_ Number of Lounges \_\_\_\_\_

Construction Planned  Yes  No If yes, what and when? \_\_\_\_\_

ADA Compliant  Yes  No If no, why not? \_\_\_\_\_

**Rate the following: (1 poor – 5 average – 10 superior)**

- |  |  |
|--|--|
| Lobby Decor                            | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Lobby Seating/Location                 | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Lobby Condition/Cleanliness            | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Restaurant(s) Condition/Cleanliness    | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Restaurant(s) Décor                    | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Restaurant(s) Menu Selection/Pricing   | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Restaurant(s) Food Quality             | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Public Restrooms Condition/Cleanliness | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Public Restrooms Proximity             | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Lobby Decor                            | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Lobby Seating/Location                 | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Adequate Security                      | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Adequate Fire Safety                   | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |
| Overall Rating                         | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 |

**SLEEPING ROOMS**

Rack Rate      Single \$ \_\_\_\_\_ Double \$ \_\_\_\_\_ Suite \$ \_\_\_\_\_

Group Rate      Single \$ \_\_\_\_\_ Double \$ \_\_\_\_\_ Suite \$ \_\_\_\_\_

Complimentary Rooms      \_\_\_\_\_ per \_\_\_\_\_  Per Night  Cumulative

Plus Over and Above \_\_\_\_\_

Room Tax \_\_\_\_\_ % plus additional per night, if applicable \$ \_\_\_\_\_

Room Block by Day:

Day \_\_\_\_\_ Number of Rooms \_\_\_\_\_

Day \_\_\_\_\_ Number of Rooms \_\_\_\_\_

Day \_\_\_\_\_ Number of Rooms \_\_\_\_\_

Day \_\_\_\_\_ Number of Rooms \_\_\_\_\_

Day \_\_\_\_\_ Number of Rooms \_\_\_\_\_

Day \_\_\_\_\_ Number of Rooms \_\_\_\_\_

Day \_\_\_\_\_ Number of Rooms \_\_\_\_\_

Day \_\_\_\_\_ Number of Rooms \_\_\_\_\_

Cut-Off Date \_\_\_\_\_ Days Out \_\_\_\_\_

Rates available after cut-off date  Yes  No

Work Space/Desk  Yes  No    Dataport  Yes  No    Sitting Area  Yes  No

**Rate the following: (1 poor – 5 average – 10 superior)**

Proximity to Meeting Space      1 2 3 4 5 6 7 8 9 10

Decor      1 2 3 4 5 6 7 8 9 10

Condition/Cleanliness      1 2 3 4 5 6 7 8 9 10

Square Footage of Room      1 2 3 4 5 6 7 8 9 10

General Amenities      1 2 3 4 5 6 7 8 9 10

Bathroom Condition/Cleanliness      1 2 3 4 5 6 7 8 9 10

Bathroom Amenities      1 2 3 4 5 6 7 8 9 10

Overall Rating      1 2 3 4 5 6 7 8 9 10

**MEETING ROOMS**

Space Available on requested dates  Yes  No *Attach meeting schedule and space held.*

Room Rental Charge \$ \_\_\_\_\_

Set-Up Charges \$ \_\_\_\_\_

**Rate the following: (1 poor – 5 average – 10 superior)**

- Proximity to Sleeping Rooms 1 2 3 4 5 6 7 8 9 10
- Condition/Cleanliness 1 2 3 4 5 6 7 8 9 10
- Soundproofing 1 2 3 4 5 6 7 8 9 10
- Décor 1 2 3 4 5 6 7 8 9 10
- Ceiling Height 1 2 3 4 5 6 7 8 9 10
- Lighting 1 2 3 4 5 6 7 8 9 10
- Heating/Ventilation 1 2 3 4 5 6 7 8 9 10
- Sound System 1 2 3 4 5 6 7 8 9 10
- Equipment (e.g. tables, chairs) 1 2 3 4 5 6 7 8 9 10
- Elevators number/proximity 1 2 3 4 5 6 7 8 9 10
- Public Telephones number/proximity 1 2 3 4 5 6 7 8 9 10
- Restroom cleanliness 1 2 3 4 5 6 7 8 9 10
- Restroom proximity 1 2 3 4 5 6 7 8 9 10
- Overall Rating 1 2 3 4 5 6 7 8 9 10

**FOOD & BEVERAGE**

Approximate Cost for Continental Breakfast \$ \_\_\_\_\_/person

Full Breakfast \$ \_\_\_\_\_/person

Lunch \$ \_\_\_\_\_/person

Dinner \$ \_\_\_\_\_/person

Coffee \$ \_\_\_\_\_/gallon

Service Charge \_\_\_\_\_% Tax \_\_\_\_\_%

Guarantees needed by \_\_\_\_\_ days Overset guarantee by \_\_\_\_\_%

Any special packages \_\_\_\_\_

**Rate the following: (1 poor – 5 average – 10 superior)**

- Presentation 1 2 3 4 5 6 7 8 9 10
- Menu Selections 1 2 3 4 5 6 7 8 9 10
- Menu Prices 1 2 3 4 5 6 7 8 9 10
- Creativity 1 2 3 4 5 6 7 8 9 10
- Willing to Divert from Menu 1 2 3 4 5 6 7 8 9 10
- Overall Rating 1 2 3 4 5 6 7 8 9 10

**AUDIO/VISUAL**

In-house audio/visual company \_\_\_\_\_ Exclusive  Yes  No

Slide projector \$ \_\_\_\_\_ Overhead projector \$ \_\_\_\_\_

Data projector \$ \_\_\_\_\_ Screen \$ \_\_\_\_\_

Labor rates \$ \_\_\_\_\_

Union Rules  Yes  No If yes, what are the requirements \_\_\_\_\_

**Rate the following: (1 poor – 5 average – 10 superior)**

Equipment availability  1  2  3  4  5  6  7  8  9  10

Equipment condition  1  2  3  4  5  6  7  8  9  10

Equipment price  1  2  3  4  5  6  7  8  9  10

Overall Rating  1  2  3  4  5  6  7  8  9  10

**SERVICE & AMENITIES**

Business Center  Yes  No Hours \_\_\_\_\_

Parking  Yes  No Cost per day \$ \_\_\_\_\_

Fitness Center  Yes  No Complimentary for guests  Yes  No If no, cost \$ \_\_\_\_\_

Golf on Premises  Yes  No Tennis on Premises  Yes  No

Pool  Yes  No Indoor  Outdoor

Other \_\_\_\_\_

**Rate the following: (1 poor – 5 average – 10 superior)**

Overall Rating  1  2  3  4  5  6  7  8  9  10

**FACILITY POLICIES**

Cancellation Penalty by date \_\_\_\_\_ \$ \_\_\_\_\_

Attrition Penalty by date \_\_\_\_\_ and \_\_\_\_\_ %

Deposit by date \_\_\_\_\_ \$ \_\_\_\_\_

**ESTIMATED EXPENSES OF MEETING FOR THIS SITE**

Sleeping Room Expenses	\$ _____
Meeting Room Expenses	\$ _____
Food & Beverage Expenses	\$ _____
A/V & Other Equipment Expenses	\$ _____
Travel Expenses	\$ _____
Other Meeting Expenses	\$ _____
<b>TOTAL ESTIMATED EXPENSES</b>	<b>\$ _____</b>

**NOTES**

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## Site Selection Considerations

### Site Inspection Checklist

#### *The destination*

##### **Accessibility**

- o Ease and cost
- o Proximity to airport
- o Permits access by people with disabilities
- o Adequate taxi/limousine service
- o Sufficient parking space
- o Availability and cost of shuttle service
- o Adequate airport assistance
- o Adequate number of flights into destination
- o Seasonality of destination (peak season vs. off-season)

##### **Environment**

- o Availability of local attractions
- o Shopping
- o Recreation
- o Restaurants
- o Weather conditions
- o Appearance
- o Safety of area
- o Economic health of community
- o Reputation of area/facility for hosting meetings
- o Support and services available from local convention bureau
- o Availability of experienced suppliers, such as audiovisual firms, exhibit service contractors, temporary help, and security

#### *The facility*

- o Efficient, friendly doormen and bellmen
- o Attractive, clean lobby
- o Registration desk easy to find: sufficient space and personnel in relation to guest rooms; ability to handle peak check-in/check-out times for major groups; efficient front desk personnel
- o Modern elevators in sufficient number to serve guests when the facility is full
- o Accessible, fully-staffed message and information desk: rapid response to telephone calls; quick delivery of messages
- o Availability of guest services: drugstores, banks, emergency services, giftshop, concierge, safety deposit boxes
- o Comfortable clean rooms: furniture in good condition, modern bathroom fixtures, adequate lighting, adequate closet space and hangers, smoke detectors, fire exit information clearly

- posted, refrigerator and/or wet bar
- o Adequate lighting and cleanliness of hallways
- o Availability of beverage and ice machines on each floor
- o Service elevator accessibility
- o Size of standard room vs. deluxe room
- o Availability of “towers” or executive floor offering special guest services
- o Rooms equipped for people with disabilities
- o Number and types of suites and availability of suite floor plans
- o Reservations procedures and policies
- o Room category classifications (floor number, non-smoking, ocean view, etc.) and number available in each category
- o Number of rooms available for early arrivals and late departures
- o Current convention rate and rack rate for individual guests (not part of the group)
- o Date hotel will provide firm rates
- o Guarantee and deposit requirements
- o Check-in and check-out hours
- o Cutoff date for the room block
- o Check-cashing policies and types of credit cards accepted
- o Refund policy for cancellations
- o Number of non-smoking floors (standard and concierge)
- o Dates of any planned renovations
- o Any change in hotel ownership being discussed
- o Availability of a health club, hours, and cost
- o Telephone access charges (long distance, local, and calling card)
- o Key system for guest rooms
- o Adequate parking space (free or for a fee)
- o Hotel emergency plan (meeting manager should review it)
- o Hotel emergency exits clearly marked
- o Comparison of king-bedded versus double-bedded room categories

### *Meeting space*

Meeting rooms come in all shapes and sizes, and with a number of obstructions and inadequacies. The meeting manager must evaluate the potential of each room under consideration. They should measure the room, prepare scale diagrams, incorporate all equipment, staging and decorations, and calculate the desired square footage per person for the required setup. Below are some questions the meeting manager should be prepared to answer before the site inspection:

- o How many meeting rooms will be required?
- o In addition to the formal program, will meeting rooms be needed for committee and business meetings?
- o What is the estimated attendance for each session?
- o Are attendees to be seated theater style, classroom style, or conference style?
- o Are rooms with high ceilings and no columns or obstructions needed to accommodate

audiovisual presentations?

- o Is space needed in or near the meeting room(s) for refreshment breaks?
- o What pre- and post-meeting space is required for affiliated ancillary groups?
- o Are meeting rooms accessible to people with disabilities?

### *Food and beverage service*

#### **Public outlets**

- o Appearance and cleanliness
- o Cleanliness of food preparation areas
- o Adequate staffing at peak times
- o Attitude of personnel
- o Prompt and efficient service
- o Variety of menus
- o Cost range
- o Reservations policy
- o Feasibility of setting up additional food outlets for continental breakfast and quick luncheon service if necessary
- o Feasibility of using public food outlets for group functions during non-peak hours

#### **Group functions**

- o Quality and service
- o Diversity of menus
- o Creativity or access to companies specializing in this
- o Costs: tax and gratuities; projected price increase by the time of the meeting; extra labor charges for small group functions
- o Liquor laws (restricted times)
- o Cash bar policies: bartender cost and minimum hours, cashier charges, drink prices
- o Refreshment break pricing: guarantee policies, when a guarantee is required, number prepared beyond guarantee
- o Special services: tailored menus, theme parties, unique refreshment breaks, food substitutions available, table decorations, dance floor
- o Size of banquet rounds (eight people or 10 people)
- o Room service: diversity of menu, prompt and efficient telephone manner, prompt delivery, quality

### *Exhibit space*

- o Number of loading docks and proximity to exhibit area
- o Availability and location of freight receiving area
- o Location of utilities
- o Maximum floor load
- o Security of area
- o Location of fire exits
- o Proximity to food service areas, restrooms, and telephones

- o Availability of sufficient time for move-in and move-out
- o Reputation of facility regarding union relations
- o Decorations to enhance facility appearance
- o Availability of supplemental lighting
- o Proximity of exhibit hall to other portions of the meeting
- o First aid station
- o Availability of office space for exposition manager, service contractors, and suppliers
- o Crate storage areas and policies

*Offices and other services*

- o Sufficient space for furniture and equipment necessary to perform the business at hand
- o Good lighting
- o Easy for attendees to locate
- o Adequate electrical outlets
- o Availability of house telephones or telephone jacks
- o Ability to secure space after hours
- o Is the hotel flexible regarding the tentative agenda, or is meeting space locked in by a signed contract?
- o Are doors to meeting rooms wide enough to accommodate wheelchairs?

*Equipment*

- o Tables: six feet long, eight feet long, schoolroom width (15"-18"), rounds, 60 inches, 72 inches
- o Chairs

Source: *Professional Meeting Management, third edition*, published by the Professional Convention Management Association

## Food and Beverage Arrangements

### Catering Checklist

- o What is the estimated attendance?
- o What are the table linen color choices?
- o Are centerpieces and decorations needed for head and buffet tables?
- o How many places are required at the head table? Will the head table be on a platform?
- o Is a floor or table lectern needed? Where should it be placed?
- o Is a microphone needed? If so, what type and where?
- o How much time is needed for set up? When will the room be accessible?
- o Are meals to be served at the head table, or will dignitaries take their places from reserved tables after the meal?
- o If service is buffet style, are head table guests to serve themselves, or are servers to prepare their plates?
- o If meal tickets are to be collected, who will collect them and where, at the door or at the table? (Provide the caterer with a sample.)
- o How are late arrivals without tickets to be handled?
- o Are tickets required for head table guests?
- o Is a registration or supply table needed outside the function room? Is an award table needed behind the head table?
- o Are programs or menus to be placed on tables or chairs or distributed at the door?
- o Is a room needed for VIPs prior to the function?
- o Must special arrangements be made for guests with dietary restrictions?
- o Are there banners that need to be placed?
- o Is a coat check room needed?
- o If awardees are seated in the audience, how will they approach the lectern? Will a spotlight be used to illuminate their approach to the platform? Is the master of ceremonies to be spotlighted?
- o Is the national anthem to be played? In the United States, the American flag is required. (The American flag must always be displayed to stage right, and state flags to stage left.)
- o Will there be an audiovisual presentation? What type?
- o Is background or dance music planned?
- o Will there be a show or entertainment (including a band) for which an additional stage or platform is needed? If so, what size and height?
- o Are platforms and stages to be skirted and/or carpeted? Are there lighted stairs with handrails?
- o Is a rehearsal planned? When?
- o At what time will the doors be opened?
- o What is the timing for all aspects of the event? (Pre-program music, entertainment, meal service timing, formal program and presentations, dancing, etc.)
- o Where are the restrooms? What arrangements should be made to allow guests to re-enter the function room if door controls will be in place?

Source: *Professional Meeting Management, third edition*, published by the Professional Convention Management Association

## Negotiation Techniques

The following general principles must be remembered and applied to negotiations for any site, service, or supplier. By following these simple guidelines, a meeting manager can utilize the methods and lessons of meeting management in a more efficient manner.

Remember!

- Present and maintain a professional attitude.
- Control stress and tension.
- Avoid politics and egos.
- Take time to gather all facts and requirements beforehand.
- Meet with the proper hotel or site people who have the authority to make decisions.
- Know all the following Do's and Don'ts.

### **DO**

- Define the purpose and objectives of the meeting.
- Know the event.
- Have printed copies of meeting plans available.
- Make key contacts in all services and sites.
- Follow up frequently.
- Obtain peer referrals.
- Contact union stewards before an event at a union venue.
- Communicate with clarity and outline everything in writing.
- Make all agreements part of the written contract.
- Possess the authority to make a decision (or sign a contract).
- Possess the authority to make a decision (or sign a contract).
- Be ethical.
- Ask questions.
- Listen and pay attention.
- Minimize all distractions.
- Verify all legal clauses of the contract with an attorney.
- Know the budget.

### **DON'T**

- Sacrifice quality for cost.
- Make unreasonable demands.
- Insist on being the final authority.
- Be inconsiderate of a supplier's profit margin and business needs.
- Escalate and overestimate needs.
- Hesitate to ask questions.
- Be apprehensive about negotiating for everything required.
- Promise what cannot be delivered.
- Lie or misrepresent.
- Jump at the first offer.
- Pass up a good deal based on a personality conflict.
- Be intimidated.
- Hesitate to advise the facility of changes.

Source: *Professional Meeting Management, third edition*, published by the Professional Convention Management Association