

# SETTING OBJECTIVES

Meeting Planning adheres to the Five W's of marketing communications. The answers will provide what you need to begin the framework on which to build your meeting or event:

- **Who?** – Determine who will be attending (company employees and/or executives, customers, industry executives, spouses/children)
- **What?** – Determine the scope of the meeting (international, national, regional, state or local) and based on the event's purpose, define the most appropriate type or format (seminar, sales incentive meeting, trade show, annual company or association gathering, board meeting)
- **When?** – If possible, be flexible on the dates for the event. This can improve the chances of obtaining first-choice hotel arrangements within your budget. Consider the time constraints of the participants. Arrange dates to minimize attendees' time away from office and home.
- **Where?** – Decide what type of location is most suitable for your event purpose (resort, downtown / city center, suburban, airport, conference center). Convenience to participants is generally a prime concern. Attendees' travel to and from the event site should be as easy and as inexpensive as possible.
- **Why?** – Define the objective, reason, or purpose for having the event (sales meeting, launch new a product or service, industry trade show or event). What is the overarching company objective (to show how it aligns with it).

## Your Early Objectives...

There are many factors to consider when planning a meeting or event. The tips, checklists, timelines, and templates, on our site will help you plan and create a successful event.

### 1. Set Objectives: Creating the Meeting's Framework

The first thing any meeting and group event planner must understand is the purpose and scope of the event. What is to be accomplished?

### 2. Sketch Preliminary Meeting General Requirements

One of the best ways to do this is for you and anyone who can help you achieve your goals develop a preliminary schedule. The schedule should be a general outline of what will happen and approximately when.

### 3. Select Your Hotel Destination

This is the most important factor to consider when planning a meeting. With an understanding of the meeting's general requirements and budget, you can look for a hotel destination that meets these needs.

### 4. Clarify the Budget

It is critical to get a clear understanding of the meeting's budget. Ask the person calling the meeting to give you a specific figure to work within. As you make preliminary inquiries, you will quickly see whether the arrangements you're planning are possible within the budget limits.

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## 5. Get Organized

You've got the material and information to start framing the event including its general requirements. Now to develop the event - ou're ready to begin contacting hotels and planning specifics. You'll find it helpful to set up an organizer with sections for the various planning steps so you can keep all the meeting information in one place. I prefer a 4" binder - Some suggested section names include:

- Schedules
- Budget
- Hotel contact
- Contacts
- Rooming list
- Ground transportation
- Meeting room set-ups
- Audiovisuals
- Food and beverage
- Recreation
- Speakers
- Entertainment
- Spouse programs
- VIPs
- Letter of instruction

**Determining Meeting Requirements is a critical next step in the planning process.**

**Consider the following:**

- What part of the country or world is best for the event? What is the climate?
- How will the majority of attendees get to the hotel? Will they be driving? Flying?
- When will attendees arrive? For example, will participants get to the hotel the morning of the meeting/event begins or the night before?
- How many times will you need to feed attendees and when? Will all meals be planned or will some be "on their own"?
- Do you need to plan any recreational activities such as sightseeing or sports outings?
- Approximately when will attendees leave? After lunch? Late afternoon? In the evening?

**Timing and logistics of the meeting/event's program is an important part of the preliminary schedule. Some primary considerations are:**

- How many morning, afternoon and evening sessions will take place? Will more than one session be held at one time? Approximately how many people will attend each session?
- What meeting space and seating arrangements will be required for each session? Will you need a classroom arrangement? Theater? U-Shape tables?
- Will any audiovisual equipment be needed?