Roundtable Topics Summary
Notes Taken During the Sessions
February 17, 2010

1. **Ask the President:**
    - General discussion, but no notes were taken.

2. **Generating & Managing Leads: Sharing Challenges & New ideas:**
   Session One:
    - Cold calling means not being afraid of no
    - Voice mail then follow up by email
    - Mailing or bringing something unique
    - How many touch points = managing leads 15 times
    - Research/history/referrals/quality calls
    - Getting past no=numbers game: more you do the more you get
    - Be respectful of someone else's time
    - Value of handwritten note
    - True personality/personable
    - Advertising on facebook
    - Work with CVB/s or organizations, whatever works for you
    - Make time for prospecting
    - Be: focused, positive, organized, keep in mind what client wants/needs, creative, personalize
    - Challenges: rate, rate integrity, try to enhance experience instead of discount, history
    - Generate business: keep integrity, through Minneapolis-St Paul business journal, Google search, government stimulus=awarding contract, merger or acquisitions,
    - Getting to the right person: administration, who plans your travel, who plans your offsite events, vendors, where do they stay, befriend gatekeepers

   Session Two:
    - Leads generated by people we know. Referrals
    - Events in American" – website listing events throughout US.
    - Social Media: LinkedIn, Twitter-work very well nationally
        - Position yourself as an expert, don't do commercials
        - More professional – good starting point
        - Have to do it to stay relevant – is time consuming
        - Learn how to use it
    - They can't hurt you over the phone
    - Quotas – are they getting tougher
    - CVBs – Ask them to send you all leads
    - Networking through organizations – use contact to get other contacts
    - Work the leads and ask for the sale
    - Trade shows – be selective – invite clients before hand

- Initial Contact followed by business card. 3 month & 6 month follow up.
- Challenge – decision maker is 3-4 people removed. Often run by finance
- Hand written notes with business card.
- Challenge competition is under pricing drastically
    - Educating client about the value of your product.
- Take aways
    - Follow up, follow up, follow up
    - Use LinkedIn
    - Using more tactile things to connect

3. **Managing in a Difficult Economy:**
   Session One:
    - To bring business
        - Interns – young and creative
        - Facebook Ads (MN Humanities)
    - Need to be able to present value added
    - Challenge: finding new clients, finding more markets, do more with less, same quality with less dollars, less people to do the same amount of work
    - Utilize partners to full potential
    - Build relationships now and it will go back for more business

   Session two:
    - Supplier – increase to team vs. decrease, layoffs, fire vs. rehire situations
    - Supplier- Marketing/Advertising more-but backup needed. ROI a must
    - Supplier – Bonus structures changed for Sales Managers. Must meet goals for 2010 expendable at end of year.
    - Planner – Less people going to the meeting/event to save on dollars. Cuts the ability to have large enough event to show significant revenue for hotel too.
    - Sales manager is detailing as well as selling to eliminate added position of CSM.
    - Companies mandating taking days off – Holiday work or other
    - Hotels having staff completely take off on “dead” weeks
    - Cutting off staff-lean as possible
    - Companies on both sides cutting 401k match
    - How to articulate shared risk: asking hotels to cut penalties when they aren’t cutting registration or adding attendance
    - Helping each other out – hotels not collect on attritions/cancellation in order to keep long term relationship
    - “I’ll help you now with a promise of future business
    - Maintaining relationship is HUGE!
    - Developing something new to create difference
    - More partnerships in industry
    - Developing something new to create difference.
    - What is the pain point – how can we hope to get to the trouble spot?
    - What is least favorite thing with planning/contracting/negotiating?

- Perception is HUGE – keep it affordable - low to medium key is important – can't be considered 'elaborate' or wrong impression through company.
- Community outreach segment to create. PR generates awareness for company, while having the personal aspect.
- Supplier/hotel: Back end education – explaining our industry to clients in order to move ahead – we can't stay stagnant in 2010 as in 2009 or we will go under.
- Moving programs to 2nd tier cities vs. 1st tier, in order to get better pricing
- Vice versa- sometimes you can't find amount of space needed.
- Movement from Ritz to Hilton or Hilton to Embassy in order to justify program/cost or obtain lower prices.
- Huge ROI awareness of having meetings and how it affects whole travel industry.
- Nation discount program
- Planners' ability to show cost savings – Report on hindsight to show how much they were able to save!
- Increased sales efforts – see you are doing more in order to keep awareness, build rapport – long term thoughts vs. immediate focus.
- Increased lead generation (CVB standpoint)
- Airline industry change impact on other travel industry – breakdown of costs (luggage) perceived as "nit-picking"
- More hotels working with airport commission locally in order to keep costs in check
- Promotion of Positive atmosphere
    - Speaking with one another – hoteliers to suppliers-on positive basis (things are picking up, things are looking good, more leads, improving) promotes encouragement and ability for planner to press for review on meeting (ROI, think again, - perhaps have that meeting after all)

4. **Keeping Your Career On Track in the Current Environment:**
   Session one:
    - Everyone wondering what road to take, what options are out there? For those not currently looking for a job or in transition interest in hearing options.
    - Talked about the 3rd party option: conference Direct, Helms Briscoe, experience, etc.
    - Try new things
    - Updating skills through education
    - Keep interview skills fresh & information fresh
    - As an older person, don't talk about experience from 'many" years ago
    - Networking attending event
    - Volunteering with and organization/events
    - Contact recruiter-interview them, see who may be able to get your name out

- LinkedIn – group shared information & resources

Session two:

- Staying marketable
- Developing new skills
- Volunteering freelance
- Stay focused
- Stay positive
- Padding resume with service projects
- Continued networking
- Those without spare time social networking
- Continue networking, keeping yourself out there. Stay fresh.

5. **Increasing the Overall Guest Experience of an Event:**

Session One:

- Service-little details make a great impact
    - Before, during and after the event (be consistent in your identity)
    - Developing the relationship & trust level with client
- Being proactive to foresee any potential problems
- Communication – how is it different now vs. 10 years ago
    - Ask how they like to be contacted
    - How does social media, email, etc affect others
    - Non-verbal signs can be more forth telling than some other communications
- How can you help improve Gen Y communication practices?
    - Hire good people
    - Make sure you give employees with potential the time and training
- Communication preferences and styles
- Working with multi-generation industry
- Personal touches make a big difference
- Being proactive
- How to provide great experience for the guest and client
- What is meaningful to each client

Session two:

- Dynamic speakers/trainers
- Engage guests from pre-registration to follow-up
    - Common message
    - Develop theme
- Icebreakers to get everyone to know each other
- List those that are registered so guests can see who is attending
- Details on how to get there/signage
- Connect speaker with guests before and after conference/meeting
- Provide evaluation for guests
- Space & room amenities-location
- Materials

- Complete a needs assessment of guests & share with supplier
- Proactive planning & building relations with guests
- Once there-how do you engage?
    - Ice breakers
    - Team building
    - Engage taskforce/ambassador groups to build everyone's experience
- Small details count
- Do pre-research – know your audience deeply
- How to get guest there for a networking event
    - Community project
    - Raffles
    - Small presentation
    - Straight forward to tell what it is
    - Experience of something

6. **Strategic Meeting Manage-Cost Leveraging in a Difficult Environment: Session One:**

- This table talked a lot about the SMMP wheel from NBTA
- Nikki Huckstadt mentioned that Honeywell Meeting Solutions has a policy in place to help qualify meetings: 10 people or more, or total spend of $15,000 – then the meeting must be registered with HMS.
- They use Starcite as their registration, sourcing and budgeting tool.
- We asked everyone how to track spend – Nikki offered to share her negotiated savings worksheet with the table. She will email after the fact.
- Hotels are primarily concerned with room revenue – need it separate
- Use a meeting card to track expenses
- Pre-negotiated short form contract (saves companies time and money)
- Nikki suggested helping to "market" your centralized program by doing a mini road show or if you can't afford that, putting together a slide slow with voiceovers. This can be easily emailed to your customers and meeting hosts.
- National Sales offices can also be a good resource for planners to help pull in customers who might have reached out to the hotels directly.

Session Two:

- During the 2nd conversation we talked again about the policy and approval process.
- We discussed centralized sourcing and how that can save time and money.
- Reporting and data is very important and Nikki stressed how much companies want to see this information.
- Also, as a way to help earn more business for your SMM, be sure to keep track of customer kudos and "wins" from key stakeholders and customers to help spread the word to other people who might have heard about your program.

- Be sure to always do a customer survey to help gather feedback. We talked a bit about whether or not there should be some sort of incentive to encourage people to complete the surveys.

7. Communicating Effectively with Hotels:
Session One and Session Two:

- From Planners
    - RFP, phone, email = methods of correspondence
    - Build consistent relationships with hoteliers
    - Talk about sq. footage upfront
    - Do not send big file with photos & sales kits
    - Do not phone immediately after you sent proposal-follow up with email
    - Provide best offer upfront we want you to supply optional date
    - Follow up phone call with email with contact information
    - Reception per head minimum,- this comes often from Vegas hotels – reception with no dinner
    - Don't like to "play all their cads upfront"
    - Be respectful of each other's time. Everyone is doing a lot of different jobs now.
- From Hotels
    - Provide CAD drawing to scale for room set up.
    - Cut to chase-discussing space needed
    - Include history of total rooms & rates & peak nights
    - Specify if you are not flexible on dates
    - RFP with detailed information
    - Send letter of regret if space is unavailable
    - If a specific year you were higher due to a great speaker be sure to include that information
    - Hotel people are trained to phone when they receive an RFP
    - Extending your RFP decision date is better than making it too soon
    - The more complex your RFP, the better chance of not receiving repeated phone calls from hotel
    - Include the decision process for the RFP (by committee, etc) on the RFP
    - A CVB will send to the appropriate size hotel
    - Ask your CVB for the list of the hotels the RFP was sent to
    - Suggestion to ask: how fast are the elevator banks, flow, include all concessions needed
    - Specify what is non-negotiable
    - Offer a deal on internet

8. Event Site Inspection Tips:
Session One:

- Multiple venues use CVP representative or 3rd part planner

- Transportation – important for events
- Internet – expected amenity
- Be specific about what you want to accomplish during the site visit
- Comp stays for site – clients can/can't accept
- Share things you can't learn from websites
- Like to meet GM, but briefly
- Share what you want to accomplish (if you know)
- NS) involvement important

Session Two:

- Determine your criteria first –ex: city vs. city or hotel vs. hotel
- Hotel people are good at giving tours
- Event venues – you need to be prepared with questions
- Know your client's tastes, likes, etc
- You may want to develop a checklist
- Planner need to communicate <u>all</u> information to supplier
- Supplier needs to request <u>all</u> information from planner
- Soft ideas: give staff a photo of person so hotel staff can say "Hi"
- GM stops to meet, hotel representative meets you in lobby, hotel provides extra service to another service provider they are partnering with (ex: décor, AV set up crew), all around friendliness of staff
- Need to look at the capacity the hotel's internet can handle
- Hotels should follow up to a site visit

9. **What programming or content elements are you using to increase meeting attendance and excitement?**

Session One:

- "Lay away" plan for payments, monthly payments for hotel/registration
- Discounts for multi-attendees
- Education should be timely
- Community service event 200 people
- Make sure speakers fit the group
- Set up face-to-face networking
- Always have a theme (results of goals & objectives) and work as many elements of meeting into theme
- Goals and objects can be value the planner adds to the event
- Personal link to hotel website
- Social media: facebook ads can be targeted
- Customer service is key, buyers should also be respectful of info needed by suppliers
- Attendee engagement: give attendees control of their simulations, let them pick the topic, ask them to "teach"
- Shameless self-promotion, learn it, use it
- Fire mediocrity, celebrate successful failures
- Pressure to exceed last year, but we should trigger emotions & experiences

Session Two:

- Facebook
- Using panels rather than one speaker gets more attendance
- Allotting time for attendees to have one on one with speaker
- Goals & objectives are imperative for the speaker to provide. The attendee must walk away with something.
- Proposal template provided & utilized
- Sound bytes from speakers (before meeting) to prospective attendees to drive attendance
- Build a connection with attendees & speakers beforehand with video's (Dental association uses U TUBE)
- Put a shock collar on speakers
- Focus more on content rather than discount – help attends justify their attendance to their companies
- Promote bringing families to meetings to promote attendance.
- Continually evaluate whether meeting content is attendee appropriate
- By sending out evaluations (feedbacks) it can also springboard ideas for future meetings.
- Because of budget slashing, a lot of people are going back to old fashioned ways of selling & promoting
- How do I give the "personal touch" to prospective attendees to promote relationships
- Don't "nit pick" in the evaluations. Leave broader questions.
- Ask your president to contact the attendee's president to encourage their employees' attendance. Go from the top down.
- Show statistical value of attendee's presence at meetings
- Use meetings to allow attendees to get certifications at the meeting & to test at the meeting

10. CMP, CMM Certifications:

- Participants discussed current information about how to obtain the certificates. No notes were taken.

11. Getting the Most ROI Out of Your Event:
Session One:

- Theme
- Brand the event creates a framework for a community to grasp onto
- Taking risk can lead to increased ROI
- Communication & listening
- Developing relationship/build trust
- Identifying stakeholders
- New blood/new life
- Content is KING
- Comments after the event
- Social responsibility increase CSR
- Innovation & creativity

- Attendance sponsorship guarantee
- Experience (passion)
- Develop-theme or brand for event
- Experience is key

Session Two:

- We need to measure the worth of our meetings and know our clients and their expectations.
- It's important that attendees feel the event is for them.
- Ask attendees what would make this event worth their time & money
- Measuring the worth of the meeting with evaluations/surveys, pre/post tests, profits in sales motivations & excitement, team building. Set goals at the beginning of a meeting. Finding a way to measure the outcomes it the hardest part.
- Keeping good data and history of meetings to compare year to year.
- ROI is a continuous process looking at qualitative and quantitative data
- Plan ahead with goals, manage expectations, keep them consistent year after year
- ROI is hard to measure. Have to find tangible ways to measure subjective ideas and goals. Focus on the attendees/clients, the meeting/events are for them.

12. **Creative Décor on a Limited Budget:**

Session One:

- Use items readily available in the area
- Simple items can be very effective – a single flower
- Use interesting venues that don't require lots of extra décor
- Dollar stores, IKEA and other value stores can offer bulk items at low prices to use for tables, reception, etc
- Spend dollars on a special quest vs. flowers or centerpieces
- Offer take aways like a photo with the quest
- Use what is available for free or next to free: pinecones, sand, acorns, pebbles
- Use CVB for free & labor/volunteers & resources for free or discounted entertainment – some from local universities

Session Two:

- Using items creatively – decorating with same color, twigs, bud vases with single flower
- Mirrors & votives
- Creatively incorporating photos
- Use what you have
- Napkin folding
- Freecyle.org
- Andersensprom.com
- Lighting
- Get items that can be reused

13. Effective Partnerships with Suppliers:

Session One (no planners in group):

- Personal touch – handwritten notes – unique items
- Face to face communication
- Suppliers establishing relationships with other suppliers to meet planners. Unified teams. Saves suppliers time. Visit Duluth – monthly meeting with suppliers
- 3rd party planners are becoming a bigger player in the meeting industry
- Networking allows planners to get to know suppliers in a non-sale situation
- Budget affect relationships
- National meeting for organizations bring out more decision makers
- Compromise – neither side should exploit advantage to the fullest
- Hurdles with planners – naïve buyers
- Become a consultant – add value through expertise

Session two (6 suppliers & 1 student working part time for meeting planner):

- Take away relationship, trust building
- Requires more contacts with the planner or organization to get in the door
- More value for the dollars
- Fear of change
- How do we present to client – lay it on the line –be honest up front
- Realize that the supplier needs to change as well as the client
- Use electronic media, use 6 degrees approach, elevator speech
- Keep lines of communication open
- Establish a regular check up meeting
- Become the consultant to the client
- Develop and use an expectation check list
- Establish and set expectation on both sides