

# Take a Professional Approach To Meeting Planning

## Knowing Where To Find Things and How To Put Them Together

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The task of planning your next training program may involve nothing more than requesting a meeting room from your organization's central scheduling. On the other hand you may suddenly be given the task of scheduling a national conference complete with a few thousand people and 50 separate meetings.

As a training director, you frequently fall heir to planning not only to your training meetings, but also other meetings for your organization. There is probably some degree of logic in giving you this responsibility. Most meetings have an educational overtone to them — and you seem to have a flair for organizing things, so why not give you the responsibility for the sales meetings and regional conferences as well as those

intimate little training sessions.

There is technique and knowhow that is definitely involved in organizing and conducting effective meetings. However, if your background doesn't include some experience as an association executive, chamber of commerce official, or work in the hotel-convention trade, it's quite possible that you may suddenly find yourself faced with the rather staggering responsibility of a large meeting with very little experience to draw upon. A few bits of useful information and some rough direction offered here may smooth out the process for you.

### Three Factors

In planning any meeting there are three primary things you must keep in mind: (a) program, and

accompanying facility needs; (b) location and accessibility; and (c) timing.

### Program

The first of these, *program*, is obviously the cardinal consideration in planning a meeting. If you are working with a small group of executives on a management development session, an out-of-the-way retreat house in backwoods New Hampshire probably makes more sense than the raucous competition of Las Vegas nightlife. If you have a major national meeting, the large convention centers are probably best equipped to handle your needs. Most modern hotels and meeting centers can meet rudimentary requirements in terms of facilities, arrangements and equipment. A few, however,

make meetings a specialty and they can give you everything you need — and then some.

*Location* is no small item, not only in terms of the program and the facilities available at that location. Perhaps the greatest concern with location is that of cost and travel. Often the question of location must be resolved on this one issue alone. If you are organizing training sessions, and your organization has people scattered all over the country, some astute planning and an accurate cost assessment is definitely in order.

Take a moment to consider the time and distance involved for each individual attending your meeting to be there. Unless you have an entirely captive audience, a few extra hundred miles may spell the difference between a successful meeting and embarrassment. Tied directly to this is the question of expense, whether to fly a training team around to various locations, or to fly people somewhere for a training session. Usually the decision goes in the direction of moving the training people around.

On the other hand, there are sometimes considerations other than costs. There may be a specific reason, for example, to hold a seminar in Washington, D.C. where you have access to your congressional delegation, or where certain speakers are available to your meeting. Also a reprieve from the day-to-day work environment is often essential for open discussions on organizational development, human relations, etc. that simply wouldn't come off in the same fashion on home turf.

#### **Timing**

*Timing* is directly related to program and location, yet it has elements all its own. The better meeting sites are often heavily booked, particularly at certain times of the year. We would all like to have our December meeting in Miami, but, even if you can afford

it at premium rates, there's the question of scheduling. If you're planning a mid-season meeting at a hot location, plan ahead — well ahead. On the counter-side, if you want some excellent accommodations and you have to watch your meeting budget, don't overlook some of these attractive locations on the off-season. Timing also ties into program. For example, if you are running a sales training program, your timing is critical in matching strides with new lines as they come on the market.

Timing, location, cost and program all come together under the careful hand of a good meeting planner. Make a few mistakes, and an otherwise enjoyable meeting can become a Pandora's box of headaches.

You, however, don't have to travel in the dark in planning your meetings. There's a great deal of valuable information around, if you know where to look for it. And if you want to become professional about it, there are some very good training activities and courses available.

#### **Resource Materials**

Executive directors of the nation's professional and trade associations are very likely the most experienced groups when it comes to planning meetings. Their professional membership group, the American Society of Association Executives (ASAE) publishes a monthly periodical, *Association Management*. A great deal of this magazine's content deals with meeting planning and management. ASAE also has an excellent professional development program for its membership. Seminars, and even formal graduate degree programs are available. These programs are open to non-members; many of them have excellent material for meeting planners in all facets of the trade, training directors included.

Another periodical, *Meetings and Conventions*, focuses exclus-

ively on the meeting and convention business in this country. Not only are its articles extremely informative, it also carries extensive advertising by hotel and convention centers. Free promotional material is readily available from them.

Another basic tool for the meeting planner is the *Association Executive's Buyers Guide* published by Columbia Books. This yearly publication has a complete listing of major hotels-motels together with their capacity, the number of meeting rooms available and a potpourri of valuable information about support services for planning and conducting a good meeting. From this guide, convention bureaus and hotels can be individually contacted — and of course they are always willing to provide you with information.

#### **Action Approaches**

to executive development, team building, OD work -- through role training and psychodrama methods.

#### **Creative Approaches**

to corporate problem-solving: managerial, technical/scientific, marketing -- through group fantasy and/or hypnosis experiences.

#### *Behavioral Studies Institute*

10795 Wilshire Blvd. # 6  
Los Angeles, Ca. 90024  
Phone (213) 475-4666

Ira A. Greenberg, Ph.D.  
Executive Director, whose books include: *Psychodrama and Audience Attitude Change*, \$10, and *Psychodrama: Theory & Therapy*, \$14.95.

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we are on call  
for emergencies.**

Circle No. 467 on Reader Service Card

Tourist Bureaus and Chambers of Commerce are in the business of promoting meeting and convention facilities in their communities. Not only will they provide you with information regarding meeting accommodations, they will often assist you with arrangements and provide a wide variety of host items such as welcome packets, pencils, maps and even registration teams, if your group is interested. Don't overlook these groups in planning your out-of-town meetings. Of course, tourist bureaus, convention centers and chambers of commerce are promoters and they will try to sell you their product. There is obviously a sound balance between what you are being sold and what you want to buy.

Another essential publication for the convention and meeting planner is *World Convention Dates*, a monthly listing of scheduled meetings throughout the United States and even in many major foreign cities. In forecasting your own meeting programs, you may decide against meeting in a certain city at the same time two major national conventions are in town. An analysis of the projected meeting dates listed in *World Convention Dates* can tell you what are the most active convention sites for what type of group at what time of the year. This information can be extremely valuable in terms of knowing what other people are buying, or what site you may wish to avoid because of undue competition with other groups.

If your professional responsibilities involve heavy scheduling of meetings and conferences, you may wish to join groups such as the American Society of Association Executives, the American Society of Corporate Meeting Planners, or the World Meeting Planners Congress. Membership in these groups, either as an active or associate member brings you into

direct contact with professional meeting planners. Like any other business, if you want to really learn something, learn it from experts.

#### Need a Consultant?

If you suddenly are faced with the responsibility for a major exhibition or convention, and you have a sinking feeling that you are in over your head, don't wait, get some *professional* help! There are a number of national and international firms which specialize in organizing conventions and exhibitions. These outfits have all the necessary contacts and know-how to smoothly pull together anything from a small conference to a major convention of 10,000. They know where to secure displays and can help you market your exhibit space. They can recommend good keynote speakers, make arrangements for sightseeing (don't forget some-

thing for the spouses), and make travel and hotel arrangements. Because they know the business, they will in all likelihood save you money in the long run. You can find listings of these convention specialists in the pages of *Association Executives Buyer's Guide* and the *World Convention Dates*.

Arranging a training meeting or major conference is simply a matter of knowing where to find things, and how to put them together. If you systematically build a library of useful reference materials, if you subscribe to periodicals focusing on meetings and conventions, and if you develop professional contacts with people who are actively involved in the meeting and convention trade, you can soon acquire the skill to plan and manage meetings with the finesse of a professional, rather than with the trauma of an uninitiated amateur.

#### Sources of Information for Meeting Planners:

- **Association Executives Buyer's Guide.** Columbia Books, Inc., 734 15th Street, N.W., Washington, DC 20005.
- **Association Management.** American Society of Association Executives, 1101 16th Street, N.W., Washington, DC 20036.
- **Meetings and Conventions.** Gellert Publishing Co., One Park Avenue, New York, NY 10016.
- **Training and Development Journal.** American Society for Training and Development, P.O. Box 5307, Madison, WI 53705.
- **Training Resources '75.** American Society for Training and Development, P.O. Box 5307, Madison, WI 53705.
- **World Convention Dates.** The Hendrickson Publishing Co., 91 N. Franklin Street, Hempstead, NY 11550.

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