



JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



Jay Allen's guide to planning a HIGHLY Successful Event

Jay Allen

Global Award Winning Motivational Speaker

Published Author

Entrepreneur

W: www.JayAllen.uk E: Jay@JayAllen.uk T: +44 1904 599067



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A brief background

Jay Allen was one of those kids who 'just' got through school with sufficient qualifications to enter college, and 'just' got enough qualifications at college to attend University! He left still uncertain of his future, his career prospects and his life plan.

"Joining the Army was more a case of seeing what everyone else appeared to be doing, rather than a calling" Jay explains "I thought I'd sign up for the minimum 3 years to get the Alpha Male thing out my system"

Jump forward nearly 14 years and Jay was a career soldier, enjoying a good career, promoted through the ranks and enjoying everything military life had to offer. Until that one fateful day!.....

Jay is currently a 2 x Global Entrepreneur 'Big Impact to Business' Award Winning motivational speaker, a published business author and listed on the Smith & Williamson 'Clear Business Thinking' Power 100, as one of the top 100 business influencers in the UK.

He has either bought, acquired or set up from scratch, 4 of his own businesses (grown to 22 staff before selling) as well as co-founded 2 others (grown collectively to 34 staff) and currently sits on the Non-Exec board for an 8 figure print management company, as well as trustee for a forces charity!

He is the Director for the UK's leading Ethical Business Coaching Company, My TrueNORTH and the founder of the #ADDAZERO Business Challenge. Jay first took to the stage as a motivational speaker in 2011, and has been sharing his motivational and inspirational views on the world of business ever since.

If your seeking someone with raw passion, absolute determination and an ability to create such an emotional experience with an audience they speak about it for months afterwards, look no further than www.JayAllen.uk

The Guide

Hosting any event can be a nerve racking experience. There's an awful lot to consider, LOADS to plan and do before you even announce the date and often little recognition for the hours and hours of hard work required. Get it right and you feel AMAZING, get it wrong and you wonder why you ever bothered!

I've put this comprehensive, step-by-step guide together to help anyone hosting an event, from a small networking meet, through to an international conference in a bid to help you get the very best out of the event.

Dependent on the size and scale of your event, some of this may not be required, but all of it is designed to help you consider what's important to ensure you have a GREAT event.

I've also produced guides on:

- How to choose the right speaker(s) for your event
- How to get the best from your speaker(s) for your event

Enjoy....



KNOW YOUR RISKS

The planning of meetings and events requires complex activities, numerous suppliers, multiple resources and risk mitigation, and results in significant spend. An average meeting produces several contracts (hotel, ground transportation, audiovisual, activities, etc.). Many meetings and events are extremely visible to leaders and require high-touch services arranged by numerous planners. In contrast, some small meetings and events fall below the visibility of management — yet even these pose risks, use valuable resources and, when aggregated, result in high expenses for organizations. Risks fall into the following categories:

Reputation

The risk of not meeting the strategic objectives of the organization, which may arise from negative public opinion. Examples:

- Meetings/events held without purpose and in conflict with the organization's principles, which might result in negative public perception
- Employees asking for or accepting free services in the hospitality industry

Business operations

The risk that the organization structure, manual and automated processes, procedures and controls are not designed or functioning as designed to support the organization's strategic meetings management (SMM) objectives. Examples:

- Failure to help staff or know where staff are in times of crisis
- Physical risk/personal safety
- Multiple leaders on one aircraft
- Ad hoc planner pays invoices for a fictitious meeting-planning company and pockets the money.

Regulatory/legal risk

The risk of not meeting the strategic objectives of the organization arising from the company's failure to comply with external laws and regulations. Examples:

- Company pays fine for loss of private information.
- Auditor cannot locate contracts or invoices for services and deems the activity un-auditable.
- Important documents (e.g., contracts) are not held for a required period (often five or seven years).
- Insurance rider for team-building event was not garnered, and someone gets hurt.



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Information Technology

The risk of not meeting the strategic objectives of the organization arising from the inability to implement efficient and effective information systems. Examples:

- Disparate data such as meeting attendees, contracts and costs in an email system, disparate database or file cabinet rather than collecting information via meetings-management technology
- Personal Identifiable Information (PII) sent through email without encryption; fees or fines could be incurred if data ends up in the wrong hands
- Available penalty credits are not displayed throughout organization, and money is lost

Market risk

The risk of not meeting the strategic objectives of the organization arising from the inability to adapt to changing external factors and service the customers. Examples:

- Customers do not receive quality treatment for meetings/events.
- Organization fails to recognize that the economic environment might require more prudent spending.
- Organization fails to properly brand meeting/event.

Financial risk

The risk of not meeting the financial objectives of the organization arising from the inability to manage financial obligations and risks. Examples:

- Loss of savings from lack of aggressive negotiations or loss of credits
- Loss of cost avoidance from lack of concessions in contracts
- Failure to reclaim value-added taxes (VAT)
- Failure to recognize invoice errors
- Failure to manage demand of services and meeting volume.



77 Questions to remember to ask!

1. What is the meeting objective?
2. What is the general purpose of the meeting?
3. What do you hope to accomplish?
4. What is the expected outcome, and how will it be measured?
5. Do you require a baseline of information before the meeting/event starts so that you can compare the information to the after-meeting/event results?
6. What type of meeting is it?
7. Who are the attendees?
8. Is the meeting/event “open” or “invitation only”?
9. How many attendees are expected?
10. How many attendees will require room nights?
11. Will attendees make their own room reservations directly with the hotel, or will you collect the RSVPs and provide a rooming list to the hotel?
12. When do you want to hold the meeting? (Check national and interfaith holidays.)
13. Do you have a second choice of dates?
14. For how many days will the meeting last?
15. What are the preferred days, month and year in which the meeting will be held?
16. What is the lead time before the meeting?
17. Where do you want to hold the meeting? [region, city, state, central location]
18. Where are the attendees coming from?
19. Are all attendees local (able to drive in)?
20. Are attendees regional (limited need for air travel)?
21. Are attendees coming from across the country or the world (most requiring air travel)?
22. Are there hotels or venues to which you would like to send a request for proposal?
23. Is it possible to consider using a facility that offers a Complete Meeting Package (CMP) rate that is all-inclusive and, usually, less costly than a hotel?
24. Are there penalty credits available for use (such as from cancellation of an event or travel)?
25. What is the budget?
26. Will you be paying for everything, or only partial expenses if attendees are contributing?
27. Do you have historic data from previous similar meetings that you can use?
28. Do you have a meetings-management technology system that you can use to create and store the budget? Do you need a mobile app? Do you need RFID? Do you need more bandwidth?

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29. Have you considered the costs of the venue/hotel sleeping rooms and room rental (if applicable), content, transportation (air, ground), audiovisual equipment, technology, food and beverage, shipping, print materials, security, on-site support, tax/gratuities?
30. What form of payment will be used? Will you have to pay deposits? Will you have to fill out a direct bill application?
31. Will the room and tax be billed to a master account, or will each attendee be required to pay for his/her own expenses
32. Will the attendees be required to submit a travel and entertainment expense report for the meeting expenses?
33. What is the proposed daily agenda (registration, general session, breakouts, meals, breaks, social activities, evening events, other)?
34. Will attendees all be arriving on the same day or on different days?
35. What type of activities would you like to include? If your activities are held off-site, this information can be determined after the hotel contract is signed. However, if you require special activities that will affect the cost of the hotel contract, it is important to discuss these before signing the hotel contract.
36. What ethical practices should be followed?
37. How are suppliers selected?
38. Is a site visit to the property or venue needed?
39. Should you consider using suppliers that are registered as diverse, e.g., minority-owned, woman-owned, etc.?
40. Should you consider using a supplier who support GREEN Economy efforts?
41. Are you prepared to commit to signing a contract to hold the meeting?
42. Who from your organization is allowed to sign a hotel or other type of contract?
43. Will someone from your legal or procurement department review the contract?
44. Are you prepared to commit to an accurate number of attendees?
45. What type of reporting do you need? Consider: volume statistics, attendee and/or budget-holder customer satisfaction, budgeted costs vs. actual expenses, cost per person, per day.
46. Are there policies or rules that should be followed (e.g., allowable business or first-class travel, single rooms vs. shared rooms, limited number of employees on the same plane)?
47. How are exceptions going to be handled?
48. What type of technology will facilitate the sourcing and planning process?
49. What functionality does the meeting technology offer?
50. Do you need a mobile app for the event?
51. Do you need an audience-response system?



52. What types of communications are needed (attendees, suppliers, speakers, support staff)?
53. How many resources are required for sourcing, pre-planning, on-site, financial reconciliation, website development, etc.?
54. Where will the resources come from (internal people, consultants, suppliers or a hybrid approach)?
55. Who from the hotel will be working with you after the contract is signed? (The salesperson will turn the file over to a convention services manager.)
56. How will you know what meeting rooms you have been assigned or selected?
57. What else should you tell the hotel, or should they be asking you?
58. Are you confident in the room setup?
59. Will catered meals/breaks be offered? Which meals/breaks?
60. Will you use sit-down, plated service or buffets?
61. Do you need box lunches for the day of departure?
62. Will you have a reception before dinner?
63. Will alcohol be served?
64. Will any meals be taking place off-property (at a place other than the meeting venue)?
65. Is there a minimum amount of money you need to spend on food and beverage?
66. Is there a limit as to how many of your organization's passengers may be on one aircraft?
67. What travel Management Company or agency do you use? Can you use the meeting planning company's agency?
68. Do you need ground transportation to pick up attendees from the airport? Return attendees to the airport?
69. Should you use the hotel's audiovisual supplier or a different one?
70. Should you load the presentations on to our own laptops? Should we rent laptops?
71. Should you load presentations from one server onto the laptops, or individually, machine by machine?
72. Will attendees pay their own hotel bill and incidentals? Or will the room and tax be master billed, with incidentals going to their corporate card? Or will everything be master billed?
73. Do you want to give out gifts, incentives or amenities? To whom?
74. What will you do if there is a crisis during our meeting?
75. Do you have a crisis-management team in your organization? Do you have all of their contact information?
76. Do you want to do a pre-survey and then a post-survey of the topic, so you can identify the improvement (or return on investment)?
77. What could you have done better?

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The Meeting Planners 'To do' List

The following checklist is not in chronological order, but rather grouped by topic. Some tasks might need to be done months in advance, and some can be done closer to the meeting. The best thing to do is to put this document into Excel, add in the dates and then sort it in Excel by date, so that you have a chronological project plan.

√	Description
	Meeting name:
	Dates:
	Location:
	Person responsible:
	Additional resources and their roles:
	Activity (followed by target due date/comments):
	Consulting with the meeting sponsor:
	Meet with business leader, meeting sponsor or budget holder to get the key questions answered and understand needs
	Agree on weekly, biweekly or regular audio conferences or meetings with all stakeholders. Use same dial-in, time and day if possible. Review this checklist during each team meeting and provide updates.

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Sourcing/contracting:

	Provide information to the meeting requester on “avoidance dates” re: key religious holidays, organization closed, etc., if one of those dates is chosen and it isn’t obvious by reviewing the calendar.
	Get all of the data needed to begin finding the right location and property.
	Estimate/benchmark costs, including air.
	Request approval, if necessary, for estimated meeting costs.
	Receive approval.
	Determine who will do each part of the sourcing and planning; assign staff.
	Let the meeting sponsor know who the key contacts are.
	Request key measurable success factors (to measure business impact of meeting/event).
	Identify decision-maker/final authority and decision-making process.
	Request budget or help create one.
	Identify and document threats, risks (dates, attendance, instructors, changes, policies, travel, resources, etc.). Escalate if required.
	Update this checklist with all due dates as needed.
	Request air analysis from group travel/preferred travel management company (allow 48-72 hours).
	Send out venue Request For Proposal (RFP) allow 48-72 hours at minimum for a response from the properties. If you have access to a meeting-management technology, this can be automated very easily.
	Review and evaluate responses.
	Use responses/prepare cost site analysis.
	Contact security if applicable to review locations.
	Present options/cost analysis to meeting sponsor.
	Receive customer feedback/approval or revisions.
	Update cost analysis as recommended.
	Conduct site inspection.
	Ask and document minority business suppliers if this is a factor in the decision.
	Make decision on location.
	Negotiate venue contract with IT/procurement assistance, especially if your meeting requester has special IT needs or if the amount is over £25,000.
	Obtain customer approval on contract (you might want to use a customer sign-off sheet).
	Document the venue contract due date.
	Submit negotiated contract to next reviewer, and allow the next reviewer a couple of days at least before signing off on the contract.
	Ensure that the right person signs the contract — someone who is on the contract signature matrix (not everyone in an organization is allowed to sign contracts).
	Return signed contract to venue.

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	Receive countersigned contract, add to document-retention repository.
	Keep a file with everything; preferably, use meetings-management technology to record all of the information. Update meeting profile (attachments, status, financials).
	Submit deposit request(s); it is recommended that deposits be paid only to non-preferred hotel properties.
	Document minority business suppliers and provide this spend to procurement as applicable.
	Update meeting sponsor on budget (regularly).
	Update this checklist with all due dates.

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Planning:

	Work with meeting sponsor/contact on budget updates.
	Create, share and post all meeting planner, sponsor and stakeholder contact information with names, addresses, phone, cell phone, fax numbers and any other relevant information.
	Update this checklist with all due dates from meeting planners and stakeholders; attach to profile (if using meeting-management technology) and share with entire meeting project team.
	Request pricing from preferred ground-transportation suppliers for decision-making.
	Contact customer and discuss the logistics:
	Reiterate key measurable success factors.
	General sessions/breakouts/other
	Content consultation (agenda, objectives)
	Attendee management
	Security: Consult and obtain information.
	Information technology/connectivity/mobile apps, etc.
	Speakers/entertainment
	Off-site (destination management company needed?)
	Activities/guest program
	Branding/meeting theme
	Production/audiovisual
	Collateral/printed materials
	Shipping requirements (on-site/supplies)
	Ground transportation
	Food and beverage
	On-site office requirements (staff/equipment)
	Communications (with attendees, speakers, sponsors, etc.)
	Continuing education credits
	Incentives/gifts/amenities
	Get agreement from all stakeholders on timeframe for deliverables by you or other suppliers.
	Agree on cut-off date for technology/attendee registration to be sent and then closed for input.
	Determine if other meetings team or other staff members are required for assistance during planning and/or on-site. Identify support — use right skills/job.

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Content consultation:

	Discuss meeting objectives with customer; determine method to capture return on investment.
	Develop meeting flow chart/outline.
	Determine flow of meeting, general session, breakouts.

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Branding/meeting theme:

	Determine requirements.
	Contact creative services.
	Review branding policies.
	Determine what branding requirements will be required for website.

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General session/breakouts:

	Determine number of participants, timing, flow, requirements, proximity to other sessions, special requirements, minimum and maximum audience sizes, etc.
	Ask if prayer/meditation room/lactation rooms are required.
	Document above requirements, date it, share it and update with meeting sponsor regularly.
	Determine what requirements/verbiage will be required for technology website development.
	Ensure that technology developer is given ample time to develop.

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Speakers/entertainment:

	Gather options.
	Review options or ask customer to review.
	Send request for proposal or select suppliers.
	Review bids if request for proposal was used.
	Ask and document minority business suppliers if a factor in decision.
	Provide summary of all suppliers to customer.
	Select speaker/entertainment.
	Negotiate contract.
	Send negotiated contract to reviewer.
	Document contract due date.
	Obtain countersigned contract and attach to profile in technology system or maintain.
	Determine what requirements/verbiage will be required for website development.
	Confirm requirements/details (air, hotel, A/V, ground, etc.).
	Submit request for deposit.
	Ensure invoice receipt within 30 days or contact.
	Reconcile invoice.
	Submit payment request.

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Activities/guest programs:

	Gather options.
	Review options or ask customer to review.
	Send request for proposal or select activities.
	Review bids if request for proposal was used.
	Ask and document minority business suppliers if a factor in decision.
	Provide summary to customer.
	Select venue and/or activities.
	Negotiate contract.
	Send negotiated contract to reviewer.
	Document the contract due date.
	Obtain countersigned contract and attach to profile in technology system or maintain.
	Determine what requirements/verbiage will be required for website development.
	Submit request for deposit.
	Ensure invoice receipt within 30 days or contact.
	Reconcile invoice.
	Submit payment request.

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Off-site events:

	Gather options.
	Participate in event, tasting, etc. to evaluate.
	Send request for proposal or select suppliers.
	Review bids if request for proposal was used.
	Ask and document minority business suppliers if a factor in decision.
	Provide summary to customer.
	Select venue.
	Negotiate contract.
	Send negotiated contract to next reviewer.
	Document contract due date here.
	Obtain countersigned contract and attach to profile.
	Determine what requirements/verbiage will be required for website development.
	Submit request for deposit.
	Participate in event, tasting, etc. to customize.
	Finalize all off-site details, guarantees, menus, transportation, etc. Note: Ask customer how much input they want. Do they want to help select menus? Approve menus? Or leave everything to you?
	Ensure invoice receipt within 30 days or contact.
	Reconcile invoice.
	Submit payment request.

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Destination management company (DMC):

(Follow steps above for all activities/guest programs.)

If off-site events/activities above are extensive and require use of a DMC:

	Negotiated contracts to be sent to the next reviewer for signature 30 business days in advance of due date.
	Document contract due date here.
	Submit deposit request.
	Ensure invoice receipt within 30 days or contact.
	Reconcile invoice.
	Submit payment request.

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Travel

	Contact the preferred travel management company (TMC) to begin discussing how the attendees will make their air travel reservations (online booking tool, agent-assisted method), and how you will collect arrival and departure manifests so that the ground transportation company can pick up and drop off attendees at the right time.
	Determine if group travel or transient online booking tool will be used.
	Determine who will run manifests, how often, in what format. (Will it be the TMC group travel desk?) Is there a cost?
	Document the date(s) that the manifests are expected (every few days? Once a week? Day before the meeting?).
	Determine who will answer policy questions about travel exceptions.
	Determine what requirements/verbiage will be required for website development.
	Receive total airline cost for meeting/program (60 days after program end).

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Security

	Verify locations with organization's security team.
	Obtain venue disaster/emergency contingency plan from hotels/suppliers.
	Use Debi Scholar's Crisis Management Handbook (available on Amazon).
	Determine if additional security staff are needed.
	Role play with all on-site staff to be sure they are ready for each crisis.

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Website development

	Contact website developer, set up call with sponsor and source/planner to discuss registration options available. (When must registration go out to attendees?) Give developer 5-10 (preferably) business days to create website.
	Conduct call, discuss options, make decision on best method of registration delivery.
	Send email notification to website developer if registration communication is using the tool. Indicate anticipated launch dates.
	Document the anticipated launch date.
	Document the anticipated registration close date.
	Create meeting/event website in technology tool.
	Create custom pages.
	Set registration policies.
	Create contact fields on registration form.
	Create registration form.
	Set accommodation policies.
	Create accommodations form.
	Set travel policies.
	Create travel form or link to online booking tool.
	Review and update advanced option selections.
	Activate website.
	Test website (administrator testing).
	Distribute for team testing.
	Receive feedback from testing.
	Update website from feedback.
	Distribute website for registration.
	Grant access to website (outside of meetings team).
	Review data and ensure registration is functioning correctly.
	Train meeting sponsor or other staff on how to pull and create custom reports.
	Create scheduled reports (if needed).
	Review weekly or daily registration reports.
	Archive website in technology tool.
	Information technology:
	Meet with IT to determine requirements and resourcing.
	Provide cost estimates to customer.

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Audiovisual production

	Identify A/V production requirements.
	Identify virtual-meeting requirements.
	Send A/V specifications questionnaire to instructors/presenters.
	Determine if audience-response system or other technologies are required.
	Research vendors, including the national vendors (if applicable).
	Create/determine diagrams for requests for proposal.
	Send out requests for proposal.
	Review bids if requests for proposal were used.
	Ask and document minority business suppliers if a factor in decision.
	Select vendor.
	Negotiate contract.
	Send negotiated contracts to next reviewer.
	Contract due date.
	Obtain countersigned contract attach to meeting file
	Submit deposit request.
	Customer/production company develop presentation template and staging.
	Consult with marketing as needed.
	Coordinate any pre-meeting video shoots.
	Obtain certificate of insurance, security access, etc.
	Coordinate presentations and staging. Give to production company).
	Review final presentations for errors, consistency, spelling, etc.
	Update diagrams/requirements as needed.
	Develop and coordinate graphics materials.
	Ensure that the organization's branded colors work well with A/V and production.
	Develop and coordinate rehearsal schedule.
	Develop and coordinate director's agenda.
	Coordinate internal requirements, technology booths, etc.
	Coordinate general session requirements with production company
	Document and share schedule for load-in, crew meals, security, etc.
	Document and share production-company room requirements, travel schedules, etc.
	Schedule edits or additional video shoots as necessary.
	Ensure invoice receipt within 30 days or contact.
	Reconcile invoice.
	Submit payment request.

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Gifts/incentive/amenities:

	Determine requirements.
	Determine budget.
	Research vendors/use organization's gift shop.
	Present options to customer.
	Order gifts.
	Submit deposit request.
	Coordinate delivery to site.
	Reconcile vendor invoice if applicable.
	Pay final invoice.

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Print materials

	Determine requirements.
	Contact creative services or other.
	Receive all requirements from customer.
	Receive sample from creative services or other.
	Provide draft to customer.
	Receive customer approval.
	Coordinate production with creative services or other.
	Provide 5-10 business days for creative services or other for return.
	Coordinate delivery to site.
	Submit deposit request.
	Ensure invoice receipt within 30 days or contact.
	Reconcile vendor invoice if applicable.
	Submit payment request.

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Shipping requirements (on-site/supplies):

	Inquire if shipping services will be needed.
	Determine if shipping services are required on-site or just supplies.
	Submit form to shipping services with requests.
	Coordinate scheduling with shipping services.

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Ground transportation:

	Determine requirements.
	Send out requests for proposal or select supplier.
	Review bids if requests for proposal were used.
	Provide summary to customer.
	Select vendor from preferred vendors only unless exception granted.
	Negotiate contract.
	Send negotiated contract to next reviewer.
	Contract due date.
	Submit deposit request.
	Provide ground transportation information for registration.
	Provide manifest/final specs.
	Manage changes.
	Oversee on-site/act as dispatch if needed.
	Ensure invoice receipt within 30 days or contact.
	Reconcile invoice.
	Submit payment request.
	Capture and report transportation issues in the problem/resolution repository.

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Food and beverage:

	Discuss requirements with customer. This info should come back on registration from attendees, but be prepared to have Muslim halal meals, kosher meals, vegetarian meals and other diet-restrictive meals on hand.
	Obtain venue menus. Note: Ask customer how much input they want. Do they want to help select menus? Approve menus? Or leave everything to us?
	Identify how to make meals “healthy” so that you’re offering a variety of options.
	Consult with venue chef if applicable.
	Negotiate menu pricing.
	Provide venue with requirements.
	Provide venue with special meal requests.
	Submit guarantees.
	Receive banquet event orders (BEOs).
	Review BEOs (also in meeting specs).
	Share final BEOs with customer.
	Sign and return BEOs.
	Ask the venue to use labels to differentiate food (per allergies, etc.) if buffet.
	Determine and communicate special dietary needs.
	Attach BEOs to meeting profile if using a meeting management technology.

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Rooming list

	Prepare draft rooming list from technology tool or other reports.
	Ensure billing information is correct for all attendees.
	Prepare rooming list (singles/doubles, etc.).
	Submit rooming list.
	Confirm VIPs.
	Guarantee/release rooms as required.
	Update rooming list daily/weekly or as needed.

On-site requirements:

	Determine equipment and staff requirements.
	Contact IT/security/other with requirements.
	Order equipment.
	Order and ship supplies.
	Contact shipping services and order shipping supplies.
	Recruit office staff.
	Assign roles and responsibilities.
	Determine staff schedules.
	Decide and order staff shirts/uniforms.
	Communicate schedules.

Meeting spaces:

	Finalize agenda.
	Confirm A/V requirements.
	Prepare meeting specs.
	Prepare breakout assignments.
	Receive approval on meeting specs.
	Submit meeting specs.
	Finalize details (list if required).

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Communications:

	Between planner and sponsor:
	Project plan
	Budget from sponsor
	Billing instructions
	Final costs to sponsor
	Invitation list
	Final agenda
	Continuing education requirements/documentation
	Meeting specifications
	Regularly scheduled project team calls
	Registration website information
	Manage registration (cut off, deadlines, inquiries)
	Manifests
	Rooming list
	Debrief
	Between sponsor and participants:
	Hold the date
	Launch registration
	Communications/memos
	Registration reminders
	Confirmations
	Evaluations
	Between planner and venue:
	Pre-con with hotel staff
	Tip cards
	Post-con with hotel staff
	Billing instructions
	Confirm that enough space is provided for meals.
	Set up office.
	Test printers, copiers and high-speed connectivity.
	Set up shipping area for participants.
	Confirm general session/breakout requirements for A/V.
	Assist with rehearsal for A/V.
	Pack supplies/ship.
	Meet with hotel contacts for meeting updates.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



	Ask hotel staff assistance in getting participants into sessions after breaks and meals
	Review charges/bill and sign off.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



On-site checklist:

	Insure that specs and BEOs are accurate.
	Review rooming list.
	Check on VIP rooms.
	Coordinate with guest services delivery of amenities or other gifts.
	Request keys for all rooms that must be secured.
	Conduct pre-con meeting and tour with hotel and other staff.
	Conduct pre-con meeting with the on-site meetings team.
	Ensure that walkie-talkies are available and operational.
	Document numbers for catering, sales, A/V, other important numbers.
	Review classroom setup for room numbers, space, A/V, special requests.
	Confirm that shredders are in place.
	Confirm that F&B meets specs, quality, temperature, variety and that labels are used for allergies, etc.
	Confirm that special meals/dietary requirements are met.
	Confirm that enough space is provided for meals.
	Set up office.
	Test printers, copiers and high-speed connectivity.
	Set up shipping area for participants.
	Confirm general session/breakout requirements for A/V.
	Confirm that A/V, production presentations, if required, are error-free.
	Run rehearsals with speaker/production company if required.
	Communicate changes with A/V, production as required.
	Pack supplies/ship.
	Meet with hotel contacts for meeting updates.
	Ask hotel staff assistance in getting participants into sessions after breaks and meals.
	Review charge /bill and sign off.

Notes:

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



Post-meeting:

	Conduct post-con.
	Debrief with customer.
	Post debrief form in meetings file.
	Send meetings team survey to meeting sponsor.
	Ask meeting sponsor for copy of completed participant-survey synopsis or analysis (specifically on meetings components).

Financial:

	Submit additional deposit request(s).
	Enter cost avoidance in profile.
	Accrue or pay 90 percent or pay 100 percent.
	Prepare, send and post after-meeting analysis report including actual costs compared to budgeted costs.
	Update program profile with all relevant information.
	Reconcile all invoices.

Reporting:

	Extract all metrics from the reporting systems, which may include the meeting-management technology, the travel-management company reports, the T&E system, the compliance system, etc.
	Create reports.
	Calculate the return on investment.
	Analyze reports.
	Create report synopsis, and identify opportunities for improvement.
	Distribute reports.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



Timeframe (Small to Medium sized events)

4-6 months before meeting:

Identify the purpose and objectives of the meeting; determine if there will be a meeting theme.

Develop the budget; review past meetings for historic spend information.

Identify the location and venues; send out RFPs, select and contract with venue (using professional legal review or review by a professional meeting planner).

Identify speakers, ground transportation supplier, entertainment and off-site activities.

Develop preliminary agenda.

Identify resources who can help you, and prepare them for upcoming tasks that will need to be accomplished.

Identify the number of attendees, and begin collecting their information (name, phone, email, etc.).

Determine if your meeting will use a mobile app; if yes, select supplier and begin development.

Identify ways to promote the meeting, if applicable.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



2-3 months before meeting:

Finalize agenda.

Develop the meeting registration website (agenda, venue, transportation information, activity selection, etc.).

Send invitations or, at a minimum, a “save the date.”

Determine the deadline for registering for the meeting, but ensure that it is well in advance of the hotel cut-off date.

Confirm speakers, meeting specifications (room setup), food and beverage, A/V, technology.

Develop crisis management plans.

Order gifts or giveaways.

Pay any deposits that are required.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



1-2 months before meeting:

Secure certificates of insurance for activities that may not be covered.

Ensure that all contracts (hotel, A/V, off-site activities, caterers, etc.) are signed and countersigned.

Continually update the budget as necessary, but never delete the original budget; rather, show the budget progression as the meeting progresses.

Update number of attendees and their information.

Confirm that you have provided all details to the speakers, including PowerPoint templates, if applicable, and travel arrangements, and ask about their A/V needs.

Finalize menus and room setups with the hotel and off-site caterers.

Finalize entertainment, off-site activities and décor, if applicable.

Start developing collateral (brochures, registration kits, name badges, etc.).

Obtain signage as necessary for each room.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



1 month before meeting:

Confirm attendee lists.

Provide the attendee travel information (manifests) to the ground transportation company so that they know when to pick up each traveler from the airport. (via SUVs, mini-coaches, etc.).

Confirm rooming lists, and be sure to tell the hotel who should get upgrades.

3 weeks before meeting:

Finalize meeting specifications (room setups, F&B plans, etc.).



JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



2 weeks before meeting:

Finalize collateral, name badges, etc. Recognize that there will always be last-minute changes on-site or the day before.

If you are using seating charts, prepare them. This may be for your seating at meeting tables or even at meals.

Send emails to all parties as necessary.

Remind speakers who will pick them up from airport, where they are staying, rehearsal information, what time they need to be in whatever room they are speaking in, what time they may depart from hotel, where to find car to take them back to airport, how to get reimbursed for expenses, who to contact if they cannot locate their ground transportation service, who to contact in case of emergency, etc.

You might want to provide your attendees with their registration confirmation and a memo with all final details.

You might want to call or email all suppliers to ensure they do not have any questions and that everything is ready to go.

You might want to provide your support staff with information about their roles on-site.

Have boxes shipped to hotel to arrive 1-2 days before meeting.

Arrange for the guest-room deliveries of gifts or meeting materials for all or some attendees, as applicable. You might want to arrange with the hotel to have information/gifts placed in sleeping rooms on the day of arrival.

Reconfirm rooming lists with hotel at final cut-off.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



3 working days prior to meeting:

Confirm F&B guarantees with hotel.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



1 day before meeting:

Run through your checklist and confirm that nothing is missing.

Plan for gratuities (how you will pay, etc.).

Set up office and registration desk (if space permits).

Arrive at hotel to check facility, rooms, boxes that have been shipped, where restrooms are located, etc.

Assemble materials.

Check signage.

Conduct/oversee rehearsals.

Monitor arrivals and departures.

Conduct/oversee VIP meet-and-greets.

Check suites.

Check amenity deliveries.

Ensure that your crisis management plans, meeting information and important phone numbers are in your binder (or on your iPad or tablet). Note: Hard copies are always handy in case of a crisis where electricity might not be available.

If your meeting starts early the next day, it is wise to meet the hotel staff that will be supporting your event on the day before (called a “pre-con,” or pre-conference meeting). Go over all of the details with these staff members to make sure everyone understands all of the requirements.

Meet and brief internal staff and other suppliers.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



Day of meeting:

Bring your binder, checklists, cell-phone charger and whatever else you need.

Arrive early to check on breakfast.

If you did not meet the hotel staff yesterday, meet them today and be sure that everyone has an understanding of the meeting agenda and what is required. Get their names and cell-phone numbers.

Print attendee list alphabetically (and by table, if seating is assigned) and have it ready at the registration desk with name badges.

Bring extra blank name badges.

Request and review hotel reports.

Set materials and supplies in each meeting room.

If you have assigned seating, set up the name tents/tent cards according to seating charts.

Check meeting rooms to confirm they are set correctly.

Connect with speakers and VIPs.

Continuously check F&B services.

Monitor agenda for break times and attendee movement.

Secure rooms while meetings are not in session.

Review hotel invoices from previous days.

Distribute evaluations (paper or technology-based). Note that some organizations send evaluations out a few days after the meeting, if using technology.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



At meetings end:

Collect completed meeting evaluations.

Collect and dispose of confidential materials.

Pack and ship any leftover materials, supplies, items, etc.

Distribute hotel gratuities and thank-you notes.

Monitor hotel check-out.

Manage departures.

Conduct preliminary bill review with the hotel to discuss all charges incurred to date.

Conduct a “post-con” (post-conference meeting) with hotel director to discuss service levels.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



After the meeting:

Conduct meeting/event sponsor debrief.

Review all invoices, and immediately dispute any charges that you do not believe are correct.

Pay the invoices.

Report metrics (forecasted budget vs. actual, etc.).

Write any necessary thank-you notes.



JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



A day in the life.....

I've met many, worked with a number and employed one! Here's a glimpse at a typical day in the life of an meeting planner.

A meeting planner's day starts early and ends late. It is not uncommon for her or him to be checking on rooms, food and beverage service, and A/V as early as 6 a.m. and working as late as 11 p.m. You will be the first person to arrive each day and the last person to leave. For example, if breakfast starts at 7 a.m., you might be arriving to check rooms and buffets as early as 6 a.m. If your dinner/evening event closes at midnight, you will be there to close the event, escort attendees out, verify the beverage consumption, etc. Unless there are many meeting planners assigned to the meeting, expect to work many hours on-site.

Always wear comfortable shoes within dress code.

Be prepared to be accessible 24 hours a day via cell and/or walkie-talkie.

Problems might happen on-site, but it is up to the meeting planner to keep them invisible to the attendee.

Work closely with your hotel, vendors, and on-site support teams to provide direction and support.

Address attendee issues as they arise.

Open and close meeting registration and on-site office according to schedule.

Unlock meeting rooms as necessary.

Check the meeting room (setups, test A/V, IT, electrical equipment, room temperature, registration desk, signage, food service, handouts, badges, sign-in sheets, etc.).

Check in with speakers/instructors. As you are checking meeting room setups, you might have the opportunity to assist your speakers/instructors with last-minute needs. They could need your assistance with minor setup changes, testing a presentation, making copies or just wanting general information.

Review your signage, easels and postings of the directions, meeting rooms, etc. Additionally, hotels and event facilities typically post events internally as well as in their common spaces. They might also have electronic "reader boards" that outline all of the events taking place in their facility that day. These reader boards might run on lobby monitors or on guest televisions. Check these hotel postings for accuracy in times, locations, names, etc. There might be private events that you do not want posted.

Check the buffets regularly. You will want to work with the banquet captains to continually monitor the buffets and food services. Prior to opening doors and serving, walk through the buffets to make sure they are set up for ease of flow and that all contracted food items are set and labeled. Instruct banquet staff to replenish or close buffets only with your approval. If your meeting is scheduled to start in 15 minutes, you might instruct banquets to begin clearing and chime attendees into session. You might choose to keep buffets open later to allow for your internal on-site support staff to eat. You might also request to have certain buffet items brought to your break stations or office. As a conscious practice, you might request to have leftover food donated to a local shelter. Consult with the banquet captains to see which items were most and least popular, so that you can adjust your menus/quantities for subsequent days.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



Refresh and reset rooms during break/meal times.

Position staff in public areas during times of meeting transition to direct attendees to next sessions/events.

Protect the confidentiality of all materials; determine if the materials can be disposed of through the hotel's process, or if shredders/shred bins are required.

Secure meeting rooms when not in session and especially at day's end.

Request daily manager-on-duty (MOD) reports from hotel. These are records of any issues that have happened to a hotel guest overnight. Upon request, a hotel can provide you this information if it is about an attendee of your conference. If an attendee is injured or ill or files a complaint, you should follow up with the guest/hotel accordingly. Any security issues also need to be addressed and potentially escalated/reported.

Request daily in-house, no-show and hotel-occupancy reports. This will help you to monitor attrition, if applicable. Additionally, this will prove useful when trying to locate attendees, speakers, etc.

Conduct a daily bill review and identify any charges in question.



The financials

Because of the multiple hotel departments that issue invoices (catering, housekeeping, IT, etc.), errors are common. Be sure to check invoices carefully and dispute charges that you do not believe are correct. Note that many unexpected line items should have been addressed upfront and specified in your contract. Before the contract is signed, it is important to negotiate the cost of items for simple things like moving boxes, electrical cords, flip charts, Wi-Fi, etc.

1. Review all invoices provided to you.
2. Confirm that all invoices related to your meeting, along with back-up documentation, have been received.
3. Comparison checklist:

Compare the final banquet event order (BEO) to any changes noted on the final invoice provided by the hotel. Review the attendee and food/beverage guarantees submitted to the hotel. On-site, changes may have occurred and, as a result, charges might have been incurred.

Per your earlier instructions to the hotel, charges should be itemized into the following categories:

Sleeping rooms/tax (also itemize for no-shows, attrition)

F&B (also itemize bartender fees/alcohol separate from food)

Meeting room rental (if applicable)

A/V

Telecommunications

Transportation

Misc. (guest-room Internet, business center, power, etc.)

Activities (spa, golf, etc.)

Compare hotel guest-room folios to your rooming list. Ensure that arrival/departure dates are correct, no extended stays or incidentals were added to the master account, room rates are accurate, and any special circumstances for single/double rooms are accounted for correctly. If you received comp rooms, make sure they are deducted from the master invoice. Compare your actual room pickup to the daily room-block occupancy reports; compare the no-show reports generated during the meeting.

Compare the contract clauses to the penalties incurred (attrition, cancellation) to verify any fees incurred.

Compare the meeting-room rental charges to the contracted meeting-room rental to verify charges.

Compare technology/communications charges with the contracted rates, including discounts negotiated.

Compare A/V orders, BEOs and charges noted to the final bill provided by the hotel with the contracted rates, including discounts negotiated.

Compare office equipment rentals outlined on the BEOs or contracts to the invoice to verify rates, amount of equipment and accurate dates. Ensure that discounts were applied, if negotiated.



JAY ALLEN

**PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER**



Review costs of copies, shipping, freight, entertainment, supplies with the contracted rates.

Compare ground transportation manifests and charges to contracted rates, including discounts that were negotiated.

Ensure that deposits have been applied, and subtract this amount when processing the last invoice and payment.

Deduct credits that might have been used from previous meetings or complimentary concessions.

4. Review and confirm that the air transportation costs are accurate.

Post air-cost reports include:

- Passenger name
 - Air routing
 - Departure date
 - Date of charge
 - Billing date
 - Debit/credit indicator
 - Billing amount (including any service fees, if applicable)
 - Charge description
 - Ticket number
 - Air ticket issuer
 - Air carrier and class of service
5. Pay for your meeting or event.
 6. Debrief and identify improvements for the next meeting or event.
 7. Report your success through the use of metrics that might need to be produced.
 8. Store your contracts and documents according to your organization's document retention policy.
 9. Obtain the actual attendance and cost for each function from the venue.
 10. Reconcile and process invoices. Document the estimated budget vs. the actual cost.

JAY ALLEN

PUBLISHED AUTHOR
COMBAT VETERAN
MOTIVATIONAL SPEAKER



And there you have it! Over 45 Pages, over 7,000 words on my guide to ensuring you have the most successful event.

Don't forget to access my **guide to selecting the right speaker(s)** for your event and my **guide to getting the best from your speaker(s)** for your event. <https://jayallen.uk/event-planners/>

I'm Jay Allen, 2 x Global Award Winning Motivational Speaker, listed on the UK 'Clear Business Thinking' POWER 100.

I sincerely hope you find this guide of use. I do hope I may be of service to you by speaking at an event one day soon?



Jay@JayAllen.uk

www.JayAllen.uk

+44 1904 599067