

THE 20 KEY ITEMS ESSENTIAL FOR A SUCCESSFUL MEETING

The Meeting Checklist

Open houses, meetings, conventions, events and workshops are prime opportunities to attract local media coverage. Because these events are such attention getters, you'll want to do everything possible to assure that they "go off without a problem."

Thorough planning and follow-through is the key to the success of these events. Use the meeting checklist that follows to guide your planning.

1. Site Requirements

- Central or convenient location
- Airport nearby
- Adequate public transportation
- Charter buses available
- Restaurants and stores nearby
- Entertainment available
- Recreation facilities nearby
- Exhibit hall available

2. Hotel/Facility Requirements

- Prices within budget
- Good location
- Clean and attractive
- Sufficient meeting rooms
- Adequate sleeping rooms
- Adequate dining & function space
- All rooms air-conditioned
- Sufficient exhibit space
- Adequate recreational facilities
- Audio-visual equipment & support
- Quality food service
- Efficient registration
- Sufficient manpower to service meeting

3. Hotel Contacts

- Convention Manager
- Maitre d'hotel
- Bell Captain
- Banquet/Catering Manager
- Service Manager
- Sales Manager
- Crisis Contact
- Complaint Contact

4. Attendance

- Total members expected
- Total guests expected
- Total number of spouses
- Total number of children
- Grand total

5. Transportation

- Early/late arrivals
- Private cars
- Instructions to attendees
- Buses for tours
- Parking available

6. Dates

- Most of group will arrive
- Most of group will depart
- Uncommitted rooms released
- Registration cut off date
- Arrangements for early/late arrivals
- Arrangements for "no shows"
- Mass or individual billing

7. Guest Speakers and Visitors

- Invitations to local dignitaries
- Acceptance of invitations
- Ticket provided
- Lodging provided
- Transportation arranged
- Welcome arranged
- Nametags prepared
- Honorarium required
- Honorarium prepared
- Thank you letter sent

8. Sleeping Rooms

- Approximate rooms needed:
 - Single
 - Double
 - Suites
- Room rates:
 - Members
 - Guests
 - Spouses
 - Child

Reservation confirmation

9. Complimentary Accommodations

Number of suites needed
Room rates checked
Bars, snacks, complimentary buffets
Flowers, fruit basket, newspaper
Contacts for suite addresses
Check rooms, gratuities
Golf, tennis, etc.

10. Registration

Approximate time required
Registration cards: number & size
Personnel to handle
Number of tables chairs
Ash trays
Typewriters: number & type
Paper, pencils, pens, pins
Signs
Water pitchers, glasses
Number of suites needed
Lighting
Telephones
Bulletin boards: number & size
Cards for guest, family
Name tags
Cash drawers: number & size
File boxes: number & size

Points to Check Just Before Opening

Personnel-understanding of procedure
Necessary information on registration cards, badges
Ticket prices, policies
Location of programs, other material
Policy on single ticket sales
Policy on accepting checks
Policy on refunds
Hospitality desk/room
Duplicate registration lists
Post instructions at convenient spots
Location of tables
Lighting of tables
Wastebaskets

Cards, pencils on tables
Adequate supply of change
Protection of cash

Points to Check During Registration

Presence of administrator to make policy decisions
Policy for registration of members after desk is closed
Provision for checking funds at closing time
Need for removing cash over flow

11. Meals, Receptions, Coffee Breaks

Menu selections and deadline
Make sure we have a firm price-per-plate including tips and taxes (if any)?
Number at head table?
Number at other tables?
Total to be served?
Round, square, rectangular tables
Room arrangement/layout
Minimum guarantee?
Price-per-plate guarantee?
Place cards for tables
Table tents (such as Advisory committee, Honored Guests, Media, etc.)?
Can the room be served easily without disturbance? (Check location of kitchen, entrance and exit doors in relation to head table, other tables, etc.)

Bar facilities (if wanted)

1. Location/Number
2. Arrangements for "by the drink" or "by the bottle" If the latter, do we pay for any bottle opened?

Note: If so, remember opened but unused bottles belong to us. Use later for hospitality.

3. Selected liquors or complete bar?
Deadline for room setup
Are appetizers to be served?
Firm times for coffee breaks, meal service, reception service

Points to Check Just After Banquet

Removal of organization property
Check for forgotten property
Claim slides, movies, gavel, etc.

12. The Meeting Room(s)

Number of rooms needed for general sessions and small group sessions
Are these available?

Conveniently located?
Separate air conditioning/heat controls in meeting rooms?
Size of general meeting room:
Length
Width
Height
Is this adequate (comfortable) for the group if seated as desired?

Seating arrangements

1. Schoolroom style, with table
2. U-shaped conference table
3. Theatre style
4. Head table for how many persons?

Is there space in general meeting room, or just outside, for "coffee-break" service?
Registration table?

Is general session room separated from adjoining rooms by:

Solid wall?
Sliding panels?
Accordion panels?
Can you get noise disturbance from adjoining rooms?
Has it been tested to be sure?
Adequate facilities for audio-visual program:
Front projection
Rear projection

Adequate power to handle maximum needs?

When will principal meeting room be available?

What is the event immediately preceding ours in the room?
Scheduled completion?

Can our equipment be setup the night before a morning meeting?

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Note: Avoid a tight schedule. If another group has the room from 9:00 A.M. to 12 noon, and you're due to start at 1:00 P.M. there is little likelihood the room will be ready for you.

Is one room to serve both for general meeting and luncheon or dinner?

Note: If "yes" avoid it! particularly if you're expected to recess at a stated time to permit conversion. However, if room is big enough to permit both a meeting and meal setup, make sure table setting is done in advance of meeting and that then will be no table setting during program.

Seating of guests planned?
Guests at one location, or mixed with others?
Seating plan(s) designated?
In the room
At the registration center
In advance notices
Room setup diagram provided

Points to Check Before Meeting

Check room operation
Seating plan as specified
Location of additional seats
Room temperature: optimum heating/ cooling?
Lectern and light, microphone
Water provided
Ash trays, matches, pencils, note pads, paper
Location of restrooms
Signs, flags and banners placed correctly
Special flowers and plants
Other special facilities
Direction signs - Photographer present

Points to Check After Meeting

Removal of organization property
Check for forgotten property
Billing arrangements
Take down signs, banners, etc.
Recovery of films, slides, etc.

13. Specific Equipment at Facilities -- Other Than Audio-Visual

Signs: Registration
Directional
Welcome
List of equipment needed
Price of equipment to be furnished
List of equipment to be rented
Union clearances
Repair kits (pliers, bulbs, wire)
Decorations (meet fire regulations)
Dressing rooms required
Reproduction equipment
Garage and parking arrangements

Other equipment
Cost of extra equipment or services
Telephones, number
Flags, banners
Photographer
Radio and TV broadcasting; Cable
Rental equipment contact

14. Pre-Meeting Audio-Visual Checks

Acoustics: Clap your hands sharply . . . talk loudly...listen carefully
Audio: Plug in everything, and then test it

1. Public address system working?
2. Feedback at working level?
3. Electrical interference or hum?
4. Speaker placement OK?
5. Enough PA mikes?
6. Mike cords long enough?
7. Mike stand heights OK?
8. Tape recorder working?
9. Recording mike tested?

Booth or Projection Station -- do you have to erect a stand or move a table? If so, be sure it's sturdy also:

1. High enough to clear heads/hats?
2. Wide enough for all equipment?
3. Right distance from screen?
4. Rigid and level?
5. Enough AC electric power?
6. Circuit breakers or fuses located?
7. Spare fuses/standby circuits ready?
8. Enough extension cords or adapters: AC Power? Audio? Remote Control?
9. Intercom system tested?
10. Signal light or buzzer needed?

11. Emergency work light ready?

Lectern -- Put yourself in the place of dignitaries

1. Height comfortable?
2. Script light tested?
3. Glare eliminated from stage lights or spots?
4. Mike placement OK?
5. Pointer handy?

Room lights -- Don't take anything for granted. This is one of the biggest causes of traffic commotion before showings.

1. All light switches located, checked and labeled?
2. Are power outlets hot when lights are out?
3. Is the room dark enough for projection?

Will people come and go during the presentation?
Is light from doors prevented from hitting screen?

Estimate how many people will be in the room and how long you expect the meeting to last

1. Will air change sufficiently with doors and windows closed?
2. Will the temperature remain comfortable?
3. All heating, air conditioning and fan controls tested?

Screen -- Know exactly what kinds of materials will be projected, then find out whether the existing screen is suitable.

1. Large enough?
2. Horizontal or square format?
3. Surface appropriate for viewing conditions?
4. Electrical controls tested?
5. Stage curtain controls tested?

Screen -- Put a typical slide on the screen, then go out and sit where the audience will sit

1. Front row no closer than two screen widths?

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2. Is the picture bright enough for people in the side seats? Is it distorted?
3. Will everyone be able to see when seats are filled?
4. Correct lenses to fill the screen?
5. Vital parts on hand: Lamps? Belts? Fuses? Repair kits?
6. Standby equipment ready?

Equipment -- A breakdown can spoil the show. Be prepared

1. Movie Projector:

- 16mm?
- Regular 8mm?
- Super 8mm?
- Tested and working?
- Spare lamp?
- Extension speaker?

2. Slide Projector:

- Remote control?
- Remote extension?
- Focus from remote?
- Tested and working?
- Spare lamp?

3. Filmstrip Projector:

- Provision for sound?
- Tested and working?
- Remote control?
- Spare lamp?

4. Tape recorder:

- Tested and working?
- Built-in speaker?
- Extension speaker?

5. Other equipment:

- Easels?
- Blackboards?
- Chalk, eraser?

6. AC or DC current?

7. Sufficient extension cords of our own to supplement those provided?

A-V Materials--Inspect everything that's to be used the day before, if possible.

- Right subject and title?
- Sequence in program checked?
- Inspected for cleanliness / condition?

1. Films:

Heads out, wound properly?
No breaks/tears/weak splices?
Sound?
Optical, magnetic or silent?
Run down to titles?
Prefocused and framed?

2. Slides:

Sound level determined?
Mounts compatible and straight?
No dirt or fingerprints?
Orientation checked (each slide)?
Magazines tested for jamming?
Prefocused and framed?

3. Tapes:

Heads out, wound properly?
Speed checked?
Tracks compatible?
Cued up?
Playback level determined?

4. Everybody posted, checked out and cued:

All equipment operators?
Light switch operators?
Drape and curtain operators?
Door guards?

15. Organization of Exhibits

Number of exhibits
Floor plans for each exhibit furnished
Date of setup and dismantling
Room assignments and daily rentals
Booth coverage assignments
Models and/or sales representatives
Name of display company
Directional signs/traffic flow
Labor charges: electric and carpenter services
Electrical power, steam, gas, water and waste lines
Electrical charges
Partitions, backdrops
Storage of shipping cases
Guard services
Special effects
Paging system and arrangements
Badge arrangements
Drawing for prizes
Union clearances
Transportation of material to and from
Displayed items clean, polished

16. Entertainment

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For Reception, Banquet, Special Events
Entertainers and orchestra rehearsal for shows
Music stands provided by orchestra or hotel
Variety of entertainment program
Printed program information
Stage or risers needed

17. Promotion of Meeting

Promotion brochures & leaflets
News releases
Other promotional material
Mailing dates setup
First Mailing
Second Mailing
Third Mailing
Feed-back and follow-up

18. Media Relations

Is advance release on meeting wanted? If so, date of release
Advance copies of speeches or presentations wanted? If so, available?
Media conference for person or item of importance?
TV interview?
Radio?
Newspapers?
Trade publications?
Coverage in home-town papers?
Award winners?
Coverage for company house organs on award winners?
Follow-up release on outcome of event?

19. Emergency Procedures

Alternate plan in case of transportation problems
Back-up personnel in case of illness
Replacement procedure in case of theft
Alternate programming in case of of strike
Emergency exit route

20. Miscellaneous

Baby sitters
Sight-seeing trips arranged
Souvenirs, gifts
Car rentals
Recreation Medical services
Lost and found

End