



INCENTIVE PLANNING PROCESS CHECKLIST

TABLE OF CONTENTS

- Objectives
- Rules
- Audience
- Budget
- Location
- Air
- Itinerary
- Site Visit
- Contracts
- Promotion
- Guests
- Operation
- Billing
- Evaluate

The planning of an effective incentive travel program combines the gathering of information, professional analysis and discussion.

Use this worksheet when developing your next incentive travel program.

INCENTIVE PLANNING AND PROCESS CHECKLIST

OBJECTIVES: A clear statement of purpose.

- Why are we offering the incentive trip?
- How will we measure its success?

RULES: We must make it clear to our audience what they have to do to qualify or to attend this program.

- What are the rules?
- Are they easy to understand?
- Is it open or closed-ended?
- Will there be multiple tiers?
- Must you have a particular job description or title to attend?
- Will it be by invitation or qualification?
- Can one buy-in?
- How will they know how they are doing?
- Can education credits be earned?

AUDIENCE: We must identify who we are trying to reach.

- Who are we trying to motivate?
- What is the profile of the typical guest?
- Are they mostly couples?
- How many do you expect to qualify?
- Will children be encouraged to come?
- How well traveled are they?
- What is the average income?
- What is the typical job title?

BUDGET: Decisions must be made regarding the funding of the program.

- How much do you want to spend in total?
- How much per person?
- How much have you budgeted for promotion?
- Will it be funded as a percentage of total sales or as a percentage of incremental sales?
- How much will show up on their W-2?
- Will suppliers be funding a portion of the event?

LOCATION: Where are we going to take them? Not all destinations are created equal. Some will generate better results for your target audience.

- What destinations / resorts have you been considering?
- Where have you gone in the past?
- Where is your competition going?
- Any destinations you absolutely will not consider?
- What time of year are you willing to travel?
- What activities does the destination offer?
- Would a package save time and money?
- Does it have the meeting space we require?

AIR: A big portion of your budget and the most unpredictable are the airfares. A professional air analysis comparing equally attractive destination choices will allow you to save money by selecting the destination with the best average airfare.

- What cities will your guests be coming from?
- How many?
- How far can they be asked to drive to a designated airport?
- Can we get everyone there in time for the Welcome Reception?
- Should we use zone fares, a non-refundable group contract, charters or regular scheduled air?

ITINERARY: Itinerary development is an art. When the unique aspects of a destination are combined with the personality of the group you have a winner!

- What itineraries have worked well in the past?
- How much free time do you allow?
- How many activity choices?
- What are the meeting requirements?
- Are breakfast, lunch, and dinners included?
- Do you hold a formal awards banquet?
- Are there any established traditions?
- Any tournaments?
- How many days should you be there?
- Can this be done within the budget?

SITE VISIT: Video production and internet technology can help you decide on the destination but it can't replace physically inspecting the destination and the properties being considered.

- Which hotel or resort is best suited to the group?
- Which offers the best value, rooms, amenities, location, activities on site and nearby, security, pool, beach, golf, spa, and culture?
- Which destination and property just feels right for our people? Should you call references?

CONTRACTS: Supplier contracts are very complicated and require careful review. We suggest key hotel clauses be reviewed prior to the site inspection.

- What does their contract say about attrition and cancellation, room upgrades, meeting room charges, amenities, service charges, phone charges, and future surcharges?
- What about the DMC contract, the AV contract, and the entertainment contract?

PROMOTION: It is critical to the success of the program that it be promoted aggressively.

- How and when do you want to announce the program?
- How often do you want to promote the trip during the qualification period?
- How will the meeting be announced and registration handled?
- Will a web-based communication site be developed?
- Are there meetings during the year that need materials to promote the trip?
- Should we mail materials to the home?

GUESTS: Before, during, and after the program we will represent you to your guests.

- How do you want us to answer sensitive questions?
- What travel extension options would you like us to make available?
- What flexibility do we have to improve their air schedule at an additional ticket price to you?
- Who do we refer them to if we don't have the authority to solve their request?
- Who are your VIP's?

OPERATION: We sweat the details on site so you spend the majority of your time with your guests.

- Will you have any of your team at the hospitality desk?
- Who should have signing privileges on the master?
- Who are the VIP's?
- Will a manager be assigned to every group activity?
- What time each day will we have our review session?

BILLING: We reconcile the billing from all the contracted suppliers and produce a final detailed summary with back-up for your review.

- Were there agreed upon credits from the hotel?
- Did we get charged for the correct number of participants on each of our group activities?
- What charges are the guests responsible for?

EVALUATE: You won't know if the program met its objectives if you don't evaluate the results.

- Who will create, distribute, and collect the guest survey?
- Did sales increase?
- Did we get the number of guests we were hoping for?
- How many first time guests did we have?
- Did we meet the overall objectives for the program?
- What could be done better next time?