



SALES MEETING PLANNING PROCESS CHECKLIST

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The planning of an effective meeting combines the gathering of information, professional analysis and discussion.

Use this worksheet when developing your next meeting.

SALES MEETING PLANNING PROCESS CHECKLIST

OBJECTIVES: A clear statement of purpose.

- Why are we planning a meeting?
- How will we measure its success?

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

- Must you have a particular job description or title to attend?
- Will it be by invitation or qualification?
- If they must qualify what are the qualifications?
- Will there be a cost to attend?

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

- Who are we inviting to attend?
- What is the profile of the typical guest?
- How many do you expect to attend?
- If employees are they expected to attend?
- Mostly male, female or percentage of each?
- Will there be international attendees?

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 the announcement? Will it be funded by multiple departments such as:
 - Sales
 - Marketing
 - Human resources
 - Education

LOCATION: Where is it going to be held? Not all destinations are created equal. Some will generate better results for your target audience.

- What destinations / hotels have you been considering?
- Where have you gone in the past?
- Any destinations you absolutely will not consider?
- What time of year are you considering?
- What activities does the destination offer?
- Does it have the meeting space we require?
- Will they be driving or flying?

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 meeting requirements and the personality of the group you have a winner!

- What itineraries have worked well in the past?
- How much free time do you allow?
- Any free time 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 transportation contract, the AV contract, and the entertainment contract?

ANNOUNCE: It is critical to the success of the program that it be communicated effectively.

- How and when do you want to announce the meeting?
- How often do you want to remind them?
- How will the registration be handled?
- Will a web based communication site be developed?
- Are there meetings during the year that need materials to promote the meeting?
- 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 surveys?
- 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?