

What to Look for in a Meeting Management Application:

>> A network solution that provides access among department members.

>> A shared calendar function that allows staff to post planning and site visit schedules.

>> A task management function used to record and track the status of meeting management to-do items.

One of the many benefits of computerization is greater time efficiency. By making daily and consistent use of a task management module, you derive two benefits. First, you can standardize the sequence of tasks team members should follow when doing their job. Second, you can output time management reports to show gains in efficiency.

>> A budgeting function for tracking both income and revenue, along with budget planning and reporting features. Exportability into a spreadsheet application such as Microsoft Excel is recommended.

>> A vendor management module for maintaining contact information on key vendors. This function is best if integrated with your address book, enabling ease in e-mailing contacts.

>> A session planning module for identifying the unique requirements for individual sessions within a meeting. Here, items such as audiovisual needs, room set-up requirements, and food and beverage information can be recorded.

>> A robust reporting utility. Core reports should be available, with options for added customization — either within the reporting utility or through linking into Microsoft

Office or other suite products.

Added functions, depending on your department's role in planning and implementing meetings and conferences, include these modules:

>> A module for managing registration is usually a core need. Requirement for this function will vary greatly, depending on the nature of your organization. Specific requirements for this feature are found in Chapter 2 of this guide.

>> A travel booking interface will be required by some planners. Again, specific needs will vary greatly among organizations. Some planners will need to record simple manifest information, such as arrival and departure times and itinerary information. Other meeting professionals will require a direct interface into a travel management application.

>> Housing requirements, such as block management and reservation processing, may also be called for by your organization. Functionality offered by third-party vendors differs greatly, as will your specific needs. (Review the housing section in Chapter 2 of this guide.)

FEATURES AND FUNCTIONALITY

Knowing how to manage both the project and your event team is essential to planning and implementing a successful event. Meeting technologies available in today's market provide many opportunities for meeting managers to monitor, forecast, and track plan-

ning efforts within their team and throughout an organization.

The leading challenges for most meeting managers are the temptation to micromanage staff and ineffective communication with senior management. When staff is provided with measurable meeting objectives, budgeting criteria, and reporting requirements, along with a conduit for ongoing communications, managers can stay removed from micromanaging each and every aspect.

Your position as a manager is to provide a structure and leadership framework for your staff and to serve as a translator of department activities into overall business strategies and core organizational objectives. Whether your department is designed solely as a cost-centered service or as a revenue-generating center, your operations must be cost-efficient.

Here are some tips and suggestions for managing teams and communicating to management possible options for adopting appropriate technology.

>> Use project management software to outline core project needs and resources.

>> Learn how to draft a Gantt Chart. This project flow chart can be helpful in identifying resource demands and time restrictions, and for defining a project's critical path.

>> Set measurable objectives for each functional process, to document work flow, cost-saving, and ROI. Consider such items as number of meetings per staff member, cost per attendee, dollars saved through negotiation, and number of registrations processed. Each process should have one to three critical success measures, which should be tracked and graphed monthly.

>> If your team is spread over a geographic area, then a collaborative application can be useful in sharing and developing project information in a virtual environment. Applications

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During your product review, don't forget about factoring adequate product training, support, and 'errors and omission' insurance.

This last item will protect you should the developers forget a critical security check or cause a catastrophic data event.

such as E-Room, Net Meeting, and Web Ex can all be used for conducting these planning sessions.

>> **A team calendar is absolutely essential.** Deployment can be done across the World Wide Web using such applications as those offered by WeSync.com, or coordinated through suite applications like Microsoft Outlook.

>> **Become adept at spreadsheet programs,** such as Microsoft Excel or Lotus 1-2-3. As a manager, you should understand how to construct a pivot table, tabulate and graph survey results, prepare detailed and summarized budgets, and provide a department "dashboard" on your goals and critical success measures as they relate to your organization's strategic business plan. You should also have a series of control worksheets for tracking ongoing attrition charges, attendance curves, and department cost-savings efforts. These control sheets actually form the data for your dashboard.

MEETING BUDGETS AND FINANCIAL MODULES

When assessing whether or not a meeting management application will deliver needed tools, don't overlook the budgeting and finance function. Remember, the language of senior management is financial-based. Hence, any application needs to have a strong budgeting toolset. Budgeting modules need to be robust and able to integrate with established spreadsheet applications or organization accounting packages.

Several applications on the market will provide a basic set of budgeting tools. These primarily provide options for revenue tracking for individual events, and some will offer the ability to compare expenses across events. Unfortunately, most applications do not consider the management reporting responsibility required of meeting professionals when designing their applications.

A good budgeting or finance module will contain the following:

>> **The ability to create accounting or GL codes** for tracking expenses back to internal departments or divisions, independent contractors, and/or vendors. Codes can simplify the data exchange between a meeting manage-

ment application and an organization's accounting package.

>> **An electronic check or payment request form** linked to a vendor management profile. Such a form will help track essential details, providing a snapshot of expenses by vendors and expense details.

>> **Reporting flexibility.** This allows the creation of both summary budgets and detailed line item budgets — a forecast of expenses by meeting, vendor, and location over time.

>> **The ability to reconcile an expense budget with actual expenditures,** i.e., reporting plan vs. actual numbers.

Some of the field detail you would look for would include:

- Vendor name.
- Payment type.
- Item description.
- Quantity.
- Payment amount.
- Total meeting budget.
- Total actual spend.
- Total travel spend.
- Multiple internal account numbers.
- Signing authority.
- Estimated cost of meeting.
- Transaction date.
- Event name.
- Event dates.
- Planner.
- Facility name.
- Facility city.
- State.

Reports might include detail line items:

- Total expense by category.
- Summary budget.
- Deposit tracking.
- Transportation costs.
- Lodging costs.



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EVALUATING YOUR MEETING

More than likely you will not find an application that will cover all of your needs. Let's face it: Each of us plans our meetings using different processes and tools far beyond the ability of most applications. What, then, to do?

Among the recommendations:

>> **First, take stock of your own department or individual processes.** A process map is a useful tool to literally map out the action steps you take when planning and implementing a meeting. Whether you use a map or develop a list of action steps, be certain to note numbers of transactions and the reporting format at each step along the way.

Your objective at this stage is to identify the steps you take, the number of times you do a step, the internal cost involved in each step or in each group of steps, and how much

time is spent on each step. The end result will be a clear identification of those areas consuming the most resources. (The tracking of numbers and costs at this point is important. These metrics will provide you with a baseline from which to evaluate a technology solution.)

>> **Pull all of the reports or printouts you use; determine how often they are used and whether they are even required.** Save the reports you truly need, as these will help in identifying the fields to use within an application.

>> **Develop a spreadsheet with the following criteria noted on the left-hand column: Function/Process — such as registration and travel management.** Underneath each function/process begin listing the features you need in order of priority. Finally, using the reports you've identified as essential, list the fields under each function/process/feature area.

It is absolutely critical that you involve your team of users during this step. The introduction of a new application will force new procedures that will affect each user. Also, interview the users of your reports and ask exactly what information is useful and what is not.

>> **Identify a budget and what results you need from the system.** Include these on your spreadsheet.

>> **Now you are ready to look at products.**

>> **Using the spreadsheet you developed, you can score each product on its ability to address the needs you've identified.** Take your time at this step!

>> **Ask each vendor for three references and talk to each of the references about their specific use of the application, the service standards of the vendor, abilities to customize the application, and how they like the product.** What additional product features would they want the product to have? ■

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Psuik said. "We don't know how many people decided not to come to protest when they saw how much work we did in advance."

Meeting planners are much more candid now about what they've experienced — e-mail, mail, and bomb threats, or disgruntled employees — and volunteering such information. "How do you want your guests to feel coming into a facility?" asked Psuik. "We won't necessarily tell you about all the things we do to maintain a safe environment, but we do them anyway." He cited such examples as checking bills of lading so that no truck comes in without one, making sure service contractors have badges on at all times, and locking down parts of the facility that are not open to activities.

Hotels, as well, are public buildings that "don't close because

you have a meeting," said Joseph Terzi, Starwood's regional vice president, operations, Southern California, Sheraton San Diego Hotel & Marina. Planners, though, are asking security questions in their proposals, whereas a few years ago "security was a one-liner in a contract," he added.

It is common for planners to spend time with the director of loss prevention (which encompasses security) at the San Diego Marriott Hotel & Marina. "He is very knowledgeable from a safety standpoint about everything on property, and can document in writing the safety procedures for everything from a bomb scare to an earthquake — and provide duplicate plans," said Harold Queisser, market director association sales.