

# Tips for Planning the Perfect Meeting

# 10 Tips for Planning the **Perfect Meeting**

There's an old adage that goes "When you fail to plan, you plan to fail." Those words are particularly appropriate when it comes to planning a professional meeting. After all, ensuring that every detail clicks into place is the hallmark of any successful meeting.

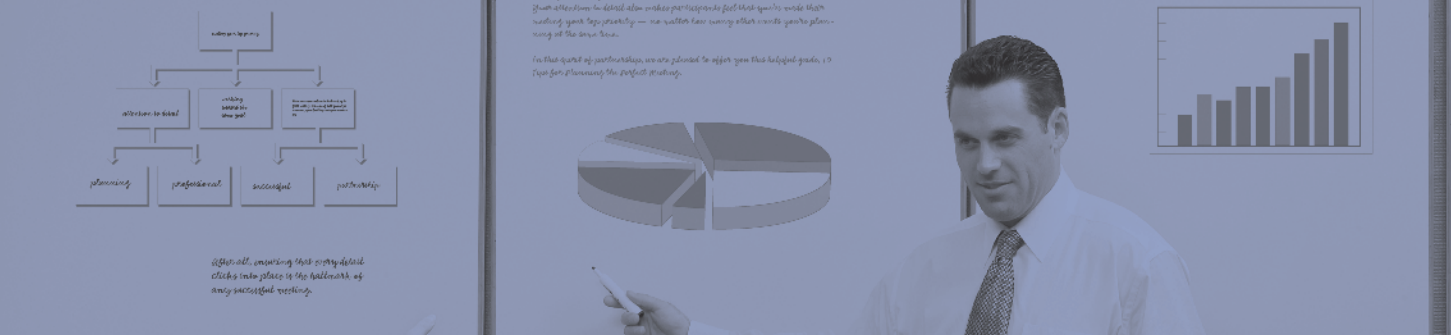
Your attention to detail also makes participants feel that you've made their meeting your top priority — no matter how many other events you're planning at the same time.

At the St. Edward's University Professional Education Center, we believe in creating a partnership with the meeting and training coordinators who rent our space. We've seen time and again that the key to great meetings

is ensuring that your organization, your facility and your vendors are working toward the same goal.

In this spirit of partnership, we are pleased to offer you this helpful guide, *10 Tips for Planning the Perfect Meeting*.





## Tip #1: Know why you're meeting

Step one in planning a great meeting means first **knowing why you're meeting**. What's the purpose of the meeting and the goals you want it to achieve? Knowing this critical information will largely determine the kind of environment you will need for the event.

For example, is this gathering for training purposes? If so, is it the kind of training that will require a computer on every desk, such as information technology training? Or is it a corporate meeting, where you might need the room setup so all participants can see each other?

## Tip #2: Know your requirements

Once you know the type of meeting you need, it's time to get right down to it and plan the logistics. First, decide on a primary contact — the key person responsible for communicating with the facility, vendors, client and other stakeholders. Assigning just one person for this task means less gets lost in the shuffle when it comes to important details.

Second, who's your audience? The purpose of the meeting will likely determine your audience and attendees. For example, if it's a conference for a particular industry or line of business, you'll tailor attendee needs based on history of past events, or from talking to the main client contact about what attendees expect.

If it's a multi-day training, attendees may need access to specific technology or materials. Clear and concise communication with the main meeting contact is crucial to ensure you're providing what attendees will need.



## Tip #3: Determine the event logistics

Logistics make the world go 'round, and that's definitely the case in planning a successful meeting. First consider the size of your meeting. Get as close as you can in estimating how many people will attend.

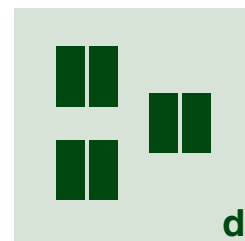
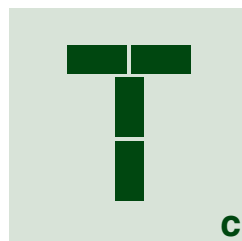
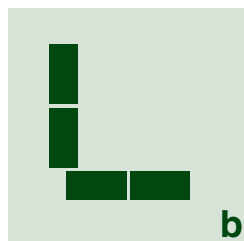
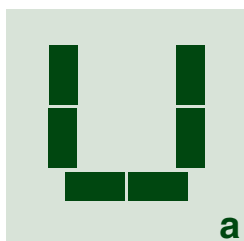
**Registration** is an important first impression with attendees. Decide how to handle early, on-site and late registration — and who will be in charge of those responsibilities, or if your vendor can help with them. Also, will the meeting cover proprietary information, as in training for a technology company where trade secrets will likely be discussed? Can the facility help ensure electronic and physical privacy? If security is an issue, will attendees be required to wear a badge? What other arrangements might you need?

**Room setup** is another crucial consideration, since there are many configurations available, such as U-shaped, L-shaped, T-shaped or pods. You'll also want to consider whether you need desks with computers for training, rows of seats for professional meetings or breakout rooms for workshops — just to name a few.

Next, think about the **technology** you need. Will you need recording and projection services and Internet access? Can the facility provide technical support if issues emerge?

And what about **catering**? Can your facility provide meals, snacks and beverages? Other catering considerations include:

- The number of meals and breaks you'll have
- Dietary restrictions: Plan to provide those to the caterer or facility
- Menu preferences
- Seating arrangements



**a:** U-shaped

**b:** L-shaped

**c:** T-shaped

**d:** Pods

## Tip #4: Decide on a reasonable budget

Once you know the logistics of the event, you'll come up with a budget — and decide where to scale back and where to hold firm.

Consider the kind of meeting you're having — and how many people will attend. A multi-day conference will have more financial impact than a one-day professional meeting or training seminar. Above all, consider both facility costs and food costs, and plan to get competitive bids.

## Tip #5: Choose the right location

Just as in real estate, **location, location, location** applies to a successful meeting. Getting out of the office can be a way to inject a big dose of creativity and encourage employee brainstorming. When deciding whether or not to meet **on-or-off-site**, it helps to go back to square one.

Look at your original meeting objectives and logistics: consider how easy it is for attendees to travel there. Certain cities like Austin have become so popular for meetings and conferences that airlines are offering more flights to these destinations.

## Tip #6: Pick the facility

Once you've chosen the right location, it's time to choose the right setting. The meeting environment can mean the difference between a successful, energetic audience and one that's falling asleep in the chairs.

Take a look at cost and convenience. What is the facility offering and at what price? How do amenities and service compare? What business services will be available to you for computer use, printing, copying, wireless Internet access and faxing? Then, consider the facility's convenience factors such as free parking and proximity to area attractions, hotels, restaurants and shopping.

Once you've identified facilities that meet all your requirements, the choice often comes down to one thing: how easy it is to work with the facility. Will its staff be as invested in your meeting's success as you are? In the end, planners need a partner they can count on in a crunch.

## Tip #7: Plan for pre-meeting, day-of and day-after logistics

Ask if a facility point person will be available as your contact

during the event for last-minute questions and changes. Create and use checklists so nothing is left out during the planning process — and especially during the event, when things get especially hectic. Or better yet, ask the facility if it has a checklist or forms that you can use. Finally, plan for a debriefing with facility staff, planners and your organization to assess the results.





## Tip #8: Decide on an agenda

A solid agenda is your roadmap to a successful meeting, telling you where to start, who will speak, when to take a break, and when to end.

Once you've chosen a theme or topic that aligns with the event's purpose, you'll need to identify and invite speakers, trainers and facilitators. Decide when meal and snack times will happen, as well as any after-hours networking events, if applicable.

Gather your event team and consider roles: Who will do what and when? For example, you might have a **team leader** who ensures the meeting is accomplishing the overall goals you've set in the beginning. You also may need a **scribe** to write down ideas and the results of brainstorming for future discussion. Decide how your team will fit into the agenda to ensure everything runs smoothly.

### Pre-Meeting Checklist:

- Determine meeting goals and objectives**
- Set preliminary budget and establish registration fees and policies**
- Identify possible dates for the meetings, keeping in mind that flexibility will help in locating the right space and getting the best value**
- Decide on space (general session, breakout rooms, etc.), food and beverage, and audiovisual requirements**
- Research venues that will meet your needs, narrow down sites, schedule site inspections and start cost negotiations**
- If necessary, develop a communications strategy to promote the meeting, solicit event sponsors and compile mailing lists for potential attendees**
- Invite and confirm speakers.**
- Determine the final meeting program and agenda; design the conference program, if necessary**
- Confirm and finalize needs for the site, audiovisual, catering, and space; schedule preconference meetings with staff and suppliers to confirm event details and schedule**
- Process registrations**



## Tip #9: Know how to keep the meeting on track

There's nothing worse than a meeting that drags on forever — and the sounds of hungry stomachs grumbling for lunch. Keep your meeting on track by assigning moderators (in the case of panels); timekeepers (in the case of professional organization speakers); and instructors (in the case of training/workshops).

The people in these roles are crucial. Ideally, they'll be experienced at keeping meetings and events on track. That's to your benefit because that attention will likely reflect in positive post-event evaluations.

### Meeting Day Checklist:

- Set up the conference headquarters and information desk to handle last-minute requests and details**
- Confirm audiovisual, catering, equipment rental, and attendee transportation to and from events, if necessary**
- If the meeting runs more than a day, meet daily with staff and, if necessary, site contacts to go over each day's event details and requirements**

## Tip #10: End the meeting on a high note

At the end of a meeting or event, you want to see an audience or a group of attendees who are happy, enlightened, energized and glad they made the time to attend the event.

Whether it's scheduling a final speaker who's also a professional comedian, staging a drawing, or asking facility or event staff to provide special end-of-day refreshments for attendees, end your meeting or event on a positive note that will have attendees excited about the next one.

Distribute evaluations the morning of the last day (or at mid-morning if it's a one-day event), so that you don't lose anyone who may have to leave early. Have moderators, facilitators and others involved make announcements throughout the event that attendee feedback is important and welcome — in planning future gatherings. Follow these steps, and you'll have planned the perfect meeting.





## Facilities comparison: Professional Education Center vs. Other Facilities

The St. Edward's University Professional Education Center has many advantages over hotels, conference centers and resorts/country clubs. Here's a comparison to help with site selection for your next event.

	<b>Professional Education Center</b>	<b>Conference Centers</b>	<b>Resorts/ Country Clubs</b>	<b>Hotels</b>
<b>Turnkey services with no hidden costs?</b>	<b>Yes</b>	No	No	No
<b>Catering?</b>	<b>Yes, onsite</b>	Usually outsourced	Yes, onsite	Yes, onsite
<b>Access to technology?</b>	<b>Yes, Wireless Internet and computers for training needs</b>	Business centers only for fee; other resources usually outsourced	Usually outsourced	Usually outsourced
<b>Classrooms?</b>	<b>Yes</b>	No	No	No
<b>Large meeting spaces?</b>	<b>Yes, many with flexible floorplans</b>	Yes	Yes	Yes
<b>Training?</b>	<b>Yes, university professionals and trained staff can handle your outsourcing needs</b>	No	No	No
<b>Central location to services?</b>	<b>Yes, shopping, postal services, banks nearby</b>	Varies	Varies	Varies

[www.pec.stedwards.edu/facilities](http://www.pec.stedwards.edu/facilities)



## Learn more

If you would like information about how we can help make your next event a success, please visit [www.pec.stedwards.edu/facilities](http://www.pec.stedwards.edu/facilities). Or give us a call at **512-346-8110, ext. 422**.



9420 Research Boulevard  
Echelon III  
Austin, Texas 78759