

## Meeting Planning Scope of Services

### **Meeting Management:**

- Direct liaison with designated Client representative and selected meeting/event owners, as appropriate, for direction and input with each meeting.
- Attendance at organizing and sub-committee meetings (either in-person or via conference call), as requested.
- Direct contact and associated responsibilities for all venues for meetings programs including site research/selection, recommendations, contract negotiations and adherence to contract deadlines.
- Develop timelines for meeting elements; may include, but not limited to: hotel or site contract, per suppliers such as AV, breakout sessions/workshops, hotel attrition, and budget.
- Coordinate all vendors providing goods and services as contracted by PFI on behalf of Client; i.e., according to written, specified orders, timelines and scheduled deliveries.
- Provide dedicated meeting and/or events professionals to service account throughout planning process as well as to provide experienced on-site manager(s) to manage all details, including deliveries and set-ups, installation, event and breakdown.
- Interface with Client-designated person/team regarding registration process – save the date, registration packets and personnel, badges and equipment, as needed.
- Manage all on-line registration/produce detailed reports/interface with properties
- Develop creative strategies to engage attendees and assist meeting owners in achieving their meeting goals in line with budget parameters.
- Direct liaison with selected event/meeting venue after completion of site inspection(s) and contract signing.
- Ability to book all travel-related functions: flights, ground transportation, and hotels for groups or individuals at [www.planningfactory.com](http://www.planningfactory.com)

Comprehensive Spend Management analysis is something that PFI provides to each client. All financial accounting will be tracked and shared with the Client-assigned team throughout each meeting/event.

### **Financial:**

- Provide comprehensive budget development covering all meeting elements and break-even analysis to determine appropriate conference fees, if necessary.
- Provide recommendations for registration fee structures, payment methods, terms and conditions of cancellation, etc, as determined if needed by Client.
- Negotiate for best value with all suppliers on behalf of client. Provide contracts to Client for signature along with providing information on contract deadlines that could affect discounts and/or penalties.

- Provide on-going budget monitoring/reporting throughout the planning process.
- Provide accounting reconciliation through post-conferences meetings with venues to review master account(s).

**Marketing:**

- Interact with any existing Client marketing staff to perform as a team in servicing the same client with the same goals.
- May consult on design and printing of registration flyers and other collateral pieces; distribute as needed for the meeting or event.
- May suggest order and distribute any promotional imprinted items for client meetings as requested.

On-site production is one of PFI's strongest areas. Working directly with each venue and the contacts wherein, PFI will oversee every install, onsite rehearsal, food and beverage selection and logistical flow of each meeting and event.

**Production:**

- Provide overall comprehensive planning, coordination, logistics development, meeting management and production services, including client/host liaison communications and meetings.
- Conduct site inspection(s) of all venues for booking purposed for meetings. Build relationship(s) with point-of-contact person at each venue.
- Provide client with copy of PFI's event insurance coverage of general liability and professional indemnity.
- Finalize and oversee all catering selections throughout the meeting/event; inform client of any changes and resulting financial impact.
- Provide speakers with pertinent meeting/event logistics information and have personnel to assist onsite, as needed.
- Offer PFI Destination Management Services as needed (under separate contract and billing).
- Define need for, design and produce, any necessary signage; or collaborate with Marketing team.
- Coordinate gifting and/or amenities fulfillment as requested.
- Select, coordinate and liaison with Audio Visual (equipment/technicians) company throughout meeting; bundle AV needs to save costs.
- Design and produce CAD layout for specific programs, as required.
- Coordinate deliver/return of conference materials as required.

To effectively close each meeting or event, PFI will meet with each venue and contacts wherein to review final billing and account reconciliation and debrief all service(s) rendered.

**Post-Production:**

- Debrief meeting schedule, plans.
- Account(s) reconciliation.
- Assist in development of following year's meeting program/goals.