



GENERAL SCOPE OF SERVICES DETAIL

Event Management

- Direct liaison with the selected meeting/event Committee members, as appropriate, for direction and input
- Attendance at organizing and sub-committee meetings, as requested
- Develop timelines for meeting/event elements; to include, but not limited to: budget, break even analysis, sponsorship fulfillment, if included
- Direct contact and responsibilities related to all venue(s) for meeting/event program
- Coordinate all vendors providing goods and services as contracted by PFI; i.e., according to written, specified orders, timelines and scheduled deliveries
- Provide a dedicated team of meeting and/or events professionals to service account throughout planning process as well as to provide a team of experienced on-site event managers to manage all details, including deliveries and set ups
- Provide assistance with registration packets and personnel, badges and equipment, as needed

Creative

- Develop creative strategies to engage guests and assist client in achieving their event/décor vision in line with image and budget
- Offer value-added, in-kind assistance through PFI-owned items, when available to compliment environment
- Produce Signature Environment to impact guests as envisioned by client
- Introduce concepts to integrate food and beverage selections into overall environment to enhance the total experience of participants, as required
- Suggest and produce Menu card as event information, as appropriate

Financial

- Provide comprehensive budget development covering all meeting/event elements and break-even analysis to determine appropriate conference fees, if necessary
- Provide recommendations for registration fee structures, payment methods, terms & conditions of cancellation, etc
- Negotiate for best value with all suppliers on client's behalf
- Provide on-going budget monitoring/reporting throughout planning process
- Provide accounting for and handle bill payments as part of turnkey meeting or event coordination/operation



Marketing

- Design or otherwise provide appropriate invitation to client-provided list; address and mail if requested
- Recommend use of Logo/Artwork for the meeting/event theme in all promotional materials*
- Help to define Sponsor (Kit) levels and corresponding benefits with client; design and produce for presentation to potential sponsors
- Interact with any existing marketing or ad agency to perform as a team servicing the same client with the same goals
- Design and print registration flyers and other collateral pieces; distribute as needed for meeting or event; manage e-vites, responses; posting of information on website pertinent to event or meeting*
- Suggest, order and distribute any promotional imprinted items for client.

Production

- Provide overall comprehensive planning, coordination, logistics development, event management and production services, including client/host liaison communications & meetings
- Conduct site inspection(s) of all venues booked for meeting/event. Build relationship(s) with point-of-contact person at each venue
- Handle contractual negotiation, signing of contract(s) and liaison with selected event/meeting venue after completion of site inspection(s)
- 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
- Design and produce CAD floor plan layouts for events and/or trade show, as required
- Provide speakers with pertinent meeting/event logistics information and have personnel to assist on site, if needed
- Provide conference photographer and/or videographer for client promotional uses as appropriate
- Provide experienced personnel to perform on site press liaison, if required
- Define need for, design and produce, any necessary signage
- Coordinate gifting and/or amenities fulfillment
- Propose and book appropriate entertainment selections; handle rider(s) as necessary

*using as basis, information supplied by client



Client Provides (Typical Items)

- Historical conference information, including sponsorship details, trade show overview, logistics requests and defined goals for the upcoming meeting/event
- Any essential information related to elements needed for the upcoming program
- Budget information prior to meeting/event
- List of all committee members and other VIP personnel who may be assisting as well as decision makers for meeting/event
- Contact information on pre-selected speakers, including headshot photos and bios for use in collateral pieces, if available
- Attendee list from prior meeting/event
- Any available client-formulated sponsorship packages, if available, to use as basis for developing upcoming conference/meeting/event Sponsorship Kit
- Meeting program information and approved Agenda, if available, to include selected speakers and topics for sessions as well as break-out programs as information base
- Provide mailing lists, along with any additional addresses, to assist with conference mailing/marketing
- Approve Design for conference/meeting collateral pieces, if available.

Typical Client Additions

- Meeting/conference/ event marketing, including collateral pieces and associated PR
- Handle conference manifests; maintain and update
- Optional hands-on staff during event; definitely staff for registration as a Welcome Staff for dinner event
- Speaker selection, scripting, presentations, as needed; all associated event logistics, travel arrangements and check-in requirements
- Define and decide meeting name/theme
- Assist with developing benefits for various sponsorship levels
- Handle all mailings internally
- Update website with event information, sponsors
- Determine and handle any security needs at meeting/event
- Determine and book AV needed for meeting/event event

Post Production

- Debrief meeting schedule, plans
- Accounts reconciliation
- Set goals for next year's conference/meeting, including location, venue, etc