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Guidelines for Planning Successful Meetings

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Planning a meeting or convention at a hotel is not rocket science, but sometimes it can seem just as complex. Follow these guidelines and your next event will be a hit.

Site Selection

When considering a meeting site, the first thought should be the facility. Take time to think about the atmosphere you want for the meeting. Is this a one day board meeting where the attractiveness of the site doesn't matter? Is this a seminar for clients the company wants to impress? Do you want recreation available, such as a golf course, swimming pool or lake?

Dates

Have several dates in mind before calling a meeting site. Seasonal resort areas may require more advanced planning and cost more. Popular facilities book up to a year in advance.

In Madison, meeting space has increased over the years, according to Troy Smith, Director of Sales and Marketing for the Best Western Inn Towner. He suggested that for a large convention over several days, it's important to book up to a year in advance. However for smaller meetings, a room can be obtained with only a day or two advanced warning.

The Basic Information

Aside from the date, Smith said he'd ask the planner for an overall idea of what is needed. Things to consider are your budget, how the set-up is pictured in the planner's mind, the audiovisual equipment needs, the type of food required, the start and end times for the meeting, and whether sleeping rooms are needed.

Smith explained that the meeting set-up could be a typical classroom style, with chairs and tables facing the front. Other options are theater style with only chairs, or banquet style, with large tables. "It depends on the atmosphere you want," Smith said.

Visit the Site

Helen Wick of Black Wolf Lodge and Conference Center in Wisconsin Dells suggests that if you are planning a big meeting, you should tour the property. "It makes a difference if you've seen the area, and what we offer," she said. "You can see what you have to work with." The planner can then know the facility's limitations, and room diagrams can be drawn to eliminate surprises at the meeting.

Another advantage of visiting the site is that the planner can be sure the facility will create the proper atmosphere. "A lot of meeting places in the past had concrete block walls and it wasn't attractive," said Julie Johnson, owner of Wintergreen Resort and

Conference Center in the Dells. She recommended looking for an attractive room with a lot of light, to help the participants stay awake and enjoy their experience.

Lodging

Before choosing a facility, check your requirements for “sleeping rooms.” These are the hotel rooms that the guests will stay in during the event. Smith of the Inn Towner stated that if attendees are coming in from out of town, “typically they will come in the night before the meeting” so they don’t have to drive at odd hours.

The hotel needs to know how many rooms to reserve, and whether the rooms will be booked and paid for by the guests or the company. If enough hotel rooms are booked, the event planner may be able to negotiate a different rate on the meeting and banquet rooms.

Snacks and Meals

In terms of food, Smith stated that an all-day meeting usually has mid-morning and mid-afternoon breaks, and the planner should consider at least providing coffee and rolls in the morning, and soda and cookies in the afternoon.

Meals are usually served in a separate room, so a reservation should be made at the initial phone call. The menu can be planned closer to the event. Options vary per facility, but the basic question will be “buffet or sit down?” Buffets are good for groups with a variety of tastes or if some are vegetarians. You may need certain number of guests for this option, or a surcharge will apply.

Consider using a faculty known for good food if you’re trying to impress clients or provide a certain atmosphere for your employees. The facility may have you choose from a banquet or restaurant selection, or may work with you on a custom menu.

Be aware that additional fees might apply for using bartenders, serving chefs and certain types of seats or chair covers. Also, gratuity and taxes are not necessarily included, so ask about hidden costs.

AV Equipment Needs

Many meetings require audiovisual equipment or presentation materials. As the event nears, the planner should be sure the hotel has the necessary equipment. Wick of Black Wolf Lodge said that most facilities should have the basics, including overhead projectors, screens, slide projectors, televisions, VCRs, video projectors, easels, flip charts, podiums and lapel and hand-help microphones.

She added that if you prefer to use your own equipment, check with the facility first. If you need equipment the hotel does not provide or which is already reserved they can rent it from an outside company.

Billing/Cancellation

The billing process for meeting and sleeping rooms varies by facility, and you'll probably have options which include paying by a credit card, cash or direct bill. A deposit is sometimes required.

In terms of cancellation, planners should discuss this carefully with a facility before signing an agreement. Julie Dorsch, Catering Director at the Heidel House in Green Lake stated that planners "really need to read the cancellation clause in a contract." She added that planners always seem surprised about the conditions when they try to cancel. Dorsch said that assessing cancellation fees is a touchy issue, because she wants to retain their business for the future. Dorsch tries to "wheel and deal to see if I can make them book for another event later that year."

The worst case scenario for some hotels is a 50-100 percent cancellation fee for the meeting rooms, sleeping rooms and food, depending on how much notice is given. The rules may be loosened for some customers, depending on the cancellation reason and relationship with the customer.