

## **Billing Customers: Getting It Right the First Time**

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*Fourth and final article in a series about the role of the conference planner in meeting-intensive business environments.*

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**E**very organization that offers event support such as catering, room set up and audio-visual systems, is likely to encounter situations where internal and outside customers have to pay for these services. The days of “free” goods and services are behind us, so the pressure is on to recover costs through internal transfers of budgeted funds, or bill outside users.

*What does it take to set up a streamlined system that accepts a variety of payment types, and to train the conference planners so that billings will successfully navigate to the appropriate destination?*

This area of event support is as important as the event itself. Why follow-up an excellent performance with mishandled billing statements?

Event charges typically are handled two ways: through the internal charges for “official” events, or through credit cards and personal checks when outside groups use space and resources. “Official” refers to events that meet the organization’s business requirements. Let’s look at how to approach each case.

### **Internal Charges**

There are no standard, templated solutions, but there are several considerations to include in the overall approach:

- Create a project team that, at a minimum, includes the senior conference planner, a senior IT person who works with financial and accounting systems, and a budget official with knowledge of accounts that are likely to be debited. There may be more interested parties, but the core group should be able to address procedural and technical hurdles.
- A legal review may be necessary to ensure that such issues as tax-exemptions and the definition of business-only fund usage are handled appropriately.
- Form a user group of those who review billing statements and approve payment.
- Run numerous trial transactions – request, review, approval and payment – before the final roll-out.
- Develop and publish procedures once a defined process is agreed upon.

These considerations assume that internal billing methods will be integral to the “start-up” process. There will be more areas of analysis, but careful research of budget control procedures at the outset will create the foundation for viable solutions.

### **Outside Charges**

Requests for services from outside groups can be handled by requesting a credit card as security for payment. When the event is over, the customer can pay with the credit card on file, or some other acceptable form of payment. (Of course, the conference planner must verify that the card is valid.)

### **Recap**

This article series covered a wide spectrum of event management solutions made

available through the employment of professional conference planners. The advantages are clear as long as you observe the following key points:

- Clearly define the need – do you have sufficient scheduling demand to rationalize the staffing costs?
- Choose a conference planner employment model that fits your budget.
- Commit time and effort to creating policies and procedures. Maintaining consistent customer expectations as well as conference planner training is important.
- Look for streamlining opportunities – can the billing process be enhanced? Is there new software that integrates the request/reservation process and billing?
- Be sure to include your customers in your solutions.

Say good bye to the PC workstation covered in yellow peel-and-stick notes – your customers deserve better. Besides, it doesn't hurt to increase sales and recover event costs.

See all articles in this series at our web- site, [clariongp.com](http://clariongp.com), at the newsletter tab.

*Clarion can help you plan, inaugurate and implement your conference planning program and improve all other aspects of your facilities services . Contact Ernie Wilder, 904/940-1208 or Tom Mac Dermott, 603/642-8011 or e-mail us at [info@clariongp.com](mailto:info@clariongp.com)*