

Organizing the Conference Planner Program

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Second in a series about the role of the conference planner in meeting-intensive business environments.

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If you've decided to proceed with the conference planner concept, you'll need to spend some time on policies and procedures before the planner begins working. Managing customer expectations begins with concise and understandable rules that describe how a task is undertaken and delivered.

Establish Policies

Your new conference planner will need a clear "road map" as a guide through scheduling and delivery of products and services at reasonable times while creating a friendly and helpful service environment that enhances sales. Without established policies and procedures, service delivery promises will be inconsistent, resulting in confusion and disappointment at all levels.

Policy and procedure documentation is the responsibility of the client/owner, not the vendor company that employs the conference planner. Issues connected with service – timeliness of delivery, food quality, billing errors – become your responsibility, especially when financial remediation is involved. Besides, you should always be able to amend and interpret policies without external reviews and approvals.

The Policy and Procedure Team

Development of policy and procedure documentation is a collaborative effort that should include, at a minimum, representatives from the following areas:

- Your manager of vendor contracts.
- The service vendors – food service, furniture moving, cleaning, audio/visual.
- Customer user group, for the most valuable resource, customer buy-in.
- Legal experts, to maintain clear lines of authority and responsibility between the vendors and the company.
- IT, for incorporation of policies and procedures into the company network.
- Financial, for billing and services.
- Training – Your training department will need to create and implement programs for certain groups, including end-users, and for communicating the new policies and procedures.

The Startup

The big day has finally come. You've created your policies and procedures, end-users and conference planning staff have been trained, and institution-wide email announcements have been circulated.

The first order of the day is a coffee service for 30, to be delivered and set up within the next 45 minutes. Your conference planner knows that policies require a minimum 24 hour advance notice and any shorter notice means a "best effort" delivery. This customer is very challenging and any

shortcomings will likely be blamed on the food service vendor.

The catering manager calls to say the coffee service was 30 minutes late and the meeting principals are angry.

Apologize and Follow Up

As contract manager, your job is to apologize for the “gaff”, but you need to ensure that anyone who places a catering order understands the policies and the limitations of the vendor’s capabilities.

You meet with the conference planner and catering manager, review the situation and compliment them for their performance under difficult circumstances.

The policies and procedures defend the actions of your vendors, and hopefully, these episodes will decline as end-users abide by the policies.

The third and final article in this series will discuss the synergies afforded by coordinating the conference planner’s role with other on-site service providers.

Clarion can help you plan, inaugurate and implement your conference planning program, including policy and procedure preparation, review of on-site resources, selection and coordination of vendors and training. Contact Ernie Wilder, vice president, 904/940-1208 or Tom Mac Dermott, president, 603/642-8011 or e-mail us at info@clariongp.com.