

# executiveevents

EXCEEDING EXPECTATIONS

**executiveevents**  
MENU OF SERVICES

- 1** REGISTRATION SERVICES
- 2** LEAD RETRIEVAL SERVICES
- 3** SESSION TRACKING/CONTINUING EDUCATION SERVICES
- 4** LODGING MANAGEMENT
- 5** EVENT PLANNING
- 6** EVENT PLANNING - Additional Services
- 7** TRADE SHOW MANAGEMENT

## Advance Registration Services

### REGISTRATION SETUP & TRAINING

- Outline roles and expectations with client
- Obtain all necessary information from client (logo, design preferences, merchant account details, etc.) in order to handle design and creation of online registration form
- Discuss registration form needs/objectives with client and analyze best way to structure form
- Build online registration form, custom emails and standard reports
- Test online form internally, then have client review registration form
- Send registration form URL to client to link to their event website
- Create paper registration forms, if requested
- Provide toll-free number for call-center support
- Set up custom event email for online inquiries
- Obtain event information to familiarize ourselves with the event
- Create Frequently Asked Questions document to ensure we have all details, and can respond knowledgeably to inquiries
- Train in-house customer service representatives on all aspects of the event

### EVENT MICRO SITE BUILD

- Select template for Event Website
- Handle project management between client and web designer
- Collect all critical assets for site build
- Create content for site build

- Purchase photos, artwork if required
- Set up masked domain
- Build site
- Request client feedback
- Oversee final changes
- Update/Maintain Website as changes occur to content

### ADVANCE MANAGEMENT: PROCESSING & REPORTING

- Serve as event information center for registration questions
- Handle data entry of all phone, fax and mail registrations
- Send registration confirmations via email
- Send reminder and announcement emails
- Act as liaison with software vendor in terms of functionality and system challenges
- Create custom reports
- Setup comp and discount codes in system and provide reporting
- Handle Visa Invitation letters for international attendees
- Outline payment procedures for handling check payments, wires and manual credit card adjustments
- Apply check and wire payments as received
- Handle proper documentation of cancellations, including credit card refunds and request for check refunds
- Track balance dues and help to collect outstanding fees
- Work with the client to ensure deadlines are extended or promotions implemented appropriately
- Assist with the announcement of added sessions or registration options

- Update registration information as changes occur
- Handle wait-listing for sold out sessions or items

#### **EXHIBITOR REGISTRATION: PROCESSING & REPORTING**

- Create exhibitor complimentary codes and enter into registration site
- Send email with complimentary codes (or links) to exhibitors
- Follow-up with exhibitors who have not registered staff to ensure registrations are completed prior to coming onsite

## Badge Production

(Print-On-Demand & Pre-Printed)

#### **PRINT-ON-DEMAND BADGE SETUP**

- Obtain badging (and/or ticketing) design specifications and needs from client
- Create badge mock-up & send to client for approval
- Have client sign off on badge mock-up and final quantities to order
- Pre-order badge stock with client logo (and any items that are static or need to be printed in color)
- Order badge holders, lanyards, ribbons, and any other badge supplies
- Test badges
- Send client printed badge sample(s) for final onsite printing approval

#### **PRINT-ON-DEMAND BADGE PREPARATIONS**

- Discuss necessary logic for programming
- Create API connection between online and onsite system
- Build the onsite registration database
- Brand onsite system with event logo
- Test upload (or API) from registration system(s) to print on demand software
- Ensure all programmed logic is tested and accurately pulling through information for onsite printing
- Create FastTrack email with QR code for onsite check-in and send to client for approval
- Send FastTrack email to confirmed attendees prior to arriving onsite

#### **BADGE VERIFICATION (PRINT-ON-DEMAND & PRE-PRINTED BADGES)**

- Create and test badge verification email
- Send to client for approval
- Discuss timeline for sending email and receiving changes
- Send badge verification email
- Receive changes and make corrections in registration system

#### **PRE-PRINTED BADGE SETUP**

- Obtain badging (and/or ticketing) design specifications and needs from client
- Setup badge in registration system and/or in Microsoft Word mail merge
- Send to client for approval

- Order badge stock, badge holders, lanyards, ribbons, and any other badge supplies
- Test badge barcodes, if offering Lead Retrieval

#### **PRE-PRINTED BADGE PROCESSING**

- Print badges
- Stuff badges into holders
  - Stuff any additional items, such as ribbons, tickets, etc.
- Ship badges to event
- Track any updates, changes, cancellations to be reprinted/pulled onsite

## Planning for Onsite Registration

#### **REGISTRATION PLANNING & TRACKING**

- Create Registration Production Schedule & Plan outlining:
  - Budget
  - Production Schedule & Timeline
  - Badging Plan
  - Staffing Matrix
  - Onsite Registration Plan
  - Session Scanning Plan
  - Critical Contacts List
  - Debrief

- Set up planning meetings with client to review progress and next steps
- Debrief following each event, providing outline of suggested improvements

#### **ONSITE PREPARATIONS**

- Diagram onsite registration area including needed counters and equipment
- Identify registration signage needs and provide to the client
- Handle pre-event arrangements for accepting payments onsite
- Create onsite registration budget so client can approve anticipated costs

#### **ONSITE EQUIPMENT ARRANGEMENTS**

- Work with meeting planner and/or venue contact on equipment setup needs, including networking, internet, power/electrical
- Confirm needed number of laptops/tablets, printers, and scanners
- Determine setup and breakdown times
- Verify numbers one week prior and make changes as needed

#### **ONSITE STAFFING ARRANGEMENTS**

- Outline staffing needs
- Create staffing matrix and estimated costs for budget
- Determine whether local temps, client staff or volunteers will be used
- Request bids from local temp agencies for client review
- Hire necessary staff

- Request event program from the client with event specific information
- Create Staff Training Manual
- Verify staff 48-hours prior to event
- Manage temp staff schedule and adjust as needed

- Process onsite registrations and apply payments
- Make changes per attendee requests
- Reprint badges
- Run reports and registration counts
- Ensure all attendees are checked-in (Either automatically through POD, or manually for pre-printed)

## Onsite Registration Management

### ONSITE SETUP

- Ensure counters are set up and signage is accurate
- Set up registration computers, printers and scanners
- Test equipment
- If printing onsite, run data integrity test to ensure API is functioning appropriately and badges printed with correct logic
- Train registration team on registration procedures including check-in of pre-registered attendees, staff & speaker check-in, exhibitor & sponsor check-in, onsite registrations, substitutions & badge corrections, payment application, and any other necessary information to be communicated to attendees
- Stock each station with event materials and supplies
- Setup back-up procedures, in case the internet fails, and ensure back-up printing capabilities working at all stations

### ONSITE REGISTRATION MANAGEMENT

- Manage registration throughout the length of the event
- Distribute name badges and event materials to attendees

### ONSITE REGISTRATION BREAKDOWN

- Handle breakdown of registration area
- Manage breakdown of registration equipment and return shipments
- Return all unused materials
- Send client final event reports

### EVENT FOLLOW-UP

- Ensure all payments are applied correctly and reconcile all onsite transactions
- Change statuses in registration system so attendees accurately reflect “Attended” or “No-Show”
- Pay temp staff on behalf of the client
- Debrief with client
- Submit final bill to client

**LEAD RETRIEVAL DEVICE RENTALS**

- Provide client with Lead Retrieval Order Form for Exhibitor Kit
- Obtain list of exhibitors
- Contact exhibitors to offer Lead Retrieval service
- Test bar/QR code on badge to ensure clean scan
- Make hotel and/or travel arrangements for scanning tech

**ONSITE LEAD RETRIEVAL MANAGEMENT**

- Determine location of Lead Retrieval help desk
- Set up help desk
- Hand out scanners to exhibitors
- Train exhibitors on scanner usage and reporting
- Download information from scanners
- Provide exhibitors with detailed reporting & access to web-based data

**FOLLOWING EVENT**

- Provide client with details on Lead Retrieval usage
- Send attendees an email listing the exhibitors they visited with contact details

**SESSION SCANNER DEVICE RENTALS**

- Outline needs with client
- Develop parameters for Session Tracking
- Create grid of sessions
- Build onsite program
- Produce barcodes for room scanning
- Program and ship equipment onsite

**ONSITE SESSION SCANNING MANAGEMENT**

- Manage session scanning
- Ensure scanners are setup for the appropriate session(s)
- Train staff on use of scanners
- Download information from scanners
- Provide client with detailed reporting

**CONTINUING EDUCATION MANAGEMENT**

- Outline needs with client
- Determine parameters for continuing education units
- Decide whether CE processing will be handled onsite or following the event
- Build CE Software to meet client needs and regulations
- Create CE certificates
- Test software & have client approve software and certificates
- Set up reporting
- Provide onsite support



**LODGING MANAGEMENT**

- Handle research, negotiations and contracting of room block(s)
- Set up room blocks and rates per hotel contract(s) lodging software
- Assist attendees with lodging reservations, questions, changes and special requests
- Leading up to the event, send reminder emails periodically to attendees who do not make their reservation with the event hotel
- Manage master room list (Staff, Board Members, Keynote Speakers, VIPs, etc.) including assignment of discounted staff rooms, amenities, upgrades, special requests, ground transportation, etc. as per hotel contracts
- Monitor hotel cut-off dates to ensure rooms are released, or block increased as required
- Monitor room block and ensure rooms are added on pre/post nights
- Manage earned comp nights and any special rate rooms and ensure they are applied to reservations within the block
- Generate initial hotel rooming list and submit to hotel
- Receive lodging confirmations from hotel and send email confirmation to attendees
- Proof arrival and departure dates to ensure no errors were made. If errors are found, contact hotel with corrections
- Track all attendee reservation changes/updates and send to hotel on a daily basis, after initial rooming list is submitted
- Request final rooming list from hotel and review to ensure all reservations are accurate
- Provide hotels with contact information for onsite management of arrival reports, no-show reports, cancellations, etc.
- Arrange pre-event meeting with hotel contacts and review procedures and expectations
- Reconcile final pick-up at hotel and final hotel billing
- Send attendee list to hotels for audit purposes; determine the number of attendees that made reservations at the hotel outside of the room blocks
- Ensure commissions are sent in a timely manner

## Venue Selection

(Site Research, Negotiations, Contracting)

### **SITE RESEARCH**

- Receive top 3 cities and date information from client
- Create Request for Proposal with client's direction
- Ensure RFP meets clients' needs/approval
- Research likely venues based on budget, desired location and dates
- Send RFP to those identified as best fitting client needs
- Handle queries from venues regarding RFP
- Receive proposals
- Review proposals and follow up with venues with questions/clarifications as needed
- Create comparison document outlining venue options and recommendations
- Present options to client

### **SITE VISIT FOR VENUE SELECTION**

- Once client has identified the top 2 or 3 venues that most interest them, set up site visits
- Obtain best schedule from client for site visit
- Set up complimentary lodging with hotel
- Make arrangements with venue reps for site visit/tours
- Handle complimentary ground transportation arrangements
- Conduct site visit along with client
- Complete site visit evaluation on each property

- Meet with client to identify their preferred option
- Invite local CVB to join site visit

### **SITE NEGOTIATIONS & CONTRACTING**

- Request contract
- Compare contract to proposal to ensure offer accuracy
- Identify areas of concern – price, concessions, space
- List additional needs and/or changes, provide to venue
- Negotiate final pricing, dates, space, concessions and contract stipulations with venue
- Review changes and provide final contract to client for review
- Handle any additional negotiations
- Obtain signature from client representative
- Send agreement to venue for countersignature

## Event Management Services

### **SETUP & REVIEW OF EXPECTATIONS**

- Develop goals and clarify roles
- Identify reporting needs
- Receive and review event agenda (with client) and offer suggestions
- Develop conference call schedule with key client staff
- Provide agendas and post-call summaries

**MASTER SCHEDULING AND MATRIX**

- Create master production schedule with deadlines
- Review production schedule with client
- Update schedule and communicate regularly with client
- Ensure deadlines are met by all Executiveevents champions
- Create event matrix outlining room assignments, room set-ups and audiovisual needs based on client agenda
- Communicate updates, changes and challenges with primary client contact

**COMMUNICATIONS WITH VENUE CONTACT**

- Review expectations and timelines
- Forward Client agenda/final program to venue
- Review current venue contracts and offer feedback
- Obtain off-site vendor recommendations and references
- Work with venue on close coordination of Executiveevents logistics outlined in contract
- Create event specifications for venue
- Meal coordination and menu negotiations
- Final Pre-event meeting
- Problem solve with hotel as issues arise

**BUDGETING & ANALYSIS**

- Closely review budget, provided by client
- Assist client with estimated budget figures, as needed
- Track and report on all expenses
- Provide data to assist with final budget to actual analysis

**SITE INSPECTION**

- Once venue is contracted, conduct physical site inspection of venue
- Meet with hotel contact to walk site and discuss
- Visit to local vendors if hired to manage off site planning
- Invite local Convention and Visitors Bureau to attend site visit and offer input
- Take site visit notes, create list of requirements/challenges and provide list of next steps and priority items

**LODGING**

- Provide rooming list and pick-up as requested
- Handle staff/faculty/speaker rooming arrangements for those whose lodging will be paid by master account
- Send lodging confirmations
- Provide list of registered attendees to venue for name audit/include those outside the block for final counts
- Receive, reconcile lodging reservations on the master account and submit bill to client for payment

**AMENITIES**

- Identify amenity needs for VIPs and speakers and submit to hotel
- Present recommendations and pricing to client for selection
- Instruct hotel to ensure timely placement of amenities
- Confirm delivery of amenities onsite with hotel

**FOOD AND BEVERAGE (Onsite - breakfasts, lunches, morning/afternoon breaks, dinner receptions)**

- Review needs and budget with client
- Work with caterer/banquets to provide an initial menu plan for the event
- Create food and beverage cost estimate based on selections
- Work with the client to adjust menu/amounts, as needed prior to event
- Handle final food and beverage selection, negotiations, and ordering
- Identify location for catering meal function
- Provide final guarantees to hotel 72 hours prior to event
- Provide list of special dietary requests to hotel
- Review and approval of BEO for each onsite function
- Verify meal set-ups and presentation onsite
- Make changes to numbers as needed
- Coordinate water service in all session rooms, exhibit hall and additional rooms
- Manage logistics for onsite reception
- Receive, reconcile and submit bill to client for payment

**MEETING SPACE MANAGEMENT**

- Assess all meeting space needs with client to include:
  - General session
  - Concurrent/breakout session rooms
  - Tutorials and/or Workshops
  - Staff office

- Green room or sponsor networking areas
- Reception
- Meal rooms
- Break areas
- Registration

- Work with hotel to create room diagrams
- Provide room details, dimensions, availability to client to assign their sessions according to popularity of content
- Work with those in charge of program to ensure optimal flow of sessions
- Create specs document for venue outlining set-up, furnishings and
- AV needs
- Arrange for room turns
- Plan for registration area set-up
- Verify catering areas set-up
- Provide final list of room assignments to client for meeting materials

**AUDIO/VISUAL**

- Obtain Audio Visual budget from Client; suggest necessary changes based on program
- Create list of potential suppliers
- Craft and send request for proposal
- Review bids
- Make recommendations of best A/V supplier to client based on their budget and vendor qualifications

- Handle negotiations and contracting with selected vendor
- Obtain AV needs for all general and concurrent sessions from primary client contact
- Review AV order and send to client for approval
- Make changes to AV order as necessary
- Pre-event meeting with AV vendor onsite
- Onsite management of all AV needs
- Recommend appropriate staffing needed to ensure smooth event
- Receive, reconcile and submit bill to client for payment

#### **SIGNAGE**

- Obtain signage budget from client
- Obtain needs from client (signage, entrance units and banners)
- Obtain bids from signage vendors
- Make recommendations to client
- Order signage
- Forward proofs to client for approval
- Direct vendor onsite for signage placement and teardown/move out
- Receive, reconcile and submit bill to client for payment

#### **SPEAKER LOGISTICS**

- Create speaker needs form for room set and audiovisual
- Determine location of each presentation
- Send needs forms to client for distribution to speakers
- Make appropriate arrangements based on client approved and compiled items

#### **ONSITE EVENT MANAGEMENT**

- Pre-event meeting with venue and primary contact
- Change daily signage
- Pre-event meeting room and AV checks
- Onsite review of lodging no shows/reinstatement of sleeping rooms
- Onsite logistical coordination of AV vendor
- Confirm and oversee onstage rehearsals
- Set up and oversee VIP meet and greets
- Verify timely arrival of meals
- Review and sign-off on catering and electrical bills
- Manage outside vendor performance (furniture, signage, floral, photographer, security, transportation, etc.)
- Act as onsite contact for committee leads and/or primary client contact
- Act as onsite contact for all speakers
- Ensure registration is set up in timely manner
- Offer recommendations to ensure timely and effective flow of sessions
- Problem solve as needed

#### **POST MEETING SUMMARY**

- Conduct debrief meeting and/or provide feedback for improvement
- Hotel summary of all reservations, attendee occupancy and no shows (master account)
- Provide final Banquet Event Orders (BEOs) and Banquet Checks
- Final vendor billing

#### **POST MEETING BILLING**

- Final bill reconciliation of all vendor invoices to client within 30 days of event

## Call For Papers/Abstract Management

- Outline roles and expectations with client
- Obtain details necessary for Call for Papers software build including tracks, deadlines, email content, etc.
- Create Call for Papers
- Have client test
- Make Call for Papers live
- Set up reporting
- Train client on usage

## Event Program Support

### **EVENT PROGRAM**

- Work with committee on what should be included in the event program
- Assist with hiring graphic artist to lay out the program
- Remind committee about content deadlines
- Participate in proofing/editing of program before print
- Coordinate delivery of content to printers
- Ensure programs are delivered on time to venue

## Exhibitor & Sponsorship Sales

### PROSPECTUS SUPPORT & DESIGN MANAGEMENT

- Work with client to set up sponsor opportunities/levels
- Once designed, review exhibitor/sponsor prospectus and provide feedback
- Solicit bids from graphic designers or work with in-house designer on prospectus creation/update
- Collect prospectus content from client and share with designer
- Send prospectus to client and collect gather any changes
- Communicate changes to designer or in-house designer
- Order final copies of approved prospectus

### EXHIBIT & SPONSORSHIP SALES

- Work with client to identify potential exhibitors and sponsors
- Distribute prospectus to potential exhibitors/sponsors
- Obtain materials to support sales efforts (brochures, sponsorship deck, organization information, event materials, thank you notes, etc.)
- Set up calls/meetings with potential exhibitors and sponsors
- Follow-up on leads obtained from client
- Handle queries regarding exhibits and sponsors
- Sell booths/sponsorships and communicate exhibitor registration process to expo staff
- Provide exhibitor space assignments
- Report progress to client
- Participate in planning meetings, provide updates
- Produce sales and financial reports pertaining to booth/sponsor sales

### EXHIBITOR & SPONSOR FOLLOW-UP & SUPPORT

- Once “sold,” ensure monies received
- Follow up to ensure deliverables are met
- Create system to support comps and discounts (as well as limits)
- Send registration procedures/codes to exhibitors to register their booth staff
- Work with registration team to ensure exhibitors register their team in advance
- Communicate needs to registration team so they can produce badges, tickets, ribbons, etc.
- Obtain logo, bios’, other info for advertising
- Meet onsite – assist as needed
- Handle resign for future year event
- Follow up after the event

## Exhibitor/Sponsor Logistics

### DECORATOR/FLOOR PLANS

- Hire exhibit hall decorator
  - Research decorator options
  - Create and send RFP
  - Receive bids and compare options
  - Make recommendations to client
  - Contract with vendor choice
- Work with decorator to design and create floor plan

- Determine exhibit hall hours for attendees and load-in/load-out for decorator
- Work with decorator on exhibit arrangements:
  - Drayage
  - Shipping
  - Electrical
  - Furniture
  - Carpet
  - Labor
- Ensure decorator distributes exhibitor service kits/confirmations  
Assign booth spaces

**ONSITE EXHIBITOR/SPONSOR MANAGEMENT**

- Ensure decorator is set up in timely manner
- Work with decorator onsite to ensure layout of exhibit hall is as approved by client
- Monitor exhibitor move-in, set-up and move-out
- Act as onsite contact for exhibitors/sponsors
- Problem solve exhibit/exhibitor/sponsor issues onsite