

THE MEETING PROFESSIONALS HANDBOOK

100 Questions to Ask

When Planning Your Next Meeting or Event

By Doug Baarman

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INTRODUCTION

Dear Fellow Meeting Planner,

It is not easy being a meeting planner. After spending 18 years of my hospitality career on the hotel side, I have enjoyed the 7+ on the meeting planning side. As a planner, you are challenged with balancing many priorities at once, staying calm during stressful situations and helping the organization achieve the desired goal for the meeting. I must admit, it is truly one of the most challenging...and exciting opportunities I have experienced within my hospitality industry career.

In this Handbook, I want to share a series of '10 Questions to Ask Before...'

- Planning a Meeting and Event
- Hiring a Meeting and Event Planning Company
- Hiring a Company to Handle Your Incentive Trip
- Selecting a Destination / Facility
- Using a Convention and Visitors Bureau (CVB)
- Selecting a Destination Management Company (DMC)
- Going Green
- Hiring a Key Note Speaker
- Selecting a Registration and Housing Service
- Hiring a Security Company

In future Handbooks, I will share the following tips:

- Volume Two: RFP's/Site Inspections
- Volume Three: Contracting
- Volume Four: Pre-Event/Onsite/Post-Events

We all want to be the best meeting planner that we can be. I hope this Resource Guide and the information that we share in our Meeting Planner Playbook blog will help you in your career.

In addition, I want to share information on what we have all known intuitively since we entered this industry, the importance of meetings to our economy, which has now been proven by the Convention Industry Council. The Economic Significance Study demonstrates that meetings matter to our local, national and in fact the global economy. The research quantifies the economic

contributions made by the 1.8 million meetings, trade shows, conventions, congresses, incentive events and other meetings that take place across the country. The key findings of the study are:

- 1.8 million meetings
- 205 million participants
- \$263 billion in direct spending
- \$106 billion contribution to the GDP
- 1.7 million jobs

Historically, our industry has been overlooked as a vital industry. According to Roger Dow, President and CEO of U.S. Travel, much of the industry's woes come from perception at home and abroad. Domestically, travel has taken a back seat to other industries, such as manufacturing or automobiles. "One in nine Americans has a job in the travel industry," says Dow, it's two and a half times bigger than the auto industry, but have you ever heard one person say, 'Gee, I wonder how the travel industry is doing?'" But with the recent study we now have significant numbers that places our industry above many industries including the often discussed auto industry.

Face-to-Face meetings will continue to be an important way to meet potential customers, business partners, build relationships and share valuable information. These face-to-face meetings were described in Association Meetings Magazine with the following bullet points:

- Historically, the term 'meeting' has been broad-based and often used to refer to a wide range of events of varying sizes and types, during which a number of people came together in one place to confer or carry out a particular activity.
- The key purposes of meetings are to motivate participants, conduct business, share ideas, and learn. Frequency can be on an ad hoc basis or according to a set pattern (e.g. annual general meetings, committee meetings, etc.).
- Based on further refinement by the UN World Tourism Organization, the term 'meeting' refers to a gathering of 10 or more participants for a minimum of four hours in the contracted venue. Meeting types include conventions, conferences, congresses, trade shows and exhibitions, incentive events, corporate/business meetings and other meetings that meet the aforementioned criteria.

According to the Cornell Hospitality Report, the face-to-face meeting is most likely the best approach in the following business situations:

- To captivate attention, particularly when you want to initiate something new or different;
- To inspire a positive emotional climate, as a way to catalyze collaboration, innovation and performance; and

- To build human networks and relationships, realizing that information can increasingly be shared virtually whereas the greater value is in people networks and relationships.

As key contributors within our industry, we can stand proud knowing that our industry plays a key role in our country's economic well being. Stephen Perry, New Orleans CVB, commented in a article recently which best describes how all of us feel and I am sharing his final thought- 'What we do and the visitors that we bring in create the markets that allow city after city to have performing arts theaters, venues, museums and attractions that can improve these communities. You are changing the world every time you advance travel and the mixing of different cultures. That makes me wake up every morning'.

So what does all of this mean for YOU? It means that meetings matter to our economy. It means that your role matters within the industry. It means you chose a career in an industry that is not only exciting, but serves a great purpose. Yes, face-to-face meetings matter...and so do YOU!

I wish you continued success in this amazing industry.

Doug Baarnan

10 QUESTIONS TO ASK BEFORE...

Planning a Meeting and Event

1. What are the expectations for the meeting or event (need to discuss internally)?

You need to have a clear expectation for the meeting. Are you getting people together for training, brainstorming, strengthen relationships, etc. A clear expectation will ensure a positive result.

2. Do you have event history/meeting requirements from previous events?

Accurate records about past meetings are very helpful when selecting sites. With good data about past experience, you can anticipate current needs more accurately.

3. What is your budget?

You need to develop a realistic budget for the event. The budget will help guide you on where you go, how long the event will be and who will be invited. It will guide many of the decisions you make throughout the planning process.

4. What are your preferred destinations/locations/venues?

The goal is to minimize distractions and maximize group participation.

5. Who do you want to attend?

You should decide the scale of who can attend based on your objective. The number of attendees can be larger for one way communications, but should be smaller for sessions intended to be interactive.

6. What is the agenda?

Do not pack the schedule. You want to leave time for networking, activities and down time for the attendees.

7. Does your current staff have the time to plan the meeting?

Assigning additional tasks may overload your current team and jeopardize the quality of work they are able to provide. If not, you may want to consider bringing in some outside experts to assist you.

8. Could the talents of your staff be better utilized by outsourcing some tasks?

Allowing your staff to concentrate on what they do best and outsourcing some of the legwork could provide more efficiency and better results.

9. Do you know the venue?

Make sure you are completely familiar with the destination and all of the venues that you will be utilizing so you can maximize the experience.

10. How are you going to market the event?

Even if it is an internal or mandatory meeting, you want to 'sell' why you should attend and the expected outcomes.

10 QUESTIONS TO ASK BEFORE...

Hiring a Meeting and Event Planning Company

1. Do you have the expertise on your staff to handle your current meeting and event needs?
If not, you may want to consider outsourcing site selection and contract negotiation to meeting experts that book thousands of events worldwide each year and have solid industry relationships that you can use to your benefit.
2. Is the meeting management company “full service”?
What is the full scope of services they offer? Be sure they offer all of the services you will need at the costs that are within your budget.
3. What technology is used to source hotels? How do they provide a comprehensive analysis of what is available in the market?
Be sure they are using a proprietary database with pricing intelligence and that a broad range of hotel brands are being sourced. Ask for work examples you can review.
4. Does having more buying power help you with rates, attrition, cancellation, etc.?
The volume buying power of successful meeting management companies allows them to purchase from suppliers at discounted prices. They are able to separate out ideas that will work from those that have low impact value. Some even have pre-negotiated standardized contracts that offer the most favorable terms in the industry.
5. Will this save my organization money?
It is possible as they can tap into resources that will improve your event for less money than you expect as well as provide audit services post event to be sure all invoices are 100% correct.
6. Will they represent our organization with integrity?
Always request references both on the supplier side and the customer side to make certain that you partner with the right organization.
7. Who would be assigned to work with us?
Identify if you will have a single point of contact or if there will be a team of folks and ask for their qualifications.

8. Have you worked with similar organizations?

Ask for a description of three events they have produced in the past two years that are relevant to your organization stating the goals and a brief description of each event.

9. Do you have references that we could speak with?

This is a must!

10. How are they compensated?

Is it a percentage of expenses, a management fee based on an hourly or daily rate, a cost per person based on established criteria or do they earn a commission from the supplier.

10 QUESTIONS TO ASK BEFORE...

Hiring a Company to Handle Your Incentive Trip

1. How many years of experience do they have in the incentive travel market?

When you hire incentive travel companies, you're deeply invested in making sure your travelers have a mountain top experience—something truly delightful and outside of their normal travel experience. Any snags in the travel experience mitigate the goal of your incentive travel program and undermine your investment.

2. Have you done your homework on the company you plan to hire? Did you ask for specific references and client testimonials?

Be sure name and contact information is provided. The single most important tool in the incentive planner's arsenal is the testimony of peers.

3. What organizations are the company affiliated with (i.e. SITE – Society for Incentive & Travel Executives)?

Many belong to at least one industry association. SITE's website includes a search engine that lets planners search for outsourcing partners by type and location.

4. What technology or software is used to track airfare, group air reservations and online hotel registration?

Technology, now more than ever, is crucial to obtaining the best performance. Ask for copies of reports generated by incentive performance tracking systems. Ask for a demo website address so that you can verify Internet technology claims.

5. Ask about hours of operation, after hours availability and emergency availability

You want to be sure you are always able to be in contact when necessary.

6. Have they taken the time to ask about your corporate culture, company values & specific goals for this event?

What are you hoping to achieve? Generate sales, boost morale, improve customer service, or hit a given revenue mark? It is important to decide what you want to accomplish as well as have a good understanding of your business and its inherent corporate culture.

7. Will you have a single point of contact from day one? Will this same person be onsite for your event?

You need to meet the key people from the companies you're considering. Invite them to your office to discuss your situation. The interpersonal chemistry, cultural compatibility, and trust that are critical to a long-term partnership can be determined only through face-to-face contact.

8. Ask about the size of their company. Bigger is not always better. If you are a small to mid market client, then similarity in size might make for a more comfortable match.

When you're shopping for the right incentive travel partner, start by realizing all incentive travel companies aren't created equal. Just like the rest of the travel industry, you have your discount incentive travel companies, your luxury incentive travel companies, boutique incentive travel companies, and your "big box" incentive travel companies—the kind that offer a generic but generally good experience to huge numbers of clients.

9. What do they do to help promote and create enthusiasm for the event? Do they offer printed collateral, online promotions, themed marketing and mid contest teasers?

You need to communicate throughout the life of the program to keep the program in the forefront of the participant's minds. In a non-cash program you can highlight different awards each time you communicate to the participants keeping them interested in meeting your goals and earning in the program.

10. How will they help you measure your ROI? Will they conduct employee surveys? Will they provide a cost/benefit analysis?

Once your goal is complete, candidly assess its effectiveness - what worked and what didn't? This type of evaluation will be useful when it comes to creating other company incentive programs as well as considering alternatives to improve an existing program. What did they think of the goals? The awards? The timeframe to earn?

10 QUESTIONS TO ASK BEFORE...

Selecting a Destination/Facility

1. Does the destination/facility meet the geographic location needed?

You want to choose a location that is convenient for a large number of your potential attendees. In addition, it needs to meet your preference for moving it around- east, central, west.

2. Does the destination/facility offer the right products and services to meet the needs of this event?

Hotel rooms, meeting space, activities in the area, golf, beach, gambling, shows and dining. These are the features and services needed to meet the objectives you established for the event.

3. Does the destination offer a variety of transportation options for your potential attendees?

Car, train, air, subway, taxi, etc. The more that is available, the easier it will be to attract potential attendees.

4. What does the final package price or individual pricing include?

You need to be able to evaluate the overall pricing package to ensure it is within your budget.

5. Time of year/Seasonality

If you can be flexible with dates, find out what that will mean to the city/facility. Ask about the peaks and valleys of their business cycle so you have a broader, comprehensive overview of their busiest and slowest times. Keep in mind that if you're able to book dates in a period or weekday pattern that helps the city/facility, you'll most likely leverage a much better deal.

6. Can you provide staff to work the event?

The staff includes servers, licensed bartenders, convention service, valet and a dedicated event planner. Make sure to find out what staff and how many will be assigned to your meeting or event.

7. Have you hosted other groups like ours before?

Be sure to request references of other groups, similar to yours that they have handled. Make sure the name and contact information is provided.

8. Can I bring in my own vendors (AV, Caterer)?

This is an important topic to discuss if you plan to bring in your own preferred vendors. There may be restrictions and you will want to know about these in advance.

9. If your program grows, will the destination/facility be able to accommodate?

Make sure the destination and/or facility enable you to grow if needed. You want to know who will be able to assist you with this request.

10. What is the contracting process?

The most effective method to add more value to your meeting and bottom line is to design and utilize a custom hotel contract (not addendum) that is ready for hotel signature. Your custom contract should address all contract components, value added concessions, hotel fees and surcharges (eliminate or reduce), performance clauses and legal department liability language.

10 QUESTIONS TO ASK BEFORE...

Using a Convention and Visitors Bureau (CVB)

1. What services do you provide?

Make sure you ask the CVB about the menu of services available to you, your attendees and your exhibitors, as most of them are probably complimentary or extremely low cost. Keep in mind that every CVB will vary in its offerings, as well as whether or not they can offer their services to you if you didn't use them to generate your lead.

2. What is new in town?

A lot of second and third-tier cities have been adding their fair share of new, quality amenities to better compete with first-tier destinations, so if you've never experienced the destination or haven't visited in a while, ask what the city has done to improve its offerings.

3. Will a CVB be helpful after hotel agreement has been finalized?

They provide an insight into their city – including services other than the hotel i.e. transportation, restaurants, off site venues, calendar of events, directions, airports, etc.

4. Do they base the amount of collateral they can give a group on the amount of room nights?

Many services provided by CVB's that require a fee are based on room nights booked. Some are flat rates while others are sliding scales.

5. Can the CVB offer discount or free tickets to shows, entertainment or other services?

It is good to know what other services the CVB can assist you with.

6. Will the CVB help you schedule site inspections at the properties you want to see?

Ask about CVB-sponsored trips that allow you to experience a destination and customized site visits that offer a more in-depth look at the hotels and amenities you're most interested in.

7. What are the peak and off peak times in your city?

If you are flexible, you should be able to find a time that will offer the best value and remain within your budget.

8. What will be happening/what other events are in your destination during my event?

Ask about any large events and development projects that could potentially impact your event as well as your attendees' ability to get in, around and out of the city while you're there.

9. What is your relationship with the convention center?

Does the CVB represent the facility, how is it managed and is it tax based or publicly owned?

10. Can you offer creative options and ideas?

Ask about creative, non-obvious activities or experiences that work well in the destination and could provide a more unique experience for your attendees.

10 QUESTIONS TO ASK BEFORE...

Selecting a Destination Management Company (DMC)

1. Who does your hotel or CVB recommend?

Remember the DMC in a destination should be your partner, so they are a hugely important element of the program. Seek recommendations from their national tourist board/convention bureau, the airlines, hotels and other suppliers that you may know.

2. How many years has the DMC been in business and check references of similar programs served?

You want to ensure extensive local knowledge, professional relationships, expertise, and local resources.

3. Find out if the DMC's staff has any professional certifications.

Industry standings and affiliations are important. Certifications to look for include Certified Meeting Professional (CMP) and Destination Management Certified Professional (DMCP) which shows a level of experience and commitment to the meetings industry.

4. Ask for proof of insurance and financial stability.

A DMC should carry extensive commercial liability insurance, personal injury, and general aggregate insurance. Upon request, a DMC should provide to its clients a Certificate of Insurance naming its client as an Additional Named Insured.

5. Describe three events the firm has produced in the past two years and look at sample itineraries?

The key-word when working with a DMC is 'customized' as they are able to create any kind of event a client may require.

6. What is the full scope of services offered?

They should provide creative itineraries, resources and logistics management based on an in-depth knowledge of their destination.

7. What is their pricing model?

The typical expectation is that a percentage of the overall program costs ranging from 15-20 percent will be added to the final bill. To help offset this added cost, DMCs are able to leverage their high volume buying power with their supplier partners in an effort meet any budgetary limitations.

8. Does the DMC respond with personalized information and hold themselves accountable for results?

Be sure to request references of other groups, similar to yours that they have handled. Make sure the name and contact information is provided.

9. What happens when things go wrong? What are their emergency procedures?

DMCs provide protection (much like insurance) for events. To protect the company and the client, DMCs will ensure that all their vendor partners are properly licensed and insured to provide the services they are hired to execute. Additionally, the DMC will assume responsibility to communicate changes and correct any errors pertaining to the event and making sure that all supplier partners are working in tandem for the success of the program.

10. Who are their trusted business partners and vendors?

One of the primary jobs of a destination management company is to plan and execute events for your business, which means that they need to have good contacts. For one thing, you'll rely on them to make sure there's a respectable turn-out for the event; for another, you'll want them to get you the best deals possible on everything from flower arrangements to music. A DMC with good contacts will save you money and increase your chances of success.

10 QUESTIONS TO ASK BEFORE...

Going Green

1. Do you participate in a program that allows guests to choose not to have their towels and sheets washed daily?

Is the hotel everything it claims to be? We've all seen the discreet bathroom placards indicating that, in an effort to conserve water, our linens will not be washed unless requested....but are they really following up behind the scenes.

2. Do you recycle?

Aluminum, plastic, paper, gray water, composting...

3. What programs does the hotel have to reduce consumption?

Examples include energy-efficient lighting, low flow toilets and showers, alternative energy sources like solar or wind power.

4. Do you source your food locally?

If a hotel has a restaurant, has it considered transitioning it into a Certified Green Restaurant or Certified Green Commercial Kitchen? Buy organic, locally-grown food and/or plant an organic garden to provide fresh produce for your guests.

5. How do you conserve energy on a daily basis?

They might replace incandescent light bulbs with fluorescents, install motion sensors to reduce power use, or add new glass or insulation to cut heating and cooling costs.

6. Do you have a green certification or eco labels?

The major players in Green Certification are Green Key Global, Green Globe International, Energy Star, Green Seal, Audubon Green Leaf, Leadership in Energy and Environmental Design (LEED), EcoRooms & EcoSuites, Green Tourism Business Scheme (GTBS) & Sustainable Tourism Eco Certification Program (STEP).

7. Is your hotel near lines of public transportation?

This will enable more people to attend without having to drive themselves. It also makes it easier to enjoy the area in a cost effective and 'green' way.

8. Do you have a sustainable swimming pool?

Some use a saline-based system to clean the water, which reduces the need for chlorine and other harsh chemicals.

9. How do you maintain your grounds?

This enables you to see how thorough their program is within the facility. The grounds are also the first thing you see so it is good to have them be in compliance with your standards.

10. Do they have a green purchasing policy?

The hotel should be able to demonstrate that they have an environmentally friendly purchasing program for all their needs: cleaners, sanitizers, paints, pesticides, office supplies, etc. throughout.

10 QUESTIONS TO ASK BEFORE...

Hiring a Key Note Speaker

1. Should you use a Speakers Bureau or Hire on Own?

Perhaps you have a team of people planning the event and some experience in hiring a speaker. This could help keep the price down by contacting the speaker directly but sometimes it's not always possible to contact certain speakers directly if they have an agency contract. Also with an agency, you have a guarantee that contracts will be honored and money will be handled professionally.

2. What type of presentation do they give?

The speaker's presentation style should be one which could be received by the audience with maximum effectiveness. Does the speaker incorporate visual aids or presentations, do they encourage questions and audience participation or is it more of a lecture approach? Make sure their style matches the goals of your meeting.

3. How much pre-presentation research does the speaker do?

Do they interview attendees, study your website, request company material? Your keynote speaker should know the dynamics and culture of your company and customize their presentation with that in mind.

4. Ask about concepts of entertainment and motivation:

How do they keep an audience interested while imparting professional and practical advice?

5. What is the CORE message to be delivered?

Does this point match the theme of your event and will it resonate with your audience. Can they tailor a message to your group?

6. What is their most memorable speaking experience and why?

The answer will give you a deeper insight into who they are as a speaker and a person and will help you determine if they're a good fit for your event.

7. What is your budget?

Speakers fees vary widely and they depend on several factors: experience, travel, hotel costs and the size of your event. Evaluate fees vs. the speaker's talent and experience.

8. Can they provide references and testimonials?

A long list of happy clients is one way to assure that you've got a real pro.

9. What should you expect from your speaker?

Typically a key note speaker should have a bio sheet, promotion video, professional photo, diagram of an ideal room set up, audio visual requirements, possibly handouts.

10. Should your speaker be a CSP (Certified Speaking Professional)?

This certification is awarded by the National Speakers Association. Their career is examined with scrutiny and their clients are called to make sure they have been delivering excellence. You know that a speaker has met a certain level of professional success if they have their CSP.

10 QUESTIONS TO ASK BEFORE...

Selecting a Registration and Housing Service

1. Will the technology interact with my current systems?

It is important that you know in advance if all your systems are compatible and will interact with the vendor being considered. If not, do you know what it will take to make it work?

2. Will this enable me to negotiate better rates, contract clauses?

Maintaining documented history can help you not only negotiate competitive room rates but also make tough decisions such as how many rooms to block and which types of hotels to choose.

3. Do you save me time?

Oftentimes, they will customize their systems to your unique, specific needs. For instance, when you develop a relationship with a housing and registration provider, its representatives become familiar with your meeting and your history and eventually become an extension of your own staff.

4. Can you help me with attendee marketing?

Consider creating and marketing a list of reasons to stay inside the contracted hotel block and include this list directly in your meeting brochure or Web site.

5. Do you provide onsite assistance?

You want to know if the vendor provided the assistance onsite as part of their proposal or if this is an additional fee. If it is additional, can your internal staff cover some or all of these tasks?

6. Will this help me better track my results?

Combining housing and registration helps you track information about where attendees are staying as soon as they register for your meeting. Your combined system can notice if someone has registered but has not reserved a room and an instant message can be sent from your chief executive to remind the attendee how staying inside the group block avoids attrition charges.

7. Will it make it easier for my attendees to book?

A consistent system for housing and registration each year can create a level of comfort for attendees that can be very important. For attendees who travel infrequently, familiarity with the Web site and the individuals handling housing can make the entire meeting experience less stressful and more enjoyable.

8. Will you dedicate one team member that will work with us (and travel with us)?

It is best if you have a dedicated person that becomes familiar with your organization and your events that travels with you. This cuts down on the learning curve that can take place with each event if it is always a new person.

9. Do they conduct room audits?

For one reason or another, meeting attendees might book at the contracted hotel but through a different channel. Other sources of miscoding can include a corporate rate plan. Still if people attend your meeting and stay in your contracted hotel, you should get credit for those rooms.

10. Can the Housing Services be branded on behalf of you and your sponsors?

You can have the ability to generate additional revenue through either a housing sponsor, or providing housing sponsorship as part of a sponsor tier. "Real Estate" can be sold as part of a header on the housing site, positioning on the housing landing page, and/or part of the confirmation emails that are sent to each attendee.

10 QUESTIONS TO ASK BEFORE...

Hiring a Security Company

1. What security licenses and insurance do you have?

In most states licensure is required by law for all providers of security services.

2. Where do you hire your officers from?

Be sure officers have passed Dept. of Justice and background checks. Officers should come from reliable and experienced references. Be sure to take it upon yourself to interview each candidate thoroughly because ultimately you will be the one relying on protection.

3. Does the company provide uniformed, professional officers?

Security at your place of business or an event represents you and your company. A sharp, professionally uniformed officer reflects favorably on your business or event.

4. How experienced is the company in the security industry? Is the company stable with a long term record? If so, ask for references.

Experience not only proves the reliability of the company's security service, but also provides professional insight into the locale and the best ways to protect your assets.

5. Does the company conduct background tests and drug screening?

It is best to hire a vendor that has these policies in place. You want to match, as best you can, the same policies you have for your organization.

6. Are the security officers given quality supervision and training? How many refresher hours do they get per year?

Continuous supervision and education makes all the difference in the world when hiring private security. By maintaining a system of quality supervision of security officers and customizing training for different client locations, a security company can maximize the effectiveness of its presence

7. How quickly does the company respond to on site incidents? Do they know how to write reports?

If a company takes days to respond to a simple inquiry, how can you be certain they'll be there if an incident arises? In the security industry, responsiveness is critical.

8. Are they armed? If armed, do they qualify quarterly? Who certifies them to be armed?

If you intend to employ a security guard who will be required to carry a gun it's essential that they are trained and hold a gun licence.

9. Do they have medical training?

It should be your preference that they do have this training in the unlikely event that something happens. If they do not, you will need to make additional arrangements to have this covered.

10. What security associations do they belong to?

This will give you a better feel for how large, well known and active they are in their own industry.

CONCLUSION

Our hope is that the 100 questions we have asked in this handbook will help as you successfully plan meetings and events for your organization.

Please look out for future handbooks with more tips, tools and resources that will help you continue to be an effective meeting and event planner.