

The Keynote Guide to Planning a

Successful Conference



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A Keynote Networks Workbook

Contents

Introduction	2
The Role of the Conference Organiser	3
Establishing a Committee	4
Creating a Budget.....	5
Developing a Timeline	6-9
Booking a Venue.....	10
Managing Abstracts and Papers	11
Registration.....	12
Speakers and Presenters.....	13
Sponsors and Exhibitors	14
Marketing and Public Relations.....	15
Printed Materials	16
Audio-Visual Requirements.....	17
Accommodation	18
Transportation	19
Food and Beverage	20
Special Events.....	21
Breathing a Sigh of Relief.....	22

Introduction

Are you faced with putting on a conference but don't know where to start? Are you trying to juggle conference planning with your 'regular' job? Then this workbook is for you.

Getting organized: This step-by-step guide to planning your conference is a practical tool that will allow you to plot out the critical path to success, develop a realistic timeline and allocate tasks to your committee and helpers.

Work smarter not harder: These days you don't have to do everything manually. This guide includes tips and tricks on how you can use *Conference Manager*[™] to provide you with an 'extra pair of hands'.

About Conference Manager: *Conference Manager*[™] is an online application that will help you take care of the details as such as:

- u setting conference goals
- u setting up your registration process
- u sending invitations
- u booking transportation
- u collecting abstracts and papers
- u voting and management of abstracts
- u managing audio-visual requirements
- u communicating with delegates
- u collecting payment
- u evaluating the success of your conference

Throughout this workbook you will find advice about how you can use Conference Manager to get organized and give your conference some extra sparkle.

Call Dr Cathy Key 1 800 642 5115 to find out how you can use *Conference Manager*[™] to make your life easier.

Or send an email to cathykey@confmanager.com and ask your questions.

The Role of the Conference Organiser

When we think of a conference organiser, we typically think of the person responsible for all the conference logistics, however your role as a conference organiser extends far beyond that. You are responsible not just for the details but also for the big picture. You need to develop a vision for your conference with realizable goals and objectives that is maintained and supported by the details of the event.

- u Develop a vision for your conference that includes measurable goals and objectives
- u Establish a committee
- u Delegate tasks to committee members
- u Develop a timeline
- u Develop the conference program
- u Hold regular committee meetings to verify that committee members have the support required to accomplish their tasks
- u Hold a meeting after the conference and gather feedback on the conference process
- u Send out appropriate thank you notes

Developing a Vision

*If you want to develop a vision for a successful conference...
...ask your attendees.*

*A poll or survey of your potential attendees is a powerful way to
develop your vision.*

Put a survey on your website and start the 'conference buzz'.



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Establishing a Committee

One of your first tasks is to enlist some help! The easiest way to delegate tasks is to divide the biggest task (organizing the conference) into smaller areas of responsibility and then assign individuals to these categories. Below is a suggested list of areas of responsibility to which you can assign committee members.

Responsibility	Committee Member	Phone	E-mail
Venue			
Accommodation			
Conference Program			
Speakers/Presenters			
Exhibits			
Registration			
Abstracts			
Marketing			
Printed Materials			
Audio/Visual			
Supplies			
Transportation			
Food			
Sponsorship			

Use this table to keep track of which committee member is responsible for what. You may wish to provide a copy to each committee member as a contact list to enhance the communication flow.

Creating a Budget

Every conference has a budget. The budget is based upon how much income is expected from all sources set against the expenses that are anticipated.

In most cases you will need to be realistic about what is affordable within the limits of your budget income. You will find that some things that you want will not be affordable and must be scrapped. Always bear in mind that the price for services can almost always be negotiated.

Most conference managers try to establish the amount they need that is the minimum. However, you will find that your budget must be continually reviewed.

Here are some steps to follow:

1. Calculate expenditure: Identify expense categories based on conference programming (venue, website, registration, conference proceedings, speakers, secretariat, insurance, audio-visual, marketing, food/beverage etc)
2. Identify possible expenses within each category
3. Identify which expenses will be fixed and which will be variable (variable expenses tend to be based on the number of delegates e.g. meals, as opposed to fixed costs such as marketing materials and audio-visual requirements)
4. Calculate budget income based on all potential sources of revenue e.g. sponsorship
5. Based on expenses, expected attendance and sponsorship determine the registration fee to cover shortfall
6. Distribute the budget to the rest of the committee

Developing a Timeline

A good timeline is essential to keep you on track. A timeline can be as simple or as complex as you want. The key is to make sure the timeline includes 'hard' deadlines, i.e. important dates for tasks that you can't afford to over-run.

The form on the next page of this workbook provides a sample timeline which will give you some idea of the types of items to include. Note that the timeline is actually shown in reverse – starting with the date of the conference. This is a good way of working out important deadlines.

Your timeline provides an overview of the tasks to be completed. Assign a committee member to each task and have them sign off completed items.

Each area of responsibility, such as registration, will actually be comprised of individual smaller tasks. This workbook will help you break the larger tasks into comprehensive task lists. These task lists can then be added to your timeline.

Conference Timeline 1 of 3

Our Conference	Area of Responsibility	Person Responsible	Deadline	Sign Off
Set up registration desk				
Ship materials to site				
Audio-visual requirements due				
Final deadline for meal orders				
Final deadline for accommodation				
Send program to attendees				
Publish program on website				
Final registration deadline				
Send program to the printers				
Reserve transport for speakers				
Reserve hotel for speakers				

Conference Timeline 2 of 3

Our Conference	Area of Responsibility	Person Responsible	Deadline	Sign Off
Send room size specs to venue				
Order delegate bags/giveaways				
Early registration deadline				
Send out meeting invitations				
Publish provisional program				
Final paper selection				
Send papers for review				
Registration open				
Deadline for call for papers				
Invite speakers for plenary sees.				
Open call for papers				

Conference Timeline 3 of 3

Our Conference	Area of Responsibility	Person Responsible	Deadline	Sign Off
Launch conference website				
Venue selection				
Site visits				
Site RFPs deadline				
Finalize budget				
Prepare site RFPs				
Determine goals and objectives				

Booking a Venue

Person Responsible: _____

Important Dates

Prepare site RFP: _____ RFP's due back: _____ Decision Date: _____

Tasks

1. Establish your needs (number of attendees, space requirements, dates etc)
2. Do a venue search (sites, weather, social activities, accommodation)
3. Identify several facilities equipped to meet your requirements
4. Prepare a Request for Proposal (RFP)
5. Send out RFP's
6. Visit sites (if possible)
7. Decide on a venue
8. Sign a contract with the chosen venue
9. Inform all venues to which you sent out an RFP of your decision

Controlling Costs

Providing your venue and other suppliers with timely, accurate information will go a long way towards ensuring your ability to control costs.

Use Conference Manager to provide a single point of contact for you, your delegates and your suppliers.



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Managing Abstracts

Person Responsible: _____

Important Dates

Open Call for Papers: _____ Close Call for Papers: _____

Notify authors of decision: _____ Send to publisher: _____

Tasks

1. Prepare the call for papers (wording, layout etc)
2. Establish a deadline for paper submission
3. Publicize the call for papers (via a website, email, regular mail, journals etc.)
4. Find reviewers and establish their area of expertise
5. Accept paper submissions (via web site submission, email, regular mail, fax)
6. Send out confirmations of receipt of paper submission
7. Assign reviewers to each paper
8. Circulate the papers to each reviewer
9. Follow up with reviewers to ensure they are on track
10. Collect reviewer comments
11. Make the final paper selections
12. Notify authors of acceptance or rejection
13. Prepare accepted papers for publication
14. Send papers to publisher for print
15. Publish the papers online
16. Follow-up corrections/publications/full papers after the conference.

Call for Papers

*Collecting paper submissions by fax, mail or e-mail is very time-consuming.
Use Conference Manager to put your paper submission and review process online.*

- u *Saves time (no data entry!)*
- u *Ensures that papers are in the right format*
- u *Streamlines the review process*
- u *Automates communication with authors and reviewers*



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Registration

Person Responsible: _____

Important Dates

Open Conference for registration: _____

Early bird deadline: _____ Final Deadline: _____

Tasks

1. Determine early-bird and final registration dates
2. Decide on a registration procedure (e.g. online, paper-based – or both)
3. Choose an online registration system
4. Determine the price for the conference
5. Determine which payment options you will accept (e.g. cheque, visa, mastercard)
6. Set up a merchant account for credit card payments
7. Decide on a cancellation policy
8. Create the registration form, including additional items such as:
 - a. Meals and dietary requirements
 - b. Accommodation
 - c. Transportation
 - d. Sessions and workshops
 - e. The social program
 - f. Spousal packages
9. Publish your registration form (online and/or on paper)
10. Determine your onsite registration procedure and hire additional staff if necessary
11. Send confirmation of registration to delegates upon receipt of payment
12. Create conference packages
13. Meet your staff or volunteers onsite and get ready to greet attendees

Online Registration

Online registration is more professional, secure and more reliable than paper-based methods. It also makes budgeting and organization a lot easier. Conference Manager's online registration tools will:

- u Save time*
- u Keeps your registration information at your finger tips*
- u Automate confirmations and communication with attendees*
- u Ensure a secure, reliable registration process for the attendee*



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Speakers and Presenters

Person Responsible: _____

Important Dates

Sign up speakers: _____ Send information package: _____

Tasks

1. Research and select speakers
2. Sign and collect contracts with all speakers
3. Create and send out a conference information package to all speakers containing
 - a. Committee point of contact
 - b. Review of conference goals
 - c. Audience demographics
 - d. Presentation handout procedures
 - e. Hotel and transportation information
 - f. Finalized agenda
 - g. Compensation information
4. Arrange for speaker support (one point of contact to have their needs met)
5. Arrange for speaker audio/visual and other requirements
6. Collect speaker biographies for their introduction
7. Arrange for speaker accommodation and transportation and confirm arrival times
8. Arrange for speaker compensation

Tips and Tricks

If you are hiring a speaker ask for an audio or video preview of their presentation. Also, ask how the speaker is planning to customize their presentation to meet your objectives.

Use online surveys to help find out your audience's interests and provide the speaker with the results.



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Sponsors and Exhibitors

Person Responsible: _____

Important Dates

Final deadline for sponsorships: _____

Launch exhibitor registration: _____ Order exhibitor materials: _____

Tasks

1. Create a list of potential sponsors
2. Prepare a sponsor package outlining the benefits of sponsorship
3. Sign and collect contracts from exhibitors and sponsors
4. Create and send out an information package for exhibitors containing
 - a. Committee point of contact
 - b. Review of conference goals
 - c. Procedural instructions
 - d. Finalized agenda
 - e. Floor space allocation
5. Map out floor space for exhibitors
6. Find out exhibitor requirements and order booths etc

Tips and Tricks

Use your website to attract sponsors and exhibitors to your event.

- u *Put your sponsor and exhibitor information packs online.*
- u *Use online registration to allocate exhibitor booths.*
- u *Put your exhibitor floor plan online prior to the event.*
- u *Feature your sponsors' logos prominently on your website.*



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Marketing and Public Relations

Person Responsible: _____

Important Dates

Launch conference website: _____

Send Invitations: _____ Send press releases: _____

Tasks

1. Develop a promotional website
2. Create and send out press releases and mass mailers
3. Gather location promotional material (from chamber of commerce or tourism agency)
4. Approach transportation and accommodation facilities to negotiate special conference rates
5. Convey the message that the conference organizers will go out of their way to provide a positive experience to all participants
6. Provide an opportunity for the media to participate in getting the message out e.g. offering interviews with keynote speakers, negotiating for the production of a radio or television show

Event Website Checklist

The top 10 must-haves for your event website:

- u *Meeting title, dates, venue and contact details (on the opening page)*
- u *The agenda and information on speakers*
- u *Registration information and an online registration form*
- u *Who should attend and the benefits of attending*
- u *The meeting's goals and objectives*
- u *Sponsor and Exhibitor information*
- u *Accommodation information*
- u *Local information (maps, city information, local restaurants etc.)*
- u *Travel information*
- u *Call for papers (if applicable)*

Conference Manager will allow you to keep your website up-to-date and professional, yourself, even if you know nothing about the web.



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Printed Materials

Person Responsible: _____

Important Dates

Send registration package to printers: _____

Tasks

1. Identify signage and other printed materials requirements
2. Determine whether printed materials can be designed in-house or must be outsourced
3. Create brochures
4. Create marketing and conference identification materials
5. Create registration packages
6. Send out an RFP to several printing companies
7. Sign contract with printing company

Branding and Identity

Consistent branding is essential to give your conference an identity. This means using the same logo, colours, graphics and fonts on your printed materials that you have on your website.

Reduce costs and be kind to the environment by providing as much information as possible on your website.



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Audio-Visual Requirements

Person Responsible: _____

Important Dates

Order audio-visual equipment: _____

Test room setups: _____

Tasks

1. Ascertain the audio-visual requirements for each segment of the conference (presentations, reception, breakouts etc)
2. Contact speakers to find out about any special needs or requirements
3. Contact the venue to establish whether or not audio-visual requirements can be provided for in-house by the venue. Ask whether or not it is possible to outsource audio-visual
4. Contact audio-visual company to get a quote for outsourcing your audio-visual requirements
5. Sign a contract with audio-visual company
6. Arrange for an audio-visual technician to be onsite for troubleshooting
7. Assign a conference worker to verify that audio-visual is functioning properly before each session
8. Establish security measures for audio-visual equipment

Tips and Tricks

Use an online form to collect the audio-visual requirements of your speakers before the event.

Ask your speakers if they require facilities for their presentation ahead of time.



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Accommodation

Person Responsible: _____

Important Dates

Contracts with hotels: _____

Accommodation booking deadlines: _____

Tasks

1. Establish what accommodation is available around the conference site
2. Negotiate room rates for participants with hotels and/or other accommodation providers
3. Sign a contract with hotels for provision of accommodation
4. Establish booking/registration procedures
5. Establish accommodation booking deadline
6. Convey accommodation information and booking deadlines to participants
7. Confirm room bookings with hotels

Tips and Tricks

Publish accommodation information on your website. Be sure to include pictures, descriptions, rates, booking deadlines and contact information.

Usually delegates will book their accommodation directly with the hotels. However, if you are using University Halls as an option you may need to include these in your delegate registration process.



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Transportation

Person Responsible: _____

Important Dates

Finalize transportation contracts: _____

Tasks

1. Contact a local transportation provider to transfer your delegates between events and venues as well as airports and other providers as soon as you have chosen your host city
2. Contact the local Visitor and Convention Bureau or Conference Centre for authorized carriers in the local area
3. Negotiate deals with transportation companies for discounts for participants
4. Be sure to get copies of licensing, insurance and any permits they will need to provide you with the services you require.
5. Convey transportation information to participants

Tips and Tricks

Booking all travel arrangements via the online conference registration site will provide you with a manifest of the travel arrangements for delegates, speakers and organizers. This simplifies delegates' transfer arrangements to their accommodation

And guess what? Yes, Conference Manager can do this for you too.



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Food and Beverage

Person Responsible: _____

Important Dates

Contract with caterer: _____

Send final food and beverage requirements to caterer: _____

Tasks

1. Identify your expected food and beverage needs (how many attendees for how many meals and breaks)
2. Find out what the conference facility has to offer and whether they allow outside catering
3. Get menu options from caterers
4. Decide who you will be catering your conference
5. Book the caterer
6. Sign contract with caterer
7. Implement a strategy for identifying and accommodating dietary restrictions
8. Send final food and beverage requirements to the caterer

Protect your Bottom Line

Make sure that you give the caterer accurate information about meal requirements – last minute changes and inaccuracies in this area can be particularly costly.

Use your registration form to collect information about meal requirements and special dietary needs.

Use Conference Manager to provide real-time information about delegates meal requirements.



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Social Events

Person Responsible: _____

Important Dates

Deadline for social event registration: _____

Provide booking numbers to tour operators etc.: _____

Tasks

1. Contact the local Visitor and Convention Bureau or Conference Centre for suggestions for social events and trips
2. Research local tour operators. Most tour operators are happy to customize your tour to your needs
3. Visit venues and attractions and request tours from locals who are 'in the know'
4. Identify all social events to be offered by the conference, including spousal programs
5. Determine which events will require registration
6. Implement a registration procedure for social events

Tips and Tricks

Put photos and descriptions of social event and tours on your website

Online registration provides flexibility for your delegates and keeps you up-to-date with their requirements

Conference Manager has built-in registration forms for trips, tours, guest and children's programs



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Breathing a Sigh of Relief

Congratulations! You are now well on the way to getting your conference on the road.

Now you have completed the workbook you will have a timeline and a team of helpers to put your schedule into action. Make sure you give everyone a copy of their timeline and allocated tasks.

Getting Advice

I wrote this workbook following my own experiences running academic conferences and from working with meeting planners and conference organizers across the world.



*Dr Cathy Key,
President, Keynote Networks Ltd.*

Every conference is unique. *I'd love to hear about your conference and help you find new ways of addressing some of your challenges.*

Please contact me for a free, 30 minute consultation about your event.

A handwritten signature in cursive script that reads "C. Key".

Dr Cathy Key

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Online registration and payment
Instant Reporting - No more data entry
Instant communications - No more e-mail overload
Online abstract submission and review
Event websites that you manage yourself
Invitations and promotion



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