

Independent Planner Power

By Diana Rowe

Meeting professionals are continually challenged with having to adjust seamlessly to the ever-changing corporate culture. Outsourcing trends as well as demands from C-level management and procurement to produce more meetings, and prove their value, have shifted independent planners from occasional to integral members of a company's meeting planning team. Other factors contributing to this shift include internal organizational budget cuts, reorganizations and mergers, the economic cycle, and faster turnaround for scheduling meetings. In short, corporate planners are realizing that it's not only necessary but oftentimes more cost effective to hire an outside meetings expert who can also contribute new viewpoints and creativity to the mix.

Independent meeting planners can perform and manage almost any task, including site selection and contract negotiation, meeting room design, site logistics, food and beverage planning, sign preparation and traffic flow, special event management, onsite management, audio-visual management and more. The fees for these services are often covered by the hotel in commissions or absorbed by the cost savings realized when utilizing the independent planner.

The challenge is to find the right independent planner with the right experi-

ence for the right job. While the core skills in meeting planning are the same, the experience necessary to successfully plan 50 destination incentive meetings across the country versus one corporate sales retreat is vastly different.

An obvious starting point is to request references from meeting planning colleagues. Even with a referral, ask questions and check more references. Whether an independent planner is being hired for one meeting or many, your reputation is on the line.

Another alternative is to contact The Alliance of Meeting Management Consultants (AMMC), a fast-growing, premier professional organization for meeting professionals who own their own meeting management companies. AMMC is a member of the Convention Industry Council and has representation on the CMP Board. Membership is limited to experienced meeting professionals who have earned the CMP or other industry designation and have owned a meeting management business for five years or more. The organization serves to establish an identity for the meeting management consulting companies both in the meetings industry and the business community.

Why Use an Independent?

Independent planners come in all shapes and sizes, from large companies such as Experient, Maritz and HelmsBrisco to one-person opera-

The Right Partnership Can Play An Important Role In Your Meeting's Success



tions. But all bring their own special talents, experiences and contacts in the meeting world. Some are former hoteliers, while others have a background in corporate meetings. All offer corporate meeting planners an inside track on getting the most out of their meeting dollars.

Laurie Trautner-Black, CMP, vice president of Experient, Washington, D.C., feels her company has always been strong in the association market, but lately its services are becoming more valued in the corporate world. "I think as corporate demands more from their meeting professionals, planners realize that they can't do

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Laurie Trautner-Black, CMP
Vice President, Washington, D.C.
Experient
Arlington, VA

it all anymore as there's simply not enough time," she said.

Citing a client as an example, Trautner-Black explained, "After recent acquisitions, our software company client also needed to merge two meeting planning departments into one. We were asked to help evaluate current hotel and supplier contracts and consolidate planning departments. We weren't there to take over the meeting professionals' jobs, but rather to help ease the transition into a new corporate culture.

"Often, outsourcing not only becomes a viable alternative but a necessary one," she continued. "Independent planners can be the perfect partners providing support in as few or as many aspects of meeting management as the planner requires. With our proven track records, planners also know we can walk the talk and 'know' meetings without requiring a lot of explaining. We require a minimal transition period to come up to speed, allowing planners to focus on other aspects of the meeting."

Barbara Ozaeta, founder and owner of the Denver, CO-based MVP Meetings, began as a waitress at a large convention hotel and worked her way up through the "trenches" of brand hotels into a career in sales, transitioning a few years ago into her own planning company. Her staff's resume, combined with Ozaeta's more than 20 years in the hospitality industry including hotel sales and meeting planning, totals more than 60 years of experience.

According to Ozaeta, "The meeting professional today is

overwhelmed with a multitude of tasks, very little time and with fewer support staff to accomplish it all. Alternatively, the same person has to plan more meetings because of mergers or changes in corporate policies. We understand the entire meeting process, from the site selection to negotiation of the hotel's contract to the execution and logistics of the actual event.

"We have the time to contact several hotels in several cities," Ozaeta continued, "and we have the logistics and systems in place to do so efficiently. We can compile RFPs from a handful to dozens of possible alternative destinations and sites for meetings in half the time it takes a planner to chase down one hotel sales manager, because that's what we do every day."

Ozaeta added, "The hotel world is constantly shifting and changing. Someone cancels a contract and a different planner signs another contract, renovations happen, restaurants change or pop up, and let's not forget the on- or off-season differences. How can one planner keep track of all that? They can't. That's where we enter. Since we are constantly out there, checking inventory and talking with the hotel staff, we know what's going on, and we can act as an extension of your company.

"For example, Jane Doe, corporate planner, might only have two or three meetings a year on her plate," said Ozaeta. "Jane will make her calls to the hotels, often followed by more calls, go on site visits, initiate contract negotiations, etc., but her three meetings and 1,000 room nights won't get the attention of the hotels like my 26 programs and 26,000 room nights. Since every one of my planner clients is under my umbrella, each one becomes the hotel's prospective customer, and bundled together I have a much bigger bargaining chip."



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Alex P. Doyle
Vice President-National Accounts
21st Century Group
Forest Grove, OR

Leveraging To Improve The Bottom Line

Some aspects of an independent planner's services may involve fees, but hotel site selection by an independent plan-

ner doesn't usually cost the corporate planner a dollar. "You don't pay us," said Ozaeta. "The hotel pays us a commission that does not affect your contracted rate. In addition, we can leverage our knowledge to obtain complimentary rooms, upgrades, VIP amenities, and/or reduced or free meeting room rental and setup fees."

Contract negotiation and leverage translates into huge dollar savings — as much as 20 percent, according to Ozaeta — and an impressive bottom line for their companies.

With a background in the hotel industry, Alex P. Doyle, vice president of national accounts for 21st Century Group, a hotel site selection specialist located in Forest Grove, OR, partners with many corporate planners who find themselves stretched for time.

"The meeting expectations are already set," said Doyle, "but the planner's duties have increased from executing meetings to include other duties like marketing, sales, administration and, of course, financial meetings management. That's where independent planners become a key player in corporate meetings. We are dedicated full time to the business, and we have an inside track on the hotels and venues for meetings. We have the time and resources to fit meeting needs to a hotel or destination."

Doyle continued, "We know where all the deals are, and we have more negotiating power especially if the client is not a big corporation with a big name and numbers. We can consolidate all our clients and give each one that individual buying advantage."

Marie Mahan plans select meetings for sales and other departments at Richardson, TX-based Fujitsu Network Communications Inc., a provider of IT and carrier-class telecommunications solutions. Mahan has been with the company for 18 years, and her role has evolved from solely planning meetings to taking on other administrative roles and event support.



Marie Mahan
Administrative Assistant & Events Support
Fujitsu Network Communications Inc.
Richardson, TX

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hours. I have been pleasantly surprised at how much time using Doyle's expertise has saved me," said Mahan. "Plus all his hard work is not an additional expense to our company as the expenses are borne by the hotel. I consider Doyle a true extension of me and my planning process. He keeps me out of the middle as the hotels contact him directly, and he negotiates on our behalf at an even greater discount than I could. Just by not having to field phone calls, I save hours and hours of much needed time to concentrate on the other aspects of the meeting and my other job duties."

Communication Is Key

According to Donna Cohen, owner and president of Smart Meetings Inc., Ellicott City, MD, "I believe for a service provider to advance from an occasional supplier to an integral part of the planning team is through service. As an independent planner, we must be committed to providing great service to our corporate planner clients, first and foremost. When we make sure that our clients get what they want, we ultimately get what we want, too."

Cohen begins by identifying the corporate planner's primary needs. "It's not always what they think it is or what they tell you," she explained. "My job is to ask enough questions to develop trust and confidence so that I can understand their base requirements and what they want from my services. Sure, the planner might contact me about selecting a hotel site, assist with the logistics of planning a meeting, or whatever, but that's not really 'it.' 'It' could be wow-ing the attendees with a unique destination, or increasing attendance by

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Donna Cohen
Owner and President
Smart Meetings
Ellicott City, MD

"I used to do all my meeting research," said Mahan. "I felt I had better control and developed better rapport with the hotel, but with the added job duties, I have less time to han-

offering outstanding content or even cutting the bottom line so that their stress level is reduced. Whatever 'it' is, my job is to dig in, ask questions and really listen."

Rachel E. Ramirez is president of the Huntington Beach, CA-based Performance Excellence Partners Inc., which is dedicated to helping people and organizations optimize performance and achieve excellence. "I am not a meeting planner by trade," said Ramirez. "We were discussing whether to conduct a meeting or not for our new client. When we contacted Smart Meetings for assistance, Cohen suggested we implement a feasibility study. With her input and the results of the feasibility study, we narrowed down the focus of the meeting. Cohen handled the logistics, and we were able to concentrate on content."

Since then, Ramirez has continued her relationship with Smart Meetings by partnering with Cohen. "It's important for a company to realize what they are good at. We are good at the business of management consulting, but our specialty is not meetings. Even though we might enjoy planning an occasional meeting or event, we had to make the financial decision to not be swayed by a personal interest, and instead hire a professional independent planner to handle the job more competently."

Besides gaining a professionally organized meeting, Ramirez also reaps the financial benefits of Cohen's negotiation leverage and buying power advantage when dealing with hoteliers and other vendors. "The bottom line," said Ramirez, "is that Cohen keeps up with the hotel and meeting supplier industries, something that we don't have the time or contacts to do. She negotiates deals that save us money, and she brings in fresh and creative ideas for other aspects of the meetings."



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Lynn Stadler
Strategic Meetings Consultant
Martiz Travel Company
Fenton, MO

Meetings Management Measurement

An increasingly important part of the meeting professional's work often includes the trend for more corporations to apply procurement and meeting management procedures to meeting planning. Corporate planners begin this measurement as they outline the meeting's goals, selecting objectives for which success is measurable and defining what will constitute achievement of each goal, and finally, applying the measurement of meeting success to return on investment (ROI). The good news for the meeting professionals is that an independent or third-party planner can also implement measurement tools.

Lynn Stadler, strategic meetings consultant for the Fenton, MO-based Maritz Travel Company agrees.

"Today's planners are increasingly asked to focus on the strategic side of meetings, and so they are reaching out to third parties to help ensure they are receiving the right results," Stadler said. "Several years ago, a meeting planner's job was more administrative and logistic, and now the planner is being asked to step up and assist in meetings measurement.

An independent or third-party planner can quite simply save the corporate planner time by handling the logistics and planning functions, so they can implement the strategy.

"However," Stadler, continued, "we can't do the job without the planner's guidance. We consider ourselves partners relying on the corporate planner's intimate knowledge of the workings of their organization. From there, we combine our experience and connections in the meetings world, and together we'll pull off a successful meeting."

Stadler said that Maritz, as well as other independent or third-party planners, offers several ways to help their clients strategically. "For those clients that have a significant incentive base, we can survey the entire participant base through our Maritz Travel Insights program to get information before the event to optimally design an incentive program that will impact that group and make them work harder to earn the incentive trip.

"We also have other measurement systems in place with the same sort of front-end methodology, from measurement to meeting design optimization," Stadler added. "The obtained results will allow the meeting planner to articulate and deliver back to their C-level management the meeting's objectives and goals up front, and to track those goals throughout the entire meeting process. In the wake of corporate governance, we've discov-

ered that many organizations are trying to capture spend for meetings. That's why we offer services such as strategic meetings management, meeting process standardization and more, as the traditional role of the corporate planner has progressed to so much more."

There's no doubt that with downsizing and mergers, many corporate planning departments are bowing under the load of having to manage more and more meetings and conferences without the additional budget and staffing needed to properly execute company directives. An independent planner's negotiation power and knowledge base of hotels, resorts and meeting suppliers can fill the void by providing a winning and valuable partnership that not only saves time and money but perhaps most important, saves a beleaguered planner's sanity.

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