

Out-of-the-World Site Inspections

PMM5 Postscript[™] Number 17

Background Information: Without a place there won't be a meeting. Site selection is a preliminary step in the meeting planning process. Chapter 11 of *Professional Meeting Management*[®], fifth edition, addresses:

- The value of knowing meeting objectives, history, physical requirements and attendee expectations
- The eight basic steps in the site selection process
- Different meeting facilities
- Items to include on a site inspection checklist

PMM5 Postscript[™] Use: This PMM5 Postscript[™] offers additional considerations for improving site visits by focusing on the subjects of:

- Branding
- Environmental support for the meeting
- Support for the meeting planner

Also this PMM5 Postscript advocates "secret shopping" of sites and finally outlines the reasons that one site selection process or checklist doesn't fit all meetings. Finally, the PMM5 Postscript[™] includes additional group discussion or research projects to supplement the PMM5 chapter.

Learner Outcomes: At the completion of this reading, you should be able to:

- Describe the link between branding, meetings and site selection.
- Identify how sites contribute to the environment supporting meetings.
- Describe how to customize a site visit to satisfy the requirements of a meeting.

Related PMM5 Chapter: Chapter 11, Site Selection
Author: Kevin Lewis



Site Selections — The Basics

Site selection is the start of a great meeting. Site selection is a process that is honed through understanding the purpose of the meeting, understanding the audience and a focus on how the site influences those factors. Site visits form the cornerstone to a successful meeting. Lewis provides a list of elements necessary for a site inspection:

- Identify meeting objectives
- Determine physical requirements (dates, attendance, sleeping rooms, space needs for meetings, events and exhibits,)
- Attendee interests and expectations

Further, he provides a site inspection checklist in *Professional Meeting Management*®, fifth edition (Lewis, 2006, pp. 153-157). Effective meeting managers use both processes and checklists combined with instinct and wisdom in conducting site visits. This PMM5 Postscript™ is intended to help meeting managers add to their checklists and to their instinct when completing site inspections. The next three topics (branding, environmental support and support for the meeting planner) help a meeting manager value these intangible elements.

Branding

Meetings are ideal opportunities to further the brand identity. A brand is not merely a symbol or a name, but the culmination of communications and experiences a person receives from every contact with an organization. A brand is the proprietary visual, emotional, rational and cultural image associated with a company, association or product.

A strong brand will help:

- Market to the right people — the ones who value the “brand” promise
- Augment strategic direction
- Increase customer (or member) and employee loyalty

In *Professional Meeting Management*®, fifth edition, Lewis discusses the value in understanding the objectives for a meeting in selecting the correct site. In addition, Ellen Toups notes that the meeting itself is an opportunity for brand consistency (Toups, 2006 p. 64).

Companies and associations “stand” for something. Miguel de Cervantes, the Spanish novelist and author of *Don Quixote* said, “A good name is better than riches.” Branding is the reason that people want to drive Volvos? What is the perceived value of a Tiffany box? How does that contrast with the “real” value of the blue box? Customers pay a premium for security and quality.

Meetings should extend the brand of the organization. View site selection as an opportunity to extend the brand of the organization. Focus on the “three C’s of branding — Clarity, Consistency and Constancy. Seek sites that enhance the clarity, consistency and constancy of the brand.

More information on branding is included in PMM5 Postscript™ Number 6.

Environmental Support

The meeting site must meet obvious logistical needs and requirements. A second level for site visits is to understand how the environment supports learning and the meeting objective. Estimates indicated that while motivation, meaningfulness and memory account for approximately 75% of learning, the remaining 25% is dependent on the effects of the physical environment (White, 1972). Meeting managers will want to maximize the potential for the meeting by selecting an environment that provides support for that meeting.

In narrowing down sites, ask two questions:

1. Does the location leverage the topic and goal of this program?
2. Is there another location/locale that might better support the meeting objectives?

In other words, can the location help further the topic or advance the theme. A location that provides that level of support can consciously and subconsciously help reinforce the messaging from the meeting.

Meeting managers also want to match the venue to the needs of attendees. Does the venue provide an environment that will:

- **Focus on the comfort of the attendees.** This includes chairs, temperature control, lighting, breaks in the program and potential adjacent noise.
- **Provide the “right” meeting space** to create an ideal physical arrangements supporting:
 - Ability to see and hear
 - Correct tone of formality vs. informality
 - Level of involvement
 - Ideal group dynamics
- **Create an experience.** PCMA’s *Professional Meeting Management*®, fifth edition, states that “the elements of space use and function room set-up design have evolved over the past five years to include the notion of an experience. Beyond that, it is the meeting manager’s responsibility to create a positive environment through efficient and effective space use and setup design.”

Comfort will satisfy the basis needs of participants to be in a “state” that allows them to learn. The room set will impact the tone of the meeting and the ideal physical arrangements. And finally, the space affects participant’s emotional response to the space and can create an experience.

Environment support does not simply extend to the meeting space. Attendees at a meeting will be engaged with others and participating in the “meeting experience” beyond the walls of a meeting room. Coleman Finkel suggests there are eight separate environments that have an impact. Finkel proposes that all these areas must be considered as part of a total package and consideration must be given to decor, furnishings, equipment, layout and the interrelationship of each area to the other. Finkel’s eight separate environments include (Finkel, 1987):

1. Principal meeting room
2. Break areas
3. Team project work area
4. Sleeping rooms
5. Area for socializing

6. Area for meals
7. Recreation and exercise
8. Overall environment of facility

Meeting managers should evaluate each of these eight areas while on site visits.

Support for the Meeting Planner

While the experience that the meeting group has at the property is of utmost importance, meeting managers can further differentiate properties by focusing on the level of support available to them as the meeting planner.

Use the site visit to understand how the staff on property will work with the meeting manager to execute the meeting. For example:

- Insist on meeting the conference services staff, and preferably, the person who will be handling the meeting.
- Review the property's accounting procedures and billing procedures. Review sample bills and walk through the process for resolving discrepancies.
- Verify main contacts including catering staff. Some properties provide one point of contact.
- Determine if any services (golf, spa, accounting) are outsourced by the property. A gap in service quality may occur if the venue does not control all functions. Only by asking will a meeting manager be aware of any potential gaps.
- Ask for suggestions from the property on how to enhance and improve the meeting experience for the group. Determine how the staff on property can support the meeting through their own creativity, use of props, use of property and recommendations for accommodating the needs of the group and meeting.
- Tour the business center, if during the meeting, the meeting manager or attendees are likely to call upon their services.
- Gain agreement for decision timelines, contract negotiations, pre-con meetings and other milestones in the planning process.

One Process Doesn't Fit All Meetings

While checklists are an important tool to help meeting managers be efficient and thorough, the site selection process is not a completely standard process that fits all meetings. The discussion within this PMM Postscript™ shows the areas that a meeting manager can customize based upon the meeting and required experience.

The elements a meeting manager focuses on during a site inspection will vary depending upon the meeting. For example, if the meeting is a larger size, then meeting planners will focus on the logistics of running the meeting. If the meeting is a smaller meeting of executive management, a savvy planner will focus on each participant's individual experience.

A site selection tour is customized based upon:

- Purpose of meeting
- Size
- Expectations of attendees
- Length of meeting
- Agenda including the range of elements (meeting, recreation, free time)
- Number of suppliers involved as either hoteliers or ancillary suppliers (AV, ground transportation, etc.)

Secret Shopper

The site visit is a meeting manager's time to view a property. While the property will pre-plan the tour, a savvy meeting professional will request to see areas of the property not on the tour. A meeting manager knows the areas that will be of most importance to the group and stakeholders. Including those areas on a site visit will increase confidence and comfort that the property will perform as required by the group. Acting as a secret shopper is a final tip for all meeting managers when executing a thorough site inspection.

A property wants to "wow" planners viewing the property. They are expecting the visit and will showcase areas meant to impress the meeting manager. Allocate some time during a site visit to be a "secret shopper" at the venue. A meeting manager can secretly shop any property by:

- Arriving early or unannounced to scout areas that may not be on the site visit
- Viewing the public rest rooms
- Testing out services like room service, bar service, or spa services
- Observing the customer care exhibited by wait staff, housekeeping, front-desk staff, valet and bellman
- Examine amenities that the group is likely to use including work-out rooms, other recreation areas, the spa, business center or restaurants.
- Assess the property's attention to detail. For example, look under the beds to ascertain housekeeping's thoroughness.

Summary

Site selection, although a standard routine, should not be a standardized process. Meeting managers have the opportunity to select sites that:

- Enhance the brand of the organization whether a company or an association
- Meet the requirements of the specific group for this specific meeting
- Support the meeting environment
- Support your efforts to execute a great meeting

When a meeting manager focuses on these issues — on how, where and why this site supports the organization's brand and the meeting goals, objectives and outcomes — they will have moved site selection from being simply a logistical task to one of strategic importance.

Group Discussion or Projects

1. What areas of a venue might a meeting manager want to see during a site visit and why?
2. Describe the brand proposition of one of these organizations and extrapolate that branding proposition to their meetings. In other words, what types of sites would support the brand?
 - Southwest Airlines
 - Pepsi
 - Starbucks
 - Sony
3. How might you use these areas within a venue for your meeting?
 - Outdoor terraces
 - Walking trails
 - Conversation nooks outside the meeting space
 - On-site bowling alley
4. Describe what you would tour upon arriving on property early for a site visit.
5. Using the site inspection checklist available on-line in the PCMA *Convene* archives at http://www.pcma.org/resources/convene/archives/displayArticle.asp?ARTICLE_ID=3031, customize the checklist for a meeting with the following criteria:
 - Technical conference for the Association of Information Systems Audit Professionals
 - 4-day Information Security Conference
 - Attendees: Information Technology audit, control, and security professionals. These individuals, typically, work for large corporations (Chief Information Officers) or are consultants. (Well paid professionals with computer or management information systems backgrounds.)
 - Seven concurrent tracks with 8 sessions per track. CEUs are offered.
 - Many sessions offer dynamic demonstrations of computer technology and applications
 - Pre-con event: Certification review course

What elements would you focus on during your site visit?

References

1. Finkel, C. (1987). *The Total Immersion Learning Environment*. Conference Center Development Corp.
2. Lewis, K. (2006). Site Selection. In G. Ramsborg (Ed.), *Professional Meeting Management* (5th ed.), pp. 337-358. Dubuque, Iowa: Kendall/Hunt Publishing Company.
3. Kirwood, H. (2006). Site Selection Made Easy. *Expo Magazine*, pp. 73 -84.
4. Marker, S. (2006, November). Is the Staff Up to Snuff. *Successful Meetings*.
5. Stitler, R. (2006, Fall). How to Narrow your Search. *EMC Venues*, pp. 6-18.

Copies of *Professional Meeting Management*®, fifth edition, may be purchased through the PCMA Bookstore at [PCMA Bookstore](#) or http://www.pcma.org/store/index.asp?DEPARTMENT_ID=3

Copyright 2007, Sue Tinnish. All rights reserved. The information contained in PCMA's PMM5 Postscript™ is based upon a forthcoming issue of Tips for Innovative Meetings and Events. You are invited to become a subscriber to Tips for Innovative Meetings and Events by contacting Sue Tinnish at 847.394.9857, sue@suetinnish.com or at <http://www.suetinnish.com>.