

Planning a Successful Small Meeting

Successful meetings can be important milestones. They offer the opportunity for people to meet and discuss key issues, both during formal sessions and the social program. Although meetings come in all shapes and sizes, the common denominator for success is that there is comprehensive advance planning. This demands commitment from the speakers, as well as from those sponsoring the meeting. Time must be spent preparing for the event because there is often considerable financial investment involved.

1 Planning ahead

Plan the event at an appropriate time of year; it should not conflict with other events that will already be in the diaries of your anticipated speakers and delegates. Sometimes it can help to organize your meeting around another event already taking place, as it may make it easier for people to attend, but it is always best to have it *before* the other meeting. Ideally, for a small event, at least 2–3 months should be allowed for planning.

For larger meetings (>50 delegates), considerably more time will be required, and some professional assistance with planning and organization is usually advisable. Planning for larger meetings may need to start up to a year in advance, not least because hotels with good facilities book months, sometimes years, ahead. You cannot assume that you will always obtain the rooms you need in your first-choice hotel. Professional meeting organizers can assist with all arrangements: delegate management, audio-visual support and supporting your faculty with program and slide development.

For smaller meetings (eg, an advisory board or internal company workshop), you may decide to run the event yourself. *Facilitate* has prepared a checklist that can be used in preparing for events of up to 20 people.

2 The program

The organiser's perspective

The objectives of the meeting should be clarified and these should be linked to the anticipated/required outcomes. Check the list of potential topics on the program against the meeting objectives.

Depending on the requirements of your meeting, a program committee should be identified. When the program outline is agreed, begin to identify potential speakers. Consider who on the program could act as a “draw”; ensure that speakers have the credentials to cover the topic you have allocated to them. Consider whether your choice of speakers represents a fair balance of experts in the area. Think about reserves if your first-choice speakers are not able to attend.

Clarify who will chair the sessions. The chair(s) will have an important role in ensuring the meeting flows smoothly and that there is the opportunity to ask (and answer) important questions. Consider asking the chairs to invite the speakers, where they have personal connections. Involve them in at least some aspects of program planning, rather than presenting it as a *fait accompli*.

When developing the program, consider how much time should be allocated to each talk, the key points the speaker will cover, how long can be assigned to taking questions from the audience, and how each presentation links to the next one. Then check that your audience will want to attend a meeting of this length.

The audience's perspective

The program should be reviewed from the perspective of the audience. Sessions lasting more than 2 hours are not advisable because the audience may lose concentration and will certainly need to take a "comfort break". This is especially relevant to an international audience where listening to a series of presentations in a foreign language is particularly demanding.

Variety is valuable in preparing a program. Consider presentations that include best practice from around the world and practical case histories; maximise the interaction between speakers and audience such as through keypad voting (though that requires careful planning), panel discussions and workshops; vary the media, such as the use of video. Lastly, always ask yourself how delegates will benefit from attending the meeting.

The speaker's perspective

Experts are busy people and it is important to "sell" the meeting to them in a logical manner so that they can make an informed decision on whether to participate. Be prepared to tell the speaker "what's in it for them". Generally they will want to know the following:

- The location and timing of the meeting
- The objective of the meeting
- The attendees/delegates
- The topic you would like the speaker to cover, the time allocation in the program and how this relates to the other presentations
- Whether there is an honorarium and what expenses will be covered
- Who will make the travel and accommodation arrangements
- What other expectations are related to the meeting; eg, preparation of an abstract, submission of biography/resume
- The technical support provided; eg, PowerPoint
- The language of the meeting (will interpreters be provided for non-English speakers?)
- Whether there is a slide review (we always recommend this to check slides and avoid overlap)
- Whether there will be proceedings or a report from the meeting that will involve them in additional work, such as preparation of a manuscript or checking of copy.

It is advisable to develop some briefing notes, based on the above points, for all speakers, so that there is no misunderstanding or unnecessary overlap between presentations.

3 Selecting an appropriate venue

The selection of venue will depend on availability at the time you want to hold the meeting. The further ahead you plan a meeting, the greater the choice of venues and the opportunity to negotiate on price. While you weigh up the relative benefits of different venues, you can ask the hotel to keep your booking on first option while you decide. Other companies may already have the hotel on option for the dates that you want, leaving you only second option – ask the hotel to put pressure on the other company to make a decision.

There are usually many potential venues to host the meeting. The following is a useful checklist when selecting a venue for your meeting:

- Is the venue convenient for the majority of the delegates attending the meeting (consider whether there is easy access from major airports, etc)?
- Does the venue offer sufficient space for the plenary session and any breakout rooms?
- Are the meeting rooms quiet (no disturbance from a noisy environment)?
- Are the public rooms and bedrooms in good repair?
- Meet the conference and banqueting staff – are they a professional team?
- Does the venue represent value for money?
- Are appropriate technical resources available for the meeting?
- Are competitor companies in house?
- Given guidelines for interactions with health care professionals, is the venue an appropriate “business venue”?

4 Choosing the date

This is probably the most crucial factor that can scupper the best-laid plans. Physicians and colleagues are busy people; professional plans, personal commitments and public holidays can all make fixing a date very difficult.

- Are there any conflicts with your selected dates of the meeting? For example:
 - Religious and public holidays
 - Conflicts with medical congresses
 - Major events in the host city (eg, sporting, cultural, commercial)
 - Weather
- Will the selected date give you enough planning time to find a venue, book faculty and invite delegates?

5 Maximizing attendance at the meeting

When the program and speakers are identified, consider who will attend the meeting and how the intended audience will find out about it. A publicity/invitation strategy will be invaluable. The invitation/meeting information pack could include the following:

- A visual identity that will brand all communications about the meeting
- A message from the chair(s) endorsing the value of the event
- Information on who will benefit from attending the meeting
- The registration process (eg, by mail, e-mail or registration on the web)
- What benefits delegates will receive for attending the meeting (eg, academic accreditation)
- What is the policy on accompanying partners and is there a program for them?
- What are the accommodation options?
- The venue for the meeting
- Any special travel arrangements
- Social activities
- Any fees that must be paid
- Information on any advance reading that will be required.

**If you have any comments on this fact sheet, please contact
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