

## **Introduction to the Scan Edition of “Achieving Objective in Meetings”**

When “Achieving Objections in Meetings” (“AOM”) was published (in July, 1973), it was a startling departure from all previous books in the meetings field: All meetings-related books (and articles) had been essentially discursive approaches that left the enabling methodology to the readers. No matter how good such material was, it was expected to be cut-and-pasted into the readers' (probably defective) personal meetings-production habits. Therefore, the results were uneven across the commercialized meetings industry: There were no industry standards. This Author considers the production-oriented meetings 'industry' to be distinct from the professional 'field' or 'trade' of university researchers in the social sciences, the user-persons and -companies, and the necessary suppliers.

Background: This writer was a co-originator of the world's first business-stage consulting firm, United Attractions, Inc., Chicago, a producer of banquet entertainment for major national associations. Two of United's long-term clients requested help with their lectern materials, because lectern-help was available generally an adjunct to an expensive dog-and-pony show—not appropriate. United developed nearly all currently recognized presentation methods while gearing up. Other associations imitated; then corporate members who witnessed the association programs began to buy from United, directly.

To the consternation of a purchase-something meetings-industry, “AOM” demonstrated that, given how-to helps, any meeting-caller and/or his/her assistants could manage any meeting that was called. Therefore, the purveyors to the trade could be hired for specified purposes, not merely engaged to operate given programs in standard ways. It was a revolution in client/purveyor relationships, which has been somewhat reversed by the hyped craze for 'spectacular' meetings.

The demand for excess was engendered by the New York World's Fair of 1964. There, the Kodak overhead screen introduced 'spectacular' to the world. Kodak was selling film—are you? In addition, Marshall McLuhan's mantra (“The Medium is the Message”) emphasized the need for hype in all media--thereby endorsing excess--including four-color ink when black would suffice. Now, Kodak is gone; and McLuhan's mantra has been discredited. Nevertheless, his influence pervade the industry.

“AOM” set new field and industry standards in a de facto fashion by presenting tested how-to methods and formats, together with the world's first PERT Diagram for meetings-coordination (now often termed 'meetings management'; more below). Although the book was hailed by users and user-groups (see a few reviews in the end matter, the commercial meetings industry leaned toward a criticism of a typographical error and its awkward run-on following line: “If you can [handle] such turgid lines as: (quoting that paste-up gaffe; see d), under “Errata,” below). “Unfortunately, the publisher's company folded soon after its publication. Prior to the web, “AOM” was then unavailable. So the industry borrowed much of the terminology and methodology, changed a few words and titles, and presented a few slightly 'new' ideas relating to the less offensive new skills learned by “AOM's” early readers.

Underlying problem: “AOM” established convincingly not only that most meetings-management work could be done by the meeting-callers' own selves or staff, but also that the speakers and their support material(s) were an often-ignored element of the industry's meeting-planning and -coordination. No, “PWP” did not emphasize the meeting-caller's own need to prepare . . . both because it was assumed (falsely?) that he/she could present it properly and also that by the '70s, the damage of the '60s had already been done:

All meetings-industry magazines were advertising-supported 'freebies,' which meant 'target on your back,' not 'special handling.' Ken Auletta and Tim Wu have both written, in their books, that at ad-supported magazines (loosely), “The advertiser is the client, not the reader.” Company staff meeting planners were flattered by special attention; and companies gladly accepted freebie magazines, even though their own meeting planners were being focused on production materials--while essentially ignoring meeting content—the purpose of the meeting.

The purpose of each meeting must guide the preparation of its own agenda and its fulfillment elements—those 'needed,' not simply 'wanted.' Profit, in the meetings industry runs with sales, not ideas. So the economic considerations of the majority-vote purveyors and their company-user members were divergent. The initial PERT Diagram reflects important aspects of then-current reality for large central meetings or association convention. It included size-irrelevant practical-control areas, such as transportation, labor, and spouses' programs. Mix-and-match. Because PERT Diagrams helped to control the development of the Polaris submarine, it can probably handle your functions, too. Just change the line-legends to reflect your realities. Be sure to enter calendar dates for the 'weeks prior' notations; then actual delivery dates entered will become a matter of a visualized running-calendar. If you construct and operate your

Update: Because of the unexpected workability of remote-work as a result of COVID-19 and then the Omicron variant, probably all companies who used remote-work have learned that 'spectacular' was not an essential component of their employee communications: As several independent and university studies have already concluded, productivity at home was usually the same, occasionally improved, and rarely lessened.

In that finding lies the future of large, central meetings. An article published in “Sales Management” magazine (under Bill Bros, publishers; now sold) established, in mid-'75, that: a) if major set-up costs cannot be repeated, then the large central meetings is least expensive, regardless of increased travel cost; b) if set-up costs can be repeated, then regional meetings are always the least expensive; and c) if set-up costs are small or negligible, then local meetings are always the least expensive.

If 'spectacular' is not essential, why hold large central meetings? There's no 'family' feel if hundreds of field people don't get to meet all executives or most of the others—with whom the majority of attendees will never work. What purpose, that expensive feel-good session?

In short: Believe in the value of your purposes for calling any meeting and in your ability to control that function! Then capture that need in your agenda. Be sure that the agenda is all-inclusive of information and their practice of new skills, preferably at the function but surely in the field office, if not. Then let the proved methodology of “AOM” guide your related work.

Old by the decades, and still 'new' to many meeting-callers, AOM was/is based on principles and university and military research to its time, not on hype or fad. Its Author was a member of the Chicago company that created (in 1960; vs McLuhan and World's Fair, 1964). It was the world's first meetings-production company that was dedicated to the business-stage. Until then, help with the business stage was limited to those companies that were also presenting a dog-and-pony show—the 'spectacular' of its time. Spectacle does get attention, but for itself, not for your message. Google the term 'distraction.'

Many associations have already conducted regional virtual meetings and might or might not go back to in-person functions, at which the exhibits are important because they help to pay for the fact of the in-person function. As of this writing, that association-related decision has not yet been made. Does that

matter to your own circumstances and company?

Or are you and “AOM” ready to take charge together? Then factor the following errata corrections into your reading of the text, to be fully updated:

**Errata:**

Okay--“AOM” was not perfect:

**a)** A major gaffe: Terming as 'deceased' a believer-executive at MPI who was described on our inquiry as, “He's dead”—facetiously intending “silenced.” Used--fact unchecked! For shame, Author.

**b)** Indexing concerns: Because so many terms/words were repeated so often in so many contexts, this Author believes that a traditional page-listing of terms/words was only number-strings; time-wasters. Criticisms: "Can't locate . . ."; BUT:

**c)** An Expanded Table of Contents (without that title) indicates all categories of contents and can locate the specific Part of the book being discussed/sought. It assumed that the user can recognize concepts. That guiding Table might not satisfy everyone now, either; but we believe that it was/is adequate for the indexing purpose and the best that could be done under the given circumstances. The Author believes that a common fixation on the fact of an end 'Index' itself, not concepts, had prevented hasty readers from using the Expanded Table, easily seen, up-front.

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Yes, “AOM” is marking a half-century since printed—from a publisher that was defunct within months. So, to repeat, “PWP” was a much-praised book that could be referenced but no longer purchased. Yet, it was paraphrased and much-imitated. Too old to help you now? Well, scientists state that the human brain has not changed much in ten thousand years. The industry and prices surely have . . . but toward invented ‘values’ that do not, in this Author's opinion, reflect the needs of either the meeting- caller or of the distinctly different meetings-field--of researchers, corporate users, and their *necessary* suppliers.

Forget the commercialized meeting-industry's needs—most are sales-related and not yours. Whatever happened to consultative selling—except bean-counters as spoilers? “PWP” was based on educational principles, not private interests: it works! Why? Useful tools survive time: Consider knives and buttons and shoe laces and belts and sacks and wheels and doors and staircases and . . .

**NOTES:**

**a)** Not one word of original text has been changed. However, the Dow Jones-Irwin update of “AOM” (“Sales Meetings That Work”; 1983) used a slightly-enhanced PERT Diagram. Although this book's original text is absolutely unchanged in this reprint (including typos and

gaffe), the Author believes that current users should have the benefit of the improvement, not a purist's restriction to the original. So, the PERT Diagram that immediately preceded Part V has been repeated there; but use the enhanced DJ-I version. The DJ-I version (1983), is appended to this Introduction. Apart from the newer PERT Diagram added to the Introduction, there's nothing new or changed in/from the original book.

b) The paperback Second Edition of “AOM” was an exact reprint of the hardcover original by DJ-I, when it put the hardcover O-O-P. Later, via P-O-D (third edition). US copyright rules require the changing of edition numbers when publishers change; it's not an indicator of likely ‘changes.’ Unchanged text identifies some never-solved industry problems. Problems? What problems beyond “insufficient ice-water on the table”? The magazines are free, but the freebie information might be relatively costly when implemented over time.

Want help with your meetings? Check the enhanced DJ-I 1983 PERT Diagram, at the end of this Introduction. The original is included in its place, but why use it as-is? Note that the PERT Diagram is a timed arrow. The function lines above/below parallel the central 'Coordination' line and will accommodate every contributory function by the calendar start and due dates. Broad categorical elements will accommodate virtually any need that your program has. You still have an outlier or two? Replace unused the terminology with the new or add new line(s), if needed.

PERT Diagrams provide a delivery due date on a visual calendar timed for precision control of every element of your developing agenda and program. If using a fully completed PERT Diagram, you can know any element's target date and compare the current status, via staff meetings, on any day. You will never gain that sense of control from any packet of loose notes. So:

Make your own PERT Diagram sheet for each planned new meeting. Use an enlarged blow-up of the 1983 “SMTW” enhanced version, or your own version of it. It works!

Trace the skeletal lines-only format and duplicate it—that's your permanent starter sheet—as large as you think useful. If necessary, enter your own terminology for specific needs and dates in ink. Sold? An edited version will reflect your own and specific company functions and methods. Yes, it's additional work, but it's also worth the time and effort if you can have a personalized generic version for all future meetings and other like functions.

Finally, at the time of the commissioned (early 1970s) writing of “AOM,” (publication in mid-1973), its target audience was expected to be corporate meetings managers by that title—of which there proved to be none—as confirmed by our then-United co-worker Jay Lurye's initial experience with self-identified, stuck-with do-ers—meeting-callers’ secretaries. In the 1970-'71 season, Lurye created the world's first meetings-related convention: “World Meeting Planners Conference.” The meetings trade was then simply unorganized. In the next season, a group of purveyors formed the now-largest permanent association, without Lurye but likely using his shared attendance list. No other existed.

In one sense, because the advertisers, not the user-companies, are in control of published, general meetings information and production-focus, the meetings industry is still disorganized. The commercial meetings field/trade needs to be re-organized so as to rehabilitate the message factor. Cavalier, in early 1970s and later: “The message is the message!” Don't you forget it.

You can aid that reorganization process of the field/trade by using “AOM's” forms and guides to create and fulfill valid agendas and programs, independently of methods and 'values' ascribed to the

commercial meetings-industry. Leaning toward the high end of your capability? Learn ISD (US Navy's Instructional Systems Development). Always, buy only what you need to support your given message. Demand what you need; don't merely accept what's being offered. You're the client, even when working with majority-vote purveyor-members of any 'user' association! There are now many versions of ISD, including "simplified" versions that skip essential steps. That can lead to unidentified flaws that can fail later, including in the first delivery of the new program.

In short, "AOM's" original main title created the now-common phrase and trade awareness—because we understand! Its subtitle (after "AOM's" publication was announced and then delayed by its magazine intended-sponsor) became the main title of an earlier book that couldn't provide the 'theory' mentioned in that "AOM" subtitle. 'Theory' seemed to be an over-reach from a me-too approach.

"AOM" understands the issues; you can. Do you? If so, then remember that PERT and ISD and valid meeting agendas and content require *thought* more than *cash* and *pretty* in order to deliver *answers*. Give it all the brain power that you can!

And "Good Meetings to You!"

END

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## Introduction to the Scan Edition

When originally published, in mid-1973, “Achieving Objectives in Meetings” (“AOM”) was a radical departure from all previous meetings books. Those had been discursive and usually described good methods that should be cut-and-pasted into the readers' own methodology, even if inadequate. No system was provided or suggested.

Even books with excellent chapters by multiple known writers lacked a user-system or guide. “AOM” was/is a hyper-system, with specific forms and general guides: It's the world's first how-to for meetings control. Based on proved methodology and accepted educational principles plus research published to its time, it's still valid! Later research has validated the early findings that were/are ignored by the commercial meetings-industry press.

United Attractions, Inc, then a producer of banquet entertainment for major national associations, created the world's-first consulting service for the business stage—by specific request of two returning clients. Programming trust was already established with the clients and enabled unusual departures from presentation styles, according to conventional wisdoms—which are generally more conventional than wise:

Those two major-association clients had asked United to provide a business-stage service because it was not then available except as an adjunct to a dog-and-pony show. United subsequently created the world's first consulting service for the business stage, beginning in 1960. Cavalier was a member of that originating staff.

Other associations and then their corporate members followed the initial two associations as business-stage clients. The fact of prestigious early users helped to validate the new service, known at United as a “program coordinator.” Reason: Associations already had a “program manager.” The two are partners and shouldn't compete for titles. Upshot: The terms can now be used interchangeably.

More associations followed, often promoted by industry focus—which is not a factor in creating meetings that succeed by providing info that's valid, understandable, and usable by participants. Such scattering of interests created a fragmented and unbalanced meetings industry. It was easily dominated by advertising and innocuous, unfounded opinions, surveys of popularity, plus purveyor interest. Years of personal planner experience mean nothing if breadth of experience is limited to one or two jobs.

At United, in the 1960s, meetings were daily work projects, at the desk or in hotels. For Cavalier, it was over six full years of editing, visualizing, and producing keynote business addresses for multiple association and corporate meetings. Six years of committed time is longer than Malcolm Gladwell's “Ten Thousand Hours” that create a “phenom” (often termed 'expert'). Then, personal consulting followed, in related areas. His advice via columns was argued in the freebie mags, usually by the opinions of meeting planners with less experience in time and far narrower experience.

Contrary events: At the NY World's Fair of 1964, Kodak's spectacular overhead screen caused every insecure meeting-caller to seek spectacular meeting components. That was aided by McLuhan's new mantra, “The medium is the message.” Cavalier's published challenge: “The message is the message.” Our mantra: “Message first-- right from the start; Right! From the start.” (c)

National exposure: Cavalier's then-co-worker, Jay Lurye, called the world's first meetings-convention, in Chicago, in the 1970-'71 season (World Meeting Planner's Conference). In the next year, Lurye's list

of self-identified functionaries (there was no other related list, title, or organization) was 'borrowed' by a group of purveyors, who created the first, still-surviving, meeting planner association, entitled MPI. Lurye disappeared. MPI's first CEO had been a client of United, via his previous association. He was committed to message. Key: Professional meetings-management started slowly and differently from its current practice—it started with message-focus!

This writer was a co-creator of the consulting function and co-inventor (via paid-magazine columns) of most current business-stage methods and terminology, developed while a member and co-originator at United. His from-scratch experience, reliance on principles, and proved programming formats inform “AOM” and assure you of the book's dependability.

Cavalier won MPI's Tony Award for his critical (“fish in a barrel”) Tenth Anniversary Convention address, in 1982. Check his acknowledging-clients and read the spoken address at AAD's site; see: <AlliedAgendaDeciders.com>. Click the 'Acceptance' button in T/R corner. Cavalier chaired the world's first conference re: incentive travel, sponsored by NY University (box). Then see the acknowledging-'Client' and 'MPI' boxes. The awarded address is the last item under 'MPI.'

Pyrrhic victory: The address was awarded, but purveyors had taken control of organizational focus in the preceding years. A slight name change in the “late '70s” (same acronym; see Camenson, B; NY: McGraw Hill; '03) helped to 'professionalize' the purveyors via equal-weight votes—a distinct conflict of interest. Focus floated from meetings-content to meetings-production: largely, “buy something.” A fourth industry magazine emphasizes convention production skills, not group communications.

When the web arrived, user-control was already gone. Should advertising-interests drive the meeting industry's reading materials?

Best possible advice: “Caveat emptor!”

So, exactly what's most significant about this old book?

“AOM” was the world's first how-to book that presented a proved system for controlling the creation of a valid agenda and all of its ancillary pieces, which are different each time, despite possible plug-in elements and identical presentation scripts. Controller: Cavalier's own meetings-version of the Navy's PERT Diagram. PERT controlled the development of the Polaris submarine; late 1950s. PERT Diagram for meetings turned agenda-assembly and fulfillment into a visualized calendar for delivery of all elements of the incipient program. Also a world's first.

(Program Evaluation Review Technique (PERT; other terms--including 'performance'--are sometimes substituted within the acronym ) is essentially the reverse-engineering of a concept. It identifies required delivery dates for on-time delivery of each element of the entire business meetings program. If it does submarines, PERT should serve your needs, regardless of your program's complexity. Cavalier's PERT Diagram was first introduced to the industry via his magazine article, in early 1970s. Soon after, a meetings-industry freebie printed a paper-flow chart (more, below).

In addition, “AOM” was the first book/source to mention R-O-I as a consideration when reviewing every potential business meeting. In “AOM,” R-O-I was presented almost incidentally, as a logical calculation at the base of one costing form—because, “Isn't R-O-I standard business practice?” Yes. Except in the meetings industry. There, definitely not then and still not. The commercialized meetings industry seems to buy and sell goods and services for production, without regard to meetings-value.

A major problem for the meetings trade (professional corporate users and university/military researchers, distinct from the commercialized meetings-purveyor industry) is the fact that all three magazines in that industry were, and are, advertising-supported freebies. As Tim Wu and Ken Auletta have both observed in their respective books: In advertising-supported publications, “the advertiser, not the reader, is the customer.”

Already demonstrated via meetings? Until the mid-1980s, there was no world wide web; and, in the meetings industry, a blackout of unwanted information (such as contrary research findings) discouraged their readers' seeing or discussion of any contrary finding. Read the professional journals or forget it! Of course, research is neutral and requires interpretation for business applications. “AOM” interpreted.

In addition, instances of misinformation and disinformation also occurred. Misinformation: If Cavalier was intent on introducing R-O-I, then the industry introduced other 'Return-ons' to suggest that R-O-I was irrelevant. In essence: “Either R-O-A and R-O-E are also relevant—or none of the group is.” Facts: Return-on-Assets and/or Return-on-Equity are accounting calculations for top management and investors—meaningless to meeting planners, who are intentionally being misled into ignoring R-O-I.

Further fact: R-O-I is the only return-on figure that's under the meeting-caller/manager's direct control. The meeting-caller should know the value of the expected return from his meetings/training program; that dollar value can usually be ball-parked. That figure is a key to calculation values and return.

Next, the meeting-manager can collate the likely costs of all elements of the intended program and compare those direct costs to the accepted, ball-parked benefits-value. Reasonably balanced? Somewhat out of balance? What can be subtracted or substituted without losing the wanted advantage?

Seriously out of balance? Adjust the wanted effects or cancel the meeting! To hold a meeting for the purpose of holding a meeting is ludicrous management! Cancel? Cavalier's original advice.

'Cancel' first appeared as “borrowed info” in a Kielty ringbinder that was published before “AOM.” That “AOM” advice had been quoted in the Kielty book, prior to “AOM's” delayed publication, by a hesitant biz-book publisher. Not certain of its copyright claim, that publisher never formally copyrighted that ringbinder book, according to the Copyright Office. Also, when “AOM” was already announced but delayed, another writer “borrowed” its subtitle as his main title . . . . His was also first into print but couldn't fulfill the 'Theory' aspect of the title. His examples were essentially fulfillment-oriented, as a facility's convention manager.

Disinformation example: Cavalier's meetings-PERT Diagram (from its commissioned, but yet published, “AOM”) was printed in Crain's now-closed “A&SP” magazine. Soon, one meetings-freebie printed a paper-flow chart and termed it a PERT Diagram. It was not!

Fact: Paper-flow charts trace the route of any piece of mail from reception by the company mail room until delivered to the addressee. It is valid for only that one company only, except as a possible model for your attempt. Did the magazine editor not understand? Or did an advertiser intentionally misdirect him? Why? Subliminal messages: Lots of nice diagrams around: PERT is no big deal! Neither are submarines?

Key *soto voce* criticism of Cavalier's stated positions: “Cavalier can't prove it!” He couldn't. He didn't need to prove anything personally because his co-invented, fully-proved methodology was based-on



and/or consistent-with proofs published to-date by industry-ignored researchers at universities and by the military's HumRRo. Disinformation, again, by misstatements and omission.

### **Errata:**

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- a) A major gaffe: Terming as 'deceased' a believer-executive at MPI who was described on our inquiry as, “He's dead”—facetiously intending “silenced.” Used--fact unchecked! For shame, Author.
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And “Good Meetings to You!”

Some things extra: The enhanced DJ-I PERT Diagram plus the Dice Game that introduced the then-new professionalism/systems quandry to a NYC exhibition on meetings, in 1972.

END

# Achieving Objectives in Meetings

Theory and Practice  
for Solving Business Meeting Problems

by Richard Cavalier

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We are indebted to the **AMERICAN SOCIETY OF ASSOCIATION EXECUTIVES** for permission to reprint its "Hotel/Association Facility Contract," which sets a standard for the conventions industry.

To the editors of **Sales Management** magazine and **Advertising & Sales Promotion** magazine we want to express our thanks both for permission to reprint articles first published in their pages and for their confidence in giving a voice to ideas which were often contradictory to established practice . . . so you could understand your alternatives and make your choice.

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## INTRODUCTION

Business meetings and conventions have become so complex that the discussion of ideal formulas, the standard "how-to" format, is no longer a valid approach to the real problems encountered in structuring and producing a meaningful meeting or convention.

ACHIEVING OBJECTIVES IN MEETINGS is an innovation in how-to texts in several ways. It doesn't pretend to be all things to all meeting managers, and so we bypass the beginner's primer copy on ash trays, ice cubes, and seating diagrams. Then it presents a rationale for every element of the planning, coordination, and execution of the meeting. Its information units are self-contained and cross-referenced so you can find needed material quickly. And recognizing that textbook problems are not the only ones encountered, it builds an understanding of the fundamental stresses and weaknesses of those elements of the program both inside and outside the direct control of the meeting manager. As a result, you are better prepared to make the right decisions, even under pressure.

In total, ACHIEVING OBJECTIVES IN MEETINGS is a problem-solving kit . . . a distillation of the author's sixteen years of learning in every facet of non-personal and interpersonal communications, including corporate sales promotion and training; advertising and public relations; employee publications; and syllabus development (with and without lectern scripts) for identifying and correcting people-problems. The author is also knowledgeable about stage craft and visual media. His foreign travel articles have appeared nationally.

As a co-originator – in 1960 – of convention coordination as a consulting function, he has implemented his theories and methods in the meetings and conventions of many blue chip corporations and major national associations. Many of the new departures of the early 1960's have become standard business meeting practice.

Having been both buyer and seller in each of the prime meeting and convention functions, he enjoys a perspective based on total exposure. Scattered throughout the book are reprints of some of his pertinent magazine articles, which initiated consumerism in the meetings industry. Each article is dated to demonstrate the long-term validity of the ideas expressed, such as:

# **PART ONE**

In Theory



## OVERVIEW

Meetings are a communications tool. That's hardly a surprising statement — what is surprising is that the statement need be made.

For an indefensible number of years, meetings have seemed to be about meetings — that is, about the fact and count of, the bodies present, the hotel decor, the dog-and-pony shows, the food-service, and yes, the applause. Unless redirected, meetings and conventions are ripe for ripoffs by sharp suppliers. The honest suppliers received no thanks and little recognition in the past because the industry didn't understand.

Things are changing. Because of a new emphasis on fundamental communications (which happens between and among people) and its prime technique, adult education, attention has swung from the package to its contents . . . where the attention has always belonged. The swing is shaking up a lethargic, unprofessional convention supply industry.

Focusing attention on the package was easy: everyone follows similar procedures to get similar results: perfectly-placed ash trays, abundant ice cubes, bright slides, and generous compliments on a fun meeting. A lot of people have made a lot of money on packaging.

Focusing attention on meeting content, by contrast, is difficult because no two meetings (even of the same group in the same location) have as many similarities as differences. In short, meeting content is complex and requires hard work to understand and control.

That complexity has a logical cause. Though people can remain constant by name and count, they become inconstant to the point of instability when confronted with factors of change which affect them, especially if those factors are unwelcome or apparently unnecessary in their view. Their view, not yours, is cogent.

Therefore, although on the surface a meeting is a collage of many subjective elements, it is in actuality a composite of a vast array of neutral components, all of which call for objective decisions from the meeting manager. He does not enjoy absolute freedom of choice. Although others can assist with details, only one man can make consistent decisions, because he can at least attempt to

## THE INDUSTRY PRESS

If your meetings' budget is somewhat smaller than the national debt, how do you reconcile your need to pinch pennies with ubiquitous tales of multi-media extravaganzas which fill the trade press and the suppliers' exhibits at convention industry trade shows?

Marketing executives who don't have at least a half dozen years' experience in the production side of the meetings they call probably can't reconcile the two. Only with the emergence of the professional, permanent training manager has any one company achieved for itself a valid viewpoint on its suppliers. Unlike his predecessors who were just passing through, the professional training manager can acquire real and comparative information — that's his job. And he has been able to pick and choose suppliers for the way in which they could serve his ends. Their numbers are growing, but there are still relatively few who know what the neophytes need to be told: staged extravaganzas are a minor factor in company meetings. Show-biz in meetings is an idea whose time has gone.

In February, 1972, SALES MANAGEMENT magazine quoted numerous company trainers and meeting supervisors as saying produced stage-shows and multi-media spectacles were a minor consideration in their meetings. Although the SM thesis was contrary to previously published stories, it is adequately supported by numbers:

Fewer than 100 produced meetings are reported on each year out of a total exceeding 400,000 off-premises meetings being held by industry alone. Additionally there are more than 40,000 associations which, by law, must meet at least once each year. These do not count the innumerable informal conferences held daily.

Therefore, a guess of a half-million industry and association meetings held annually could be conservative. About one hundred are reported — one in five thousand meetings! Just how *ubiquitous* is that?

Further, some of the reported meetings are a one-time-only event by that company in recognition of a special situation and might never occur again. Separate habit from incidence, and the one-sided coverage

above all other interests. After all, our McLuhan-debunking piece was printed by an outside publication a year after the industry press had refused it. But the consumer has made his point, and intense competition should now give the reader a fair shake.

If you still read convention industry publications, you can do a couple of things. You can write the editor of your preferred magazine and tell him your gripes and which kinds of help you need. Or you can simply use your own common sense as a guide to the degree of production required by your message and audience, whatever the stories. Given your message, your people, your budget, and your responsibility for measurable success, it's your decision. And that's what management is all about!

## PRODUCERS AND OTHER SUPPLIERS

Chief beneficiary of the press emphasis on format rather than content of meetings is the industry supplier, especially the theatrical producer of live shows or featured film sequences. Almost indispensable to the spectacular, the producer has seemed a fixture on the company meeting planning committee, whereas he is simply another supplier who should be called in when plans are already reasonably firm. The producer doesn't like it that way and plumps for consultant status; that is, early entry and access to budget information. Whether a producer deserves consultant status is another matter (see Part Two, Sections I & VII).

Because the windfall profit lay in theatre, relatively few of those who understand meeting construction have become consultants. But there's a new breed of media expert available these days. He thinks like the training manager, is familiar with all media which could be bent to the task, and has the contacts (but not the staff, overhead, and resulting bias) to do a creditable job as *advisor* and purchasing agent for the meeting manager. He can be paid a flat fee in place of profit or commissions (which makes him a consultant); or he can be given all of a specific budget or commission on purchases (either of which makes him a supplier-advisor). Freedom from profit-motivated bias – not fee structure *per se* – is the badge of the consultant; all others are suppliers.

However treated, the fact of production creates a new set of responsibilities and problems. Many old-time producers know, understand, and love theatre. They're good at it, too. The hitch is that few theatre people understand industry and the corporate viewpoint. Since his staff tends to share his show-biz outlook, staff writers and directors often require innumerable rewrites and

## FACILITIES

In November, 1972, when a group of international travel industry executives convened at a major chain hotel in New York, meeting room and luncheon setups were mauled in a display of substandard service which has become our convention industry standard. Shocked European hotel operators asked a panel whether such service were acceptable to U. S. meeting managers. A U. S. convention industry magazine editor said it was. From the floor we contradicted, stating that the service was unacceptable, that meeting managers had no alternative, and that Europe could offer an alternative if it would sell service. A long silence followed.

When format is the major consideration in reporting a meeting, the reputation and decor of the hotel are extremely important as an element of the big show – the hotel need only make itself available to fulfill the format obligation. Many facilities have continued to perform to only that minimum level, however much they have promised.

But when the emphasis is on program content – as it must be for the company or association involved – the most significant contribution the hotel can make is performance to contract with you. Willingness to serve is the vital element. Once a facility passes the basic quality level you set, the attitude of management and staff transcends all other considerations. Management must encourage its staff to serve well, of course, but some managements refuse to permit staff to serve as contracted because the competent service for which the client has contracted costs more than management is willing to pay. *Caveat emptor* is the motto of the facilities industry.

Harried by more than two years of outcry against abuses, the industry has begun to modify its stance, if not its performance. Two events have occurred which will have far-reaching effects.

In midyear 1972, a standard contract was developed as the "Hotel/Association Facility Contract" by The American Society of Association Executives in cooperation with the hotel industry. Although the contract does not provide for penalties for non-performance of service on the part of the hotel, it is nevertheless a signal victory because for the entire decade preceding, the facilities as a group had termed a standard contract undesirable. The A.S.A.E. standard contract is reprinted by permission in Part Two, Section V.

In December, 1972, the board of directors of the American Hotel and Motel Association adopted a code of operating procedures which it is recommending to local association affiliates and members. Announced as a response to consumerism, the code contains a number of provisions which will make life for meeting managers

bull-session and the over-produced extravaganza – and running away with results. Second, sophisticated employers are competing with the slouches to win the service if not the loyalty of the phenomenally aware youth of today; they use human relations with education, and it's filtering into just about every level of employment.

For a time, humanism in industrial relations was labeled a fringe benefit, but it's already being viewed as a necessity for tomorrow because a more inner-directed population is opting for a voice in its own destiny.

Human relations programs already in effect have produced results exceeding those of the sweatshop. Evidently people are cooperative and dependable when given a fair shake. That some managements are surprised – or even unaware – says little for their capability. In our opinion, there are relatively more poor managements than poor employees. The next great leap in profitability will come when business demands professionalism of its managers, when dog-eat-dog politics is replaced by healthy competition, when employees are permitted to achieve beyond the skill level of the insecure supervisor.

The personnel problems of a company cannot be solved by the meeting manager alone; yet by conscientious and judicious application of people-methods in meetings, he can help acclimate the company to the potential of its prime asset – the intelligent employee.

Even the most technically-perfect meeting will fail its purpose if it has nothing to say to its audience/participants. People are what meetings are about. You cannot affect people unless you can communicate with them; you cannot affect them even with substantial innovations and compensations unless you can first communicate honestly with them on an adult level; you cannot affect their basic motivations without first affecting their values – their ways of thinking and living.

You must understand people in order to program successful meetings. Some meeting managers have an accurate gut reaction to the people they work among; others are less involved personally but are well-versed in the psychological and behavioral theory governing adult education and motivation. Both methods seem to work, although only the latter types can articulate the reasons. As a compensating factor, the gut-workers sometimes can call the shots on sensitive issues far better than the theorists simply because people outwardly conform despite inner reservations – witness the reversal of stated opinion on abortion since newspaper articles made it an acceptable topic of daily conversation. Should gut reaction or theory prevail?

A logical conclusion is that each group should have a fair competency in the methods of the other. One gets to know people by

that for more than a dozen years, industry has applied only selected theories and sometimes irresponsible interpretations of the basic research which codifies behavior.

A pioneer, A. H. Maslow, established five categories of basic human needs on an ascending scale. Lowest and most fundamental are physiological needs (food, shelter, sex); then safety (the security of those needs); belonging and love; esteem (self-respect and prestige); and self-actualization. "What a man can be, he must be," Mr. Maslow asserts. Today's young say, "Do your own thing."

Mr. Maslow demonstrated that if basic security is threatened, the employee reduces his job effort and seeks satisfaction in other directions. His recent research demonstrates that the three higher levels are inverted at will by individuals according to their own values and that the healthy growth of personality creates self-actualizing tendencies which can be realized either in occasional episodes (with the duration of years or projects) or in total dedication to a cause or an art.

Dr. Frederick Herzberg identified 10 motivation-hygiene (maintenance or dissatisfying) job factors. Predominantly satisfying (in descending order of frequency) are achievement; recognition; the work itself; responsibility; and advancement. Always heavily dissatisfying were the control quintet: company policy and its administration; the quality of technical supervision; salary; interpersonal relations, especially with supervisors; and working conditions.

Dr. Herzberg validates the word "type" when applied to various job fields. Certain characteristics are common to employees with like jobs, although whether in chicken-or-egg relationship was not specified. Yet the meeting manager must approach accountants differently from salesmen differently from line workers.

And while people are doing their own thing, they are finding their own interests in their jobs. The company can encourage or stifle that interest — most often the latter, unfortunately.

More recently, Dr. Melmet Beqiraj has related the unrest of the socialistic and communistic systems to the turmoil of other peasant societies throughout history — including our own. His "peasant" is a social type who lacks the comprehension of environment needed to control his own destiny. Peasant societies are coercive and repress internal dissent; lacking true satisfiers to distribute as rewards for labor, the peasant society dispenses status and substitutive satisfiers, such as fiestas, which offer temporary relief from stress but no solution to basic problems. With cars and television seen as substitutive satisfiers, the Western world and especially the U. S. are societies of "technologized peasants," and future stability will depend on provision of true satisfiers for self-realization.

The ramifications of these theories are stunning, and their

opportunists have a field day, prolonging and compounding uncertainty for their purposes. The conventions industry has endured its day for nearly a decade. Human relations programs, similarly, are blighted by sensitivity training, also known as "T" groups, encounter groups, or confrontation exercises. By whatever name, they are a hasty and harmful response to the need of people to know people. Whether programmed by licensed professionals or by self-styled experts, sensitivity training is quack medicine. It deserves oblivion as much as its perpetrators deserve retribution.

In its simplest sense, industrial sensitivity training is a group exercise calculated to bring men face-to-face with themselves, whatever the risks to their mental well-being, for the real or imaginary benefits any added self-knowledge can offer the company. Encounter groups are long on promise and short on performance and intrinsic value. None has been proved to offer a predictable and consistent, measurable benefit. Yet their faults are legion.

Professional psychologists argue that the incidence of psychosis produced or uncovered by sensitivity groups is "only" one-half of one percent; however professionally-designed programs are in the minority. Slick package merchants neither recognize nor report the breakdown of a human psyche. So the rate of destruction of human beings proceeds at a rate of up to ten percent, according to studies conducted and observed at Stanford University.

In advancing the "right" of business to destroy a man sooner in a laboratory exercise rather than later in an actual (hypothetically projected) job crisis, industry exhibits a moral poverty not paralleled since the early years of unions, when some now-respected business organizations shot striking workers who "threatened to occupy" facilities.

Because encounter group problems and confrontations are artificial, the company loses the non-complicity it would have were the exercise a true job-related crisis. A man can escape from a psyche-cracking problem by resignation, if no other way. The employee is further victimized by the program because it cheats him of the supportive mechanisms around him — family, friends, business associates, from whom he might have sought assistance.

By professional standards, the encounter program is indefensible in even its basic structure — quick start/stop in an environmental vacuum. In psychiatric theory, psychoanalysts not only interview the patient over a long period to build trust and understanding, but also counsel the family and others who have a contact with and bearing on the mental stability of the patient. Encounter group patients — even if they should reach new awareness — usually return to the identical environment they left. That new awareness can cause new problems among co-workers,

Generally, psyche-damaging crises are the result of poor general management or faulty individual decisions come home to roost. In crises of *causal* relationships, mental strain develops in the individuals who cannot escape blame or in the scapegoats for those who can pass the buck. Crises caused by natural or uncontrollable events do not produce traumatic reactions. Exhaustion, maybe; guilt, no.

Treatment of the frictional symptoms through encounter groups is too little, too late . . . an exploitation that makes the innocent and submissive at the bottom pay for the mistakes made at the top.

There is no valid objective of business which is not more adequately and more humanely served by small group methods – especially the Leaderless Group Discussion, which separates the men from the boys under the shock-absorbing ego-buffer of task orientation. After a series of low-cost LGD tasks have been accomplished over a period of time, both the man and his company will have a fair and valid reading of his natural pecking order among his co-workers, based on demonstrated strengths and weaknesses. That's really what the hocus-pocus of encounter group training is doing so badly at such high cost in dollars and mental health.

The inescapable conclusion is that sensitivity training occurs in inverse ratio to the quality of company management. Now take a second look at its promoters. Had any surprising new insights lately?

The interrelationships of the concepts we've developed in Part One are as complex as the concepts themselves. All must be integrated into not only the basic human relations program but also into the meeting which invariably will herald it.

As an analogy, the world's melodic heritage is too vast ever to be catalogued; yet every known theme can be reproduced on the piano using only twelve tones and several variations of the twelve in different combinations. The twelve tones are the common denominator – they are not the music. Music is the result of programming original theme ideas for instrumental media using those twelve tones in stipulated musicology formats – staff, clef, key, note, and tempo. And the same twelve tones, whether expressing be-bop or Beethoven!

You can't catalogue people, either. But some of the prime tones of human motivation have been identified by Maslow, Herzberg, Beqiraj and others, including the Menninger Clinic and Michigan State University; themes and ideas must be communicated via adult education formats established by Hovland, Lunsdaine, Sheffield, Knowles, Sherif, Cohen, and others . . . but the resulting message-music is entirely your doing – pops, flops, or classics.

You waste time and money and build audience resistance if you try to motivate with maxi-media blitzes and dog-and-pony shows. Those might entertain, but if you have nothing to say, show business won't



course re-charted before the opener is delivered, or is it altered bit by bit as the presentation proceeds? And how is it maneuvered in the typical eight-minute time grant of an initial call? There's a problem for the behavioral scientists.

We suspect that the banter is cover for the gutsy non-verbal communication which is taking place. Non-verbal communication is effective. It is potent and accurate. Over-thirties say, "I think he's trying to tell me something," and the young call it "vibes." Good or bad, vibes and NVC are there, real, and fast.

British studies have demonstrated that within moments of private confrontation, any two persons will agree on the assignment of the dominant/submissive roles, often by instant recognition, and with a phenomenal accuracy as measured by other D/S rating methods already validated.

In American studies of leaderless small groups, the self-proclaimed leader is often successfully challenged, the vanquished concedes, and the group ratifies. All without verbal support of the contest as such.

Non-verbal communication has never disappeared; but as a non-quantified concept in a scientific age, it was discussed in lower tones than was a proposition within earshot of Victoria.

NVC is respectable again. Rehabilitation began with recognition that people declare themselves with signs, symbols, possessions, gestures, postures, facial expression – and touch – more consistently and more accurately than with words.

The adage that the janitor and board chairman are indistinguishable in the sauna provides the value link between custom-cut clothing and the funky garb of today's young.

With perfect 20/20 hindsight we can understand that crowns, uniforms, and ceremonies were developed to bolster the NVC-quotient of men whose personal stature fell short of their appointed rank. Spectacle could dominate from a (safe!) distance: Hail to the Chief, and all that.

What does it mean in the meeting room? Any number of things. First, what you and other speakers say will be augmented with the participants' own conscious or unconscious evaluations of the speakers and the surround. There's not much point in trying to fake it. Next, the standard syllabus of sales skills and cognitive training sessions must make a place for the people-reading skills. Then, salesmen must be coached in reading, and in adapting themselves and their presentations to, the psychic needs of the men who might not buy. Last, the company must evaluate the signals it sends to its employees via managers and to customers via typical field attitudes.

Everyone knows the archetypal dynamite salesman. He's the one who climbs to top managerial positions. But we've been amazed at the

rationale for their inclusion here and in your personal library.

In the mid-fifties, we gained our first exposure to company meetings as sales development staff; by 1960 that evolved into production-consulting on conventions of national associations. We learned that a perfectly-produced meeting could say nothing of value to participants. To improve meetings, one had to improve content; and so we concentrated for a number of years on identifying and bolstering the message in all forms of communications. That integrated view is the basis of this book.

In the behavioral sciences, we have found not only vocabulary and validations for the observed quirks and foibles of people as individuals and groups in meetings, but also fascinating concepts which we might never have observed . . . yet which must ultimately be accommodated in organization policy and in meeting rooms. You can take the route of practical discovery over many years, or you can make a foray into the now-classic texts of the behavioral scientists. With the latter, you'll save time of course; but more important, the insights you gain from the various postulations will enable you to realize even richer results from the pragmatic methods established in Part Two.

Through logical progress you'll move to the point of witnessing changes not only in organization communications but even in the attitudes and values, and so the lives, of the people you work among.

That measurable return on your personal investment of concern and effort justifies responsibilities and provides much of the reward.

Whatever your title or position, you are the meeting manager for our purposes of discussion. People are the stuff of your meetings, and education is where it's at for tomorrow's meetings. You should be holding them today.

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# **PART TWO**

In Practice



# The Message and Meanings

## PERSPECTIVE ON SELF AND COMPANY

### I-A

As a meeting manager, your position in the company hierarchy is not as important in itself as is your understanding of a) your own real strengths and weaknesses in constructing meetings; b) company personnel; c) company policy and precedents in meetings and training programs; and d) company politics.

Throughout this book, we address the meeting manager as one who controls each of the three key elements of the meeting: its message and authorities, its participants/audience, and its support materials and media.

Such a person might not exist. Few individuals are required (or permitted) to perform all those functions without counsel . . . yet the person ultimately responsible for the results of the meeting must be sure that every element which bears on meeting content is adequately provided for. Someone, then, either from his own background or from counsel taken from various sources, must provide the expertise required to make every decision valid, authoritative, and intelligent.

This does not mean that a committee can or should make the decisions. It does mean that no subjective judgments should be made by the meeting manager until he has an accurate appraisal of all pertinent information. For a first meeting or a new man, that seems complex, but much of the personal preparation becomes routine after a meeting or two. The message and the audience reaction to it become the only significant variables.

So the first step is exactly to assess your own experience and aptitudes for the assigned task – meeting management. How much of the general theory is new to you? Familiar? Previously tested? How open are you to new ideas? How tied to the old? Are you hung up on tradition? In awe of new gadgets? Which techniques do you use well? And, more important, do you know what it is you don't know about meetings? Although this book can't provide all the answers, it certainly does aim to raise the indispensable questions to which you must develop suitable answers.

When you have gained a fair understanding of your own readiness

of meeting manager. Most likely, you don't. Yet someone will bear the ultimate responsibility for the audience's success or failure in acting on the message: find that man! Level with him on all matters, especially your stand on policies affecting your construction of the meeting. If he has been on the winning team for most of the internal battles, he will probably make a new effort to get you an exception from policy, if not a change. If he is among the losers in the current power lineup, now is the time to find out. Then go to the source of power and play your hand. Far better to know where you stand before you make commitments, while changes are easy and time is on your side.

When you have all those elements in balance (which is not necessarily synonymous with *under control*), you can make the decision on format. Companies can communicate with various of their audiences via numerous formats, including letters and house organs; advertising, promotion, and public relations campaigns; exhibits and displays; videotape or self-help training packages; and by telephone or face-to-face conversations. Via meetings, too.

Each of these techniques has its own advantages and short-comings, based on message and intended audience. Your analysis of the suitability of the meeting format is an integral part of its confirmation as the proper format for the given message and given audience. If a meeting is called, and if a meeting is the wrong format, cancel it!

Whether you choose the meeting format or another — or a combination — is immaterial in regard to this book because the adult education principles and the meeting standards and ethical procedures related here have equal application to all communication formats. Understanding is the denominator; value analysis, its tool.

If you conscientiously think through the *intent* of each form provided in the balance of this book . . . and if you bring valid company perspective to the task, either by personal knowledge or expert counsel . . . you cannot fail to construct a superior vehicle for communications: the meeting which succeeds in achieving its stated objectives.

Communication: talking is only part of it; you must also listen, react, and let the audience/participants interact with the message, its authorities, and each other. To produce legitimate, desirable change. When a meeting succeeds, the audience will never again be precisely the same. And that is both the challenge and the fascination of meetings management.

## DETERMINING MEANING

### I-B

One of the old saws of personnel interviewing is to ask an applicant

To keep the issue profitably out of focus, there has been much talk about "creativity" and "prestige programs." But the advertising industry, itself the bastion of industrial creativity, has already acknowledged that what is artistically creative is not necessarily productive of sales – *communicative*. Prestige now lies in successful communication with the buyer. The end of an era.

In psychology, the highest form of creativity is problem-solving. A meeting manager's real job is problem-solving in specific message (problem) areas within specific time and dollar limits. Accomplishing company goals within the meeting format despite those restrictions challenges his creativity.

In interpersonal and group communications, the Alpha-Omega is Achieving Objectives. That's the beginning and the end of every meeting manager's responsibility.

And the guarantee of his success.

## A New SM Department

# Meetings Management

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By RICHARD CAVALIER/Contributing Editor

## Selling Your Message Like a Product

There's no such thing as a captive meeting audience. You can lock people in a room, but you can't make them want to understand. The trick is to involve the individual; to talk about things that affect him in terms he can comprehend and act on.

In a very real sense, the management message of a meeting is a product offered for sale via the meetings medium to people who might or might not consider themselves prospects. If the meeting participants alone must act on the message, it's a direct sales effort. If they must relay the message so their customer reacts, it's indirect. In either case, your job is much the same.

An employee in the meeting room is no more captive than a housewife watching TV in her own kitchen. You can't sell ideas to your men in a way that they couldn't sell to strangers.

Even marketing men who work closely with advertising occasionally forget that effective advertising is designed to fulfill five of six levels of communication with the prospect. The Advertising Research Foundation defines these levels as:

1. **Vehicle distribution**—circulation of the message via a broadcast or print format.

2. **Vehicle exposure**—TV set on or print piece thumbed by an audience.

3. **Advertising exposure**—ad heard or seen within the attention range of an audience.

4. **Advertising perception**—conscious awareness of the message by the prospects among the audience.

5. **Advertising communication**—the persuasive sense of the message

transmitted selectively to better prospects.

6. **Sales response**—the final effect of persuasion on the prospect.

The first three levels deal with the medium's capacity to put a message physically in front of a group of people. This is analagous to planning a meeting, calling people in, and talking at them. Poor meetings and ads generally stop about there.

The second three levels require an interaction with the prospects—causing them to identify themselves, be persuaded, and act. But, whereas advertising commits its media to only the first five, meetings permit the sales response to be measured directly, both on paper and in field sales results. All six levels measurably fulfilled! (Point-of-purchase enthusiasts claim all six, too).

### No Con-Jobs, Please

When asking the meeting audience to identify with and become the typical prospect for the message-product, it is necessary to talk only common sense, ask reasonable effort, and outline the rewards. Until the company turns them off, most people care about their jobs, so threats and con-jobs are out of place; so are poorly conceived multi-media displays and stage extravaganzas used as persuaders.

By treating each message as a product being advertised to your meeting participants, you can guarantee yourself a message that is technically complete for the meeting format. Completeness won't automatically upgrade an unpopular message, of course. But thinking the meeting

through forces you to make the kinds of allowances for each salesman's interest that will ensure that the message-product is salable. Step by step, you should consider who is a prospect and why; the average salesman's attitude and how it may have changed; and how to measure the "sale" of the message afterward.

If you were in their place getting the same message, what would you think? What can you do to heighten (or change) that reaction? Then, will it sell? If you're not sure, readjust the message, demands, and rewards until you are.

If you've gauged the acceptability and completeness of the message in advance and it still doesn't go over, it's probably because you don't know your own men. Even in this unfortunate situation, however, the meeting can be helpful. The tip-off will be in the feed-back you get from your listeners. If management previously has not encouraged back-talk, it certainly must be invited now.

Provided you're honest with yourself about the features, advantages, and benefits of your message-product, you'll know in advance whether your men buy. And that will set you up for a string of the most productive meetings you've ever called. ■

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June 12, 1972



**HOW**

# **MEETINGS**

**HELP SALES**

## **Jargon Is a Dirty Word**

By RICHARD CAVALIER/Contributing Editor

**W**hen your sales meeting turns to a discussion of customer prospects and problems, the talk should be in the customer's language, even though he may be 300 miles away. Why? Because the difference between language spoken within a company and in the field will not only affect the speed of a sale but can actually make or break it.

Top management that tries to save a few hours in planning a sales meeting by using company jargon may find this an expensive investment. Relying on in-house terminology to do the job at a sales meeting forces every participant to translate jargon into the language of his customers on his own. This leads to errors.

If a sales message is ultimately intended for the ear of the customer, why shouldn't it be stated in the customer's language at the original meeting? Then the supporting visuals, workshop sequences, and sales aids can use identical terminology, resulting in a uniform sales message throughout the country. For verbatim delivery, use tape, film, or print pieces and build sales kits around them.

### **Words That Move Mountains**

These points are valid whether you are talking to staff salesmen or to dealers and distributors. All sales agents must practice in workshop with the same materials that customers eventually will see and hear.

Terminology alone will not guarantee favorable customer response, of course. Yet, when the customer's language replaces jargon at sales meetings, management can evaluate

the sales message more dispassionately. Sometimes the message will be modified when translated into customer language, simply because it is not convincing without the gee-whiz aura of jargon. Occasionally, an entire sales strategy will be revised, as the following example shows.

A major manufacturer of two-way radio equipment found itself enmeshed in highly technical sales jargon (diodes, impedences, etc.) that intimidated new salesmen, irritated customers, and made prospects apprehensive. So the sales training director translated the technical incantations into service terms: range of reception and freedom from static and interference. Then he brought in several groups of newly hired salesmen, taught them the key service that the product could perform for the customer (instant contact with employees afield) and showed them how the radios worked. As a result, the new men sold sooner, sold larger orders, and out-produced co-workers many months their senior on the job. Customer language was spoken at the next national sales meeting.

### **Improving the Odds**

When a salesman leaves a meeting convinced that he has something of value for a customer, knows how to explain it, and that he will be proved right by product test, his chances of selling the product skyrocket. That's why management should do everything it can to help him tell his story in the right way. **SM**

September 18, 1972

## MEASURING SUCCESS

### I-C

One of the surprising factors in the attitude of American business toward company communications is its unprofessional approach in measuring success. While brand image changes are not readily measurable in quantitative terms, individual advertising and sales promotion campaign objectives and results are. Yet, the results still are not routinely measured. Most advertisers try to slide by on approximations and guesses and overall trends.

Ditto for the meeting room. People are herded together in the hope that lightning will strike and everyone will leave supercharged with information and enthusiasm. But the meeting has cost dollars – in terms of the staff time expended, if nothing else – and no one has questioned how that time cost will repay itself.

In determining whether to make a capital goods expenditure, management asks the dollar cost of the machine tool or building, the probable effect of depreciation and appreciation on long-term profitability, the cost of maintenance, and the availability and cost of rental equipment or space, if there's an alternative. Then the entire cash/mortgage decision is subject to scrutiny in terms of a reversible theory known as "future value of current dollars/current value of future dollars." And the whole analysis is weighted by all the variables of the market, projected under both favorable and unfavorable conditions. That's SOP for comptrollers.

It's surprising that those same investment concepts are not regularly applied to meetings and conventions, although the need exists and the ready translation of those concepts into the working language of meetings is apparent.

Communication problems affect company personnel even more directly than the general public. Whereas the public buys both actual product or service and also perceived (image) advantages – allowing compensation for error – the employee sees his company in the deglamorized "marriage" situation. But whereas most companies survive and even prosper with just a few percentage points of the total market, management can get nowhere with just a few percentage points of interest or understanding among its employees.

Favorable or unfavorable, response is the only real gauge of communications. Response is measurable. Attitudes can be measured by a competent psychologist before and after any program, and he can give a good reading on how far the audience has been moved.

Obviously, sales are measurable – although that dollar measure is sometimes the only measure applied to field personnel, who can suffer the same attitude problems as their inside associates.

# HOW

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# MEETINGS

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## HELP SALES

## You've Got a Hit on Your Hands (or Have You?)

By RICHARD CAVALIER/Contributing Editor

If you think no one in the company is concerned with measuring the success of your sales meetings, you're wrong. The thousands of dollars spent on these activities are being watched closely both by top management and by the controller's office. The question is, when the accountant enters the cost of a meeting does he debit "Sales Expense" or "Good Times"?

As a matter of form, every meeting must be hailed internally—and some in the press—as a resounding success. But few people seem to know what the term really means. If pressed, meeting managers usually mention audience response, which to them means enthusiasm, applause, or cheers.

Measuring effectiveness by applause is an old show business standard, and it's been oversold to business. Except as it might indicate morale, applause has no meaning other than that the boys enjoyed the show. It is worthless in gauging learning or understanding, which are the prime objectives of a meeting. The show that ends with cheering and tumult in the aisles could be a flop in delivering the message. Unless you evaluate other things, no one really knows.

When measuring, business has one criterion: productivity. What dollar profit or other tangible will be returned for the dollars and man-hours spent on the meeting? Only with a return can the expense be viewed as an investment.

So, for starters, success can be defined as a statement of a goal achieved. If no measure is made, no claim of achievement is valid. If no goal is set, no success is possible.

Given sensible parameters, success is easily controlled and remarkably predictable. This can be done by taking five simple steps:

1. **Set short-term goals** with an eye toward achieving long-term objectives. Example: to teach salesmen the new sales technique this week; to increase sales 10% over last quarter within six months; to gain an additional 3% of the market within one year.

2. **Establish measurements** for these goals. Plan exams, role-playing, and contests for learning; chart dollar comparisons for net sales; codify complex market analyses for market share.

3. **Select a format.** Is the meeting to be central or regional; taught by a trainer, the sales manager, or by the salesmen themselves; will it be information-delivering only or information-seeking as well; will it take hours or days?


4. **Develop specific program elements.** It will take tests, workshops, sales quotas, and market surveys to implement your plans.

5. **After the meeting, follow up** on the measurements established for each goal as it is achieved. Do something about the results. Write a report to the salesmen responsible.

Occasionally, a program element does not produce the anticipated results. The fault could lie in any of the prime elements: overly ambitious goals, superficial measurements, or skewed market analyses. If a near miss occurs, don't bury it, dissect it. Was there a goof in judgment of internal and controllable factors, or were insufficient allowances made for external and uncontrollable factors?

Hard-headed analysis of every disappointing facet will help you develop rules that will permit you to conduct the near-perfect meeting every time—by quantified criteria.

A meeting has succeeded when a manager can say something like: "A full 87% of the men mastered 90% or more of the workshop material and are selling at or above quota; 11% of the men made marginally acceptable workshop responses and are being retrained and coached; 2% of the men were found to be unsuitable and were transferred or terminated."

With those results, it really doesn't matter who whistled and shouted. The audience is performing! 

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June 26, 1972

**"Achieving Objectives In Meetings"**  
**MESSAGE PROFILE**

(Use a separate form for each message)

**1. Key concept of message:**

Who is the authority for this message?

**2. Ramifications: effects on present policies and methods:**

Conflicts:

Changes needed:

**3. Changes required in materials and tools as a result of Items (1) and (2) above:**

Tool:

Change:

**4. Who is responsible for implementing those changes?**

At corporate level:

On staff level:

On the line:

In the field:

Other:

**5. What are the best techniques for implementing those changes (consider new tools and training structures, Sections III and II, respectively):**

**6. Is a meeting required? [Yes] [No]. Why?**

**7. If required, can meetings be conducted in various locals, given proper construction? [Yes] [No]. Reasons:**

**8. Does the rationale of Item (7) agree with the combined restrictives of Items (3), (4) and (5)? [Yes] [No]. Discrepancies:**

"Achieving Objectives In Meetings"  
**AUDIENCE PROFILE**

(Use a separate form for each message if effects differ)

Re: Message

1. How is the audience affected by the message?

Corporate:

Staff:

Line:

Field:

Other:

2. Is the immediate reaction of those affected likely to be one of [enthusiasm], [passive acceptance] [objection]? Why?

3. Does that reaction argue [for] [against] the meeting format?  
Why?

4. After the message is stated, and objectives and methods are outlined, the training/education function is essentially:

- (a) The *improvement/reinforcement* of existing skills or methods;
- (b) *Slight modification* of existing skills or methods;
- (c) *Substantial change* to previously used skills or methods;
- (d) *New* complementary skills or methods to be learned.

Describe each applicable function:

5. Is the training/education function compatible both with the applicable functions of Item (4) above and with the tools previously selected (on the "Message Profile") as best for the message? [Yes] [No]. Discrepancies:

6. Resolution of discrepancies or confirmation of compatibility:

7. Will the proposed new methods/skills/tools return a measurable dollar benefit (see "Balance Sheet," this section)? [Yes] [No]. Probable return on investment: \_\_\_\_\_%

## TECHNICAL FAILURE OF THE PROGRAM

### I-D

Whenever a technical failure is mentioned in criticism of the structure and/or production of a meeting, the producer always disclaims responsibility by saying (correctly) that he cannot guarantee that a projection bulb will not burn out. But a burnt out bulb (and such like) are merely *mechanical* failures – and not *technical* failures.

A technical failure is one in which the message fails to break through the theatrical trappings or is totally lost because of a mechanical failure. A meeting which does not have a workable “Plan B” in case of simple mechanical failures is a producer’s error. So is the maxi-media show which everyone applauds without ever understanding the purpose.

Early in 1970, one of the nation’s Fortune 500 corporations spent about \$100,000 on a production for a business meeting in which the visual effects were controlled (foolproof!) by punched cards. But the mechanism flipped two cards at the very start and threw itself out of synchronization. The corporation chairman ordered the machines shut off, and he delivered the message voice-alone. The corporation survived, as did the products, but the ramifications both legal and moral of a producer’s responsibility before his client will be around for some time.

Creating a “Plan B” for a meeting takes only a small extra effort, but recognizing that the production scheme is smothering the message is another thing. Message sensitivity requires a firm resistance to the supersalesmanship of producers. They sell, after all, their production devices and services – the message rides free, plucked from your files at low cost. Unless producers sell you consulting time and unbiased advice they must sell you things. The big profit is in *things*.

With alarming predictability, the recommendations of the producers as a group have reflected the kinds of things they are best prepared to do. That is, for a lengthy program, the film studio produces few live performances, and the stagecraft people usually work with actors, short film sequences, or slides. Neither eschews performances for do-it-yourself training which can be mailed and completed without a meeting.

While on the surface it might seem that the clients have preselected carefully, it is more often true that the client has no idea which of many program formats is best for communicating his message because most often he does not know what his message is at the time he begins shopping for a producer. Although he doesn’t need it, he is usually trying to gain lead time on a meeting he thinks will occur soon. When advance shopping leads to premature commitments – as it usually does – it is dangerous.

## DEVELOP PRESENTATION TO SERVE MEETING CONTENT AND AUDIENCE

by Richard Cavalier

Not uncommon but always unsung are the heroics used to mask the technical production failure of a major business meeting. The specter of just such a technical failure haunts anyone who has responsibility for business meetings. However, the medium can fail but the product may survive on its merits.

At stake in industrial communications is an ivory tower pronouncement that "The medium is the message." It's difficult to imagine what kinds of studies – if deep enough to be meaningful – could have been so uniform and conclusive as to permit Marshall McLuhan to declare another scientific law.

To the contrary, research has increasingly pointed up the difference between the behavior of laboratory subjects and their real-world counterparts. People are – after all – the end point of Mr. McLuhan's dictum. The slogan, naked and unrestricted, is naive.

THE QUESTION is whether industry will overlook that breach of confidence and work rationally with communications in the future.

Because the medium can affect perception of a message and – carelessly used – can reshape it beyond recognition, the medium can become the communications *problem*. Industrial communication is an unnecessary dilemma for many today. As meeting techniques become more complex and more expensive, the messages are becoming harder to find. That dilemma is eliminated when both the producers and their clients honestly distinguish between medium and message. When assigning relative importance to medium and message, there are only two alternatives, and their ramifications are easy to extend and compare.

PREMISE NO. 1: The Medium is the Message.

Many audio-visual innovations were developed for the New York World's Fair to titillate mass audiences. Except where their role is identical in the corporate or association meeting

room, the innovations are probably out of place. Others of the radical new techniques are essentially gimmicks. They get attention fast, but the transfer of interest to the message is only incidental, certainly not guaranteed and possibly not even measurable.

The man who sells remarkable equipment and splashy techniques will say that's no problem at all; and for a small (additional) sum he can show you the answer, more of the same. Call it *maxi-media* and shove the speaker aside. Everybody likes a circus – but nobody ever comes away with a message . . . unless it's P. T. Barnum's: *There's a sucker born every minute!*

THE HUCKSTER'S machine is his message – it's not yours. Don't blame the huckster. He believes in his machine – and when properly programmed, it might add to the spirit of your meeting. The huckster often isn't aware that his medium is wrong for your message. Or perhaps – well, when you run a store, you sell what's on the shelf.

MAXI-MEDIA means mini-message in the current scheme of things – if not always, then too often. Maxi-media competes with message, like it or not. It can kill.

It's not that any particular medium – or even multi-media presentation – is a bad thing. Any medium, or any combination of media, can be evaluated only in terms of the contribution made to the clarity of your message; nothing else matters. Cost and beauty are secondary considerations, of little merit in themselves if the message fails to break through the trappings.

Multi-media production is today's programming fad. Like a corner office or a key to the executive washroom, the media are becoming status symbols for middle-management. Ready acceptance is a crutch – an excuse to bypass intelligent evaluation. This bypass is the wrong route. Fad or not, multi-media isn't new as a program segment. It hit the staid world of associations *as an integral part* of the

annual conventions of both the Linen Supply Assn. of America and the Steel Service Center Institute as long ago as 1960.

Integrated multi-media production concepts were developed to support those several-day programs because no single medium would do the whole job. That is still the criterion used by confident meeting planners.

PREMISE NO. 2: The Message is the Message.

Meetings have three distinct components: content, presentation, and audience. Presentation techniques – media – are the only really flexible element, and they must be developed or bent to serve the other two.

The reason is simple – conviction is an effect of empathy, rapport, and confidence in the speaker and his message. Whatever enhances the stature of the speaker enhances his message; whatever minimizes or distracts from the speaker steals from his message.

Consider the program element independently:

*Content:* The message to be conveyed must be comprehensible to the people who will act on it; and therefore it must be:

- 1) Planned and constructed rationally;
- 2) Thought out to explore major ramifications;
- 3) Phrased concisely and explicitly; and
- 4) Presented in a manner conducive to listening, inter-acting, and learning.

*Audience:* They're the reason the meeting was called. They want to gain from the experience, to understand and react, to feel that their participation matters. They resent being talked down to, to getting bromides in medicine bottles, to seeing money wasted on trivia when they need new tools, bigger budgets or smaller membership fees, and even higher personal income. If a meaningful message is delivered in their language, they will listen and respond. Ideas beget enthusiasm.

# HOW

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# MEETINGS

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## HELP SALES

### Plan Ahead For Safe, Long-Lasting Protection

By RICHARD CAVALIER/Contributing Editor

If you happen to meet a meeting planner who has never lost valuable program components because of technical failure, borrow his good luck charm—because few planners are scarless.

Technical failures are mishaps that deprive the audience of all or a significant portion of the intended message. They can be caused by either simple mechanical malfunctions (a jammed projector, a blown light bulb) or human error (forgetful actors, inattentive demonstrators).

The producer of the program is responsible for technical failures, that is, for not providing an alternative medium to save the message. Until recently, failures were considered the client's responsibility. Occasionally, a client wasn't aware of the hazard, but there were no clear court precedents for claim.

The Supreme Court of New Jersey, however, has just provided a precedent in the case of *Newmark vs. Gimbel's* (258 A. 2d 697), holding that when a third party's product is a part of a service rendered, an implied warranty of fitness binds the service agent in the same degree as the manufacturer. We would expect a claim, in a meeting context, to be meeting planner *vs.* producer for technical failure, and later producer *vs.* manufacturer for mechanical defect. Although not related to meetings, the precedent


will have wide repercussions in the convention industry, tending to discourage multi-media displays and staged extravaganzas precisely because the producer will not willingly guarantee their success against all odds.

But having a legal claim won't salvage the remains of a meeting in progress. To protect yourself against failures, you need an alternate medium—a "Plan B"—for each indispensable message component of every meeting. Here are some things to consider:

1. Never commit an important message solely to a mechanical device or actor's memory if you have a choice.
2. When a mechanical sequence is the message (for instance, the company president's videotaped address or a documentary film), determine whether it is more desirable and less expensive to reschedule the meeting or to duplicate the equipment in case of a problem. Fail-safe backup equipment could conceivably malfunction, too, but the odds are on your side.
3. If the message is conveyed mechanically, and neither rescheduling nor fail-safe setup is possible, demand an advance outline of content so the material can be quickly paraphrased from the lectern if necessary.

4. If a specific performance level by participants must result from the meeting, consider the effect of technical failure on this goal. Then prepare an expendable review-reinforcement sequence for emergencies.
5. To bypass potential trouble spots, deliver the prime message from the lectern; give backup status to the machines and actors—even if the producer goes into shock.
6. No matter how trouble-free a meeting plan looks, create a control ring binder for yourself; hold in your hand during the meeting a verbatim copy of every speech and a talk-over outline of every mechanized sequence. Keep your place so you know whether you're on target. Then, if a hitch develops, you're prepared to act.

Keep in mind that because the audience rarely knows in advance what was supposed to happen, they won't know when a Plan B is in progress unless the mishap is grand and unmistakable.

Remember, too, that Plan B adds almost nothing to the cost of the program other than incidental equipment rentals when fail-safe is required. 

March 5, 1973



## WORKING WITH A CONSULTANT

### I-E

Consulting is neither an art nor a science: It is an ethical stance! Without ethical and practical disinterest, there is only bias, however subtle and unintentional.

**PAID ADVICE:** (See “Consultant Evaluator” in this subsection.)

Three major factors are involved in the consulting relationship, and *all* must be operating *simultaneously* for a true and effective consulting opinion to be rendered:

First: The consultant must have a legitimate claim to expertise in the area in which he offers his service. This expertise can be any combination of training and experience acceptable to you, and for practical purposes, it should exceed your own expertise. Marginally-qualified consultants will write marginally acceptable recommendations – to examine and compare the credentials of prospective consultants is your right and obligation.

Second: For a fee, the consultant agrees to evaluate – from your viewpoint and absolutely free of conflicting prior commitment – your problem and objectives and to investigate and evaluate all reasonable courses of action which could yield a solution to the problem. He reports in writing on the relative merits of the most significant approaches and probably recommends one. The consultant cannot guarantee the success of any recommendation – it’s really an expert’s *professional opinion* – but several of the most respected consulting firms in the country refuse – in defense of their reputation – to undertake a controversial consulting assignment unless the client agrees in advance to put their consulting recommendation into practice intact for a stipulated period following the report.

Third: By this ethical stance, the consultant guarantees his client that he will *not in any way profit* from any of the alternatives outlined or recommended to the client. To benefit either directly or indirectly (except for the obvious enhancement of reputation that comes with successful recommendations) is a breach of the ethics and a breach of contract, and the offending consultant is legally liable.

**FREE ADVICE:**

The second point above – freedom from conflict of interest – is implicit in the non-competitive accounts structure used by both advertising and broad-scope sales promotion agencies, as the latter are distinguished from a supplier of any one component service. Yet it is in exactly your waiver of the third point – profit-making on goods or services supplied – that otherwise-qualified advisors become suppliers

insulate the meeting manager from supplier abuses. At the same time, by separating professional opinion by contract from direct profit motives, the meeting manager can keep his supplier-advisor available as a trusted supplier. Because of his frequent prior contact, the supplier-advisor will tend to have an inside track on the bidding. But if his solutions in practice appear to be significantly different from those theorized in his paid report, or if he later wants to eliminate components postulated to his competitors, investigate the possibility that report information was withheld or slanted to increase his advantage. If so, that's a breach of contract. Reject (and don't pay for) a supplier-advisor's written advisory opinion which does not treat all reasonable alternatives regardless of his own specialty . . . and never accept his bid in the future. The convention industry's present crisis is the measure of the need for these demanding procedures.

The relationship of the four categories is obvious: the introduction of an ethical stance, which is almost unknown in the meeting and convention industry. As big as the industry is, it's going to get bigger . . . and the time to improve it is now.

In his humorous book "Up the Organization," Robert C. Townsend wrote that "Consultants borrow your watch to tell you the time and then keep the watch." What Mr. Townsend really said was that top management is sometimes so narrow that it will not accept directly from subordinates the kind of solutions to internal problems which a consultant will arrive at after talking with those same subordinates. If the consultant's prestige and disinterest are all that's needed to validate and implement a good solution, then the consultant has earned his fee. When management learns to listen to internal opinions with an open mind, it will often save the consultant's fee.

"Achieving Objectives In Meetings"  
CONSULTANT EVALUATOR

Consultant's firm name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

Contact's name: \_\_\_\_\_ Title: \_\_\_\_\_

Recommended by: \_\_\_\_\_

(If recommended by another supplier, also fill out the "Something-for-Nothing Evaluator.")

Re: Message (problem): \_\_\_\_\_

Target start date: \_\_\_\_\_ Latest delivery date: \_\_\_\_\_

1. In relation to the specific message, is this consultant being considered (prior to the first meeting) for:

- (a) His specific knowledge of that problem area;
- (b) His general reputation in other related areas;
- (c) His general reputation in non-related areas;
- (d) Considering points (a) and (c): an apparently [acceptable] [good] [superior] prospect.

2. If Item (1-a) is included above, list specific applicable credentials of the firm:

- a) Name of consultant to be assigned: \_\_\_\_\_
- b) Consultant's personal qualifications and credits in this problem area:

3. If answer includes Item (1-b) above, list related credentials and explain their relevance in detail:

- a) Are those credentials really related to our message (problem)? [Yes] [No].
- b) Name of qualified consultant already on their staff: \_\_\_\_\_
- c) If none, how will that firm handle our account?
  
- d) If they will hire a new man to handle it (any man "now on vacation" probably has not yet been hired), can we hire a man for our staff instead? [Yes] [No].
- e) If yes, probable cost (salary, fringes, secretary): \$\_\_\_\_\_per year.

**Consultant Evaluator, continued**

8. All points considered, is this consultant apparently right for us? [Yes] [No] Why?

9. If we contract with this consultant:

a) When can he begin?

b) Can he meet the deadline?

c) What are the chances of overtime or other extra cost? \_\_\_\_\_ % maximum.

10. Final decision in comparing this consultant to other prospective consultants or supplier-advisors also highly qualified:

"Achieving Objectives In Meetings"  
SOMETHING-for-NOTHING EVALUATOR

Re: Message (problem): \_\_\_\_\_

*PRIOR* to first interview with the supplier of the proposed 'free' service, specify:

1. Our understanding of the nature of the proposed service is:
  
2. Amount of time to be spent discussing our problem: \_\_\_\_\_ hours [paid] [free].
  
3. How closely is that service related to our problem or known needs:
  
4. By whom was this 'free' service recommended:
  - a) Referring party's relationship to supplier:
  
  - b) Referring party's relationship to us:
  
  - c) Is this referral standard procedure within referring party's contract with us?
  
5. Does the free service have a definite commercial value? [Yes] [No]. Value: \$\_\_\_\_\_.
  - a) Is the service provided absolutely free to us on contract with no strings attached? [Yes] [No].
  - b) If 'yes,' has the referring party himself paid for it? [Yes] [No].
  - c) If 'no,' how does the supplier expect to be compensated?
  
  - d) Would our anticipated purchases entitle us to equal time and service even without the referring party's recommendation? [Yes] [No]. Why?
  
  - e) Is it possible that the 'free' service is a gimmick for which we will ultimately pay the supplier the entire cost? [Yes] [No]. Why?
  
6. On the surface it appears that we [should] [should not] see the supplier of the 'free' service because: (If 'should not' is indicated, terminate consideration now.)

*DURING* the interview, determine:

7. In the supplier's own words:
  - a) How much time will be spent talking about our problems? \_\_\_\_\_ hours without fee.
  - b) What is the market value of that discussion? \$\_\_\_\_\_
  - c) Has the referring party paid cash for that service; why?
  
  - d) Is the service rendered with absolutely no obligation on our part to this supplier of that service? [Yes] [No]. Hooker:
  
  - e) Are we permitted to use this supplier's information in taking competitive bids on the types of goods or services he might recommend we buy? Conditions:

## PRE-JUDGING THE MEETING

### I-F

If you have decided to call the meeting, you might as well be prepared to pre-judge it, because no one attending will hesitate to judge it afterward.

Personal judgments tend to be subjective, and therefore, no single list of values is acceptable *en toto* to everyone. But all commonly-accepted social judgments – whether for law or art or points between – are based on specific disciplines (or standards) by which the case or art object is adjudicated or appraised. The consensus of men schooled in that discipline prevails and becomes the norm; and merit and quality are thereby identified. These norms prevail until error or legitimate advance (progress) is recognized.

Similarly, although each company has different motivations and needs, its response to those needs, insofar as interpersonal communications are concerned, can also be examined within the disciplines of a) educational principles, b) human relations needs and objectives, and c) profit motives.

If you consistently apply meaningful sets of those three standards to your interpersonal communications problems, the meetings you produce must be accepted as quality meetings unless and until management itself creates different standards for its own interpretation of “success.” When those meetings achieve their problem-solving goals, then they are both creative and successful. (For a formal justification to top management, see “Meeting Justification Guide,” Section II.)

## COSTING A MEETING

### I-G

No one ever forgets to charge the obvious expenses against the meeting: hotel, food, transportation, and outside purchases. But many meeting managers neglect to run a tally on the cost of the time. One week is two percent of a man’s working year – can a week’s meeting add two percent to his productivity as a breakeven criterion? And add a return on that investment?

If your company calculates its overhead and fringes as low as 100% of salary paid, then each hour of a man’s meeting time is worth a sum equal to the number of *thousands* of dollars of his salary: that is, \$8.50 hourly for an \$8,500 junior exec. With major companies estimating overhead and fringes at nearly 200% of salary, the hourly cost of time is 50% higher than the number of thousands in the salary: that is, \$30 per hour for a \$20,000 man.

"Achieving Objectives In Meetings"  
**BALANCE SHEET**

Re: Message (Meeting Title): \_\_\_\_\_

**COST OF THE MEETING**

**1. Meeting room expense:**

Speaker support materials required ..... \$ \_\_\_\_\_  
 Recommended additional materials ..... \$ \_\_\_\_\_  
 Training sequences and programs ..... \$ \_\_\_\_\_  
 Coordination: \_\_\_\_\_ weeks @ \$ \_\_\_\_\_ ..... \$ \_\_\_\_\_

**2. Staff time; \_\_\_\_\_ hours total scheduled time:**

(Formula: \$ "N", 000's salary @ 100% overhead = \$ "N" per hour.)

\_\_\_\_ top execs: \$ \_\_\_\_\_ average salary + \_\_\_\_\_ % overhead x \_\_\_\_\_ hrs. = \$ \_\_\_\_\_  
 \_\_\_\_ middle mgmt: \$ \_\_\_\_\_ salary + \_\_\_\_\_ % overhead x \_\_\_\_\_ hrs. = \$ \_\_\_\_\_  
 \_\_\_\_ first line mgmt: \$ \_\_\_\_\_ salary + \_\_\_\_\_ % overhead x \_\_\_\_\_ hrs. = \$ \_\_\_\_\_  
 \_\_\_\_ salaried men: \$ \_\_\_\_\_ salary + \_\_\_\_\_ % overhead x \_\_\_\_\_ hrs. = \$ \_\_\_\_\_

**3. Facilities:**

Meeting room rentals, if not included in hotel rates

\_\_\_\_ beds @ \$ \_\_\_\_\_ x \_\_\_\_\_ days ..... \$ \_\_\_\_\_  
 \_\_\_\_ meals at average per diem of \$ \_\_\_\_\_ ..... \$ \_\_\_\_\_

or:

\_\_\_\_ breakfasts @ \$ \_\_\_\_\_ ..... \$ \_\_\_\_\_  
 \_\_\_\_ lunches @ \$ \_\_\_\_\_ ..... \$ \_\_\_\_\_  
 \_\_\_\_ dinners @ \$ \_\_\_\_\_ ..... \$ \_\_\_\_\_  
 tips and miscellaneous expenses ..... \$ \_\_\_\_\_

**4. Transportation:**

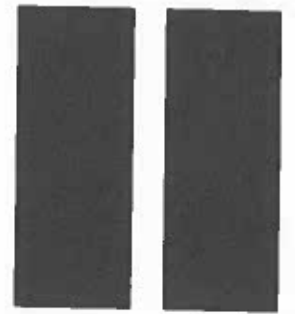
\_\_\_\_ airline fares, estimated; ..... \$ \_\_\_\_\_  
 \_\_\_\_ taxis in-town and airport transfers; ..... \$ \_\_\_\_\_  
 \_\_\_\_ or; car @ \$ \_\_\_\_\_ per day/mile x \_\_\_\_\_ days/miles ..... \$ \_\_\_\_\_

**5. Optional:**

Wives: plus 100% of accommodations and transport ..... \$ \_\_\_\_\_  
 Entertainment ..... \$ \_\_\_\_\_

6. Other: \_\_\_\_\_ \$ \_\_\_\_\_

**COSTS GRAND TOTAL \$ \_\_\_\_\_**



## Agenda and Control



## BUILDING AGENDAS

### II-A

Whether you are planning a central meeting or a series decentralized by self-contained packages and/or simultaneous closed circuit television transmissions, (see Section II-D), the meeting message must reach the same number of men; again the nature of the problem to be solved and the goals established will dictate the proper meeting formats.

Within the meeting format are two distinct categories: the one-way flow of information – generally known as the speech, lecture, articulated monograph or dramatization, (non-agenda: entertainment); and the audience-participation format, itself divided into solution-delivering and solution-seeking types.

#### DELIVERING SOLUTIONS:

One-way information flows are economically served by letter or telephone – skip the meeting! Tightly-structured solution-delivering formats are most commonly known as workshops – the general device for linking an authority and his audience via specific events, experiments, supervised practice, etc. To avoid the implication that the executive or professional participants are being taught or trained, some workshop planners have used the terms *clinic* and *seminar*, ignoring the obligation of the former to provide corrective action and the latter to guide independent (seeking) study. Such misuse has made the distinction of program formats by these terms almost meaningless, even when properly applied.

#### SEEKING SOLUTIONS:

Highly-structured solution-seeking groups in relatively large numbers meeting for a finite period are commonly known as conferences; audience participation is the key! Conference techniques include:

- Discussion: task-oriented, systematic talk about a specific topic;
- Buzz Groups: any number of teams of about six persons who discuss, for about five minutes, their assigned topics and report decisions to the total audience;
- Committees: teams with specific assignments or functions who discuss and research as necessary to obtain the solution or facts reported

accurately measured, you cannot claim success in achieving them no matter how popular the program seems. The decision on format (solution-seeking or -delivering) is made concurrently.

A modest solution-seeking *objective* can usually be achieved in a single meeting; a more complex objective might require several meetings, in which case, interim objectives should be defined to prevent a bogging down. An ambitious solution-delivering objective will probably bring many interrelated events together over a period longer than one sitting – and therefore, the events must be declared a convention.

As illustration, consider these rationales:

a) Objective: To establish a uniform collection procedure for overdue accounts. Problem: The Sales Department objects to the harsh criteria applied by the Credit Office and will not accept the drafted procedures. Alternatives to a meeting: None – one cannot argue, persuade and compromise by memo. Conclusion: We need a solution-seeking meeting (interchange of opinion) to establish the criteria acceptable to both. Duration: Two hours.

b) Objective: To create a technical sales presentation for important new prospect. Problem: The first project of its kind for us; only two of five staff members have had contact with the prospect, but all must cooperate. Alternatives: None – impossible to create by memo. Conclusion: A series of meetings including:

1) Strategy session; assign responsibilities for research of potential methods and ballpark costs;

2) Hear report on potential methods and adopt one for development; assign responsibilities for finalizing;

3) Read final draft; meet to adjust, improve, okay with minor revisions for submission.

c) Objective: To produce an immediate 10% general sales increase over the same quarter last year, stabilizing at 5% over the next twelve months, measured against the preceding year. Problem: A new marketing approach will be introduced, and each of three current products must be treated. Alternatives: Film only, since demonstration is required; yet individual instruction cannot be given by film alone, since progress cannot be monitored. Conclusion: A formal training period is required, and tools must be developed; however, present sales supervisors can easily handle a well-constructed program package. Duration: One full day.

d) Objective: To introduce a new product line to dealers and gain 4% in market share over last year. Problem: Splashy programs have made dealers buy enthusiastically in previous years but have left their employees in the dark about proper selling techniques. Alternatives: We must apply a “selling through” principle, in place of a “selling to,” and that seems to require training for the dealer’s own employees. Interim

practicality with other useful and filler functions so as to result in a convention. In theory a convention can last only one day and can have a very small audience – justification of the time and expense of preparing and attending *at all* dictate the ambitious program, especially for the voluntary audience.

The distinction between meeting and convention is quite clear . . . make it serve your purposes. (See “Objectives Profile,” following.)

## TURN NOWHERE MEETINGS INTO SOMEWHERE MEETINGS.

by Richard Cavalier

Attend too many meetings? Many of them are called by Meetniks-people either disguising the fact that they have nothing to do or spreading the blame for an impending crisis. Meetniks welcome the nowhere meeting.

A meeting with an announced topic and objective — an established agenda — exposes indecision and incompetence. Agendas make quite clear where the discussions are headed and what they are worth in terms of the stated objective.

Why talk meetings to men who plan, design or produce sales promotion programs? First, you probably can't avoid meetings, so you might as well make them work for you. Second, because sales promotion programs are important selling tools for a company in the face to face meeting of its salesmen with its customers — certain adult learning and communication principles apply.

And promotional materials can turn your participation into valuable exposure for your program or product, sometimes in front of a company's top management.

One reason so many major meetings fail is that no one has decided in advance whether the meeting had to be informational or instructional. These are vastly different concepts.

**INFORMATIONAL MEETINGS** are solution seeking — those in which facts are presented, and resulting opinions are stated and argued. These meetings must be small to be effective. If the interplay of opinion is not necessary, then cancel the meeting and exchange information by mail or phone.

**INSTRUCTIONAL MEETINGS** are solution-delivering — those in which the behavior or attitudes of individuals must be changed as a result of the facts presented. Any number can play. Detailing the required new behavior — and making it practicable in concrete terms using concrete tools — is known as training. Training is a prime sales promotion technique!

Much sales promotion is aimed at or around the salesmen. Salesmen cannot be expected to convert random facts into instantly polished and proved sales presentations — the gap is too great.

If the facts are presented in company jargon, which everyone except the customer understands, then

the salesman must either translate terminology or replay the jargon to the customer. Both are unsatisfactory in terms of sales.

Even when a promotion is aimed around the salesman to the prospect, the objectives are identical — change (occasionally reinforcement) of behavior or attitude. Therefore the training function — the application of general theories to individual men and situations — cannot be ignored.

**THE MAN RESPONSIBLE** for accomplishing the objectives of a meeting cannot spend all his money on a one-time spectacle for the screen — pretty pictures here today and gone forever. He must spend some of that money on materials and tools which will reinforce his message in the minds of participants after they leave the meeting room; or implant his message in the minds of potential and present customers — or both.

Sales promotion materials, as a consequence, are indispensable components of any instructional meeting, any competent marketing program.

If you are buying training or other sales promotion tools outside the firm, decide what's wanted and what's needed. If you are supplying those tools, do you understand the message and agree with the needs?

To get optimum results in the least time, here are some key steps.

1) Interview as many as a half dozen potential suppliers.

2) Discuss the general outlines of your project with the two or three potential suppliers who seem best suited to your needs. If they remain interested, invite them to comment on approaches in writing and provide a ballpark estimate of cost.

3) With the one best bid in hand, ask for a detailed outline and firm cost. If it is not acceptable, ask for revisions. If the revisions are not right, pay the man for his time and fire him. Repeat this step with another supplier.

4) When the detailed outline is acceptable, fine-tune it and authorize production designs and prototypes or scripting. He's on your team — holding back information, money, or good ideas will jeopardize results.

If the sales promotion materials being produced are tangibles, those steps will probably cover most situations. But if you are buying training

and ideas, here are some additional guidelines:

1) Is he pushing a solution or product before he understands the training problem? If so, he's a fraud.

2) Is he offering a speaker from his roster of "teachers" not on his staff? If so, he's a speaker's bureau masquerading as a training consultant. Beware.

3) Is he pushing roundtable discussions as the solution to major problems? That's an amateur's favorite cop-out because it eliminates for him the critical tasks of discovering sources of know-how, validating the conditions, quantifying the results, and pre-testing the recommended solution. Roundtable techniques are fine for establishing camaraderie or gathering opinions that are not critical, since talkers usually overwhelm thinkers. Suspect fraud!

4) Does he consistently produce winners? When his list of clients is impressive, be sure he hasn't worked for everybody once and nobody twice. That means a few phone calls to his clients that you select; however, the failures are not listed in any case, so probe!

5) Does he sell the same ideas and materials over and over again? From his client list, pick at least four names and review all materials: Are they unique or carbon copies of each other?

6) If you are knowingly buying a "library" program, how much are you paying for the rights and how much for personalizing? Total cost should be one-third or less as compared with custom programs.

7) Is he offering to construct a custom program on a time or tangible-unit basis? Does he quote his day or unit rate and suggest one hour's finished training program for one week's work? If so, he probably knows his business — hire him!

If you consistently apply the precepts of agenda and communication principles to every meeting you plan, you're in danger of participating in the most productive meetings your firm has ever held.

How much harm can that do? ■

June, 1970

**“Achieving Objectives In Meetings”  
OBJECTIVES PROFILE**

**Message:**

**1. Meeting Objective:**

**2. Problem:**

**3. Alternatives:**

**4. Apparent Action Required:**

**5. Interim Decisions Required:**

**6. Problems Generated:**

**7. Resolution of Problems:**

**8. Final Decision:**

**9. Objective Restated or Confirmed:**

## SCOPE IN MEETING STRUCTURE

### II-B

Competently designed meeting programs provide for training of the individuals who hear the meeting message. There is neither reason nor excuse for eliminating the training sequence.

Yet, while the training sequence itself is standard, there is absolutely no standard training format!

Fads in the training field have whipped neophyte trainers (and meeting planners) about from *it's-gotta-be-programmed-learning* to *it's-gotta-be-simulation-games* to *it's-gotta-be-computer-assisted*.

*TRAINING DON'T GOTTA BE NUTHIN' . . . TRAINING GOTTA DO!*

If any method converts theory into a single man's personal practice, that method is training. And it's valid.

One of the reasons training fads occur is that each new fad promises to take the message to the multitude faster and better than ever before. As the recognized need for training and its related solution-delivering meetings grows, so does the crowd who need the training. The huge numbers themselves tend to stampede the uncertain trainer into any fad which promises to multiply his effort.

But it is the basic structure of the meeting and the intrinsic value of the training technique taught which determine what the program will accomplish. The "name" formats are in themselves meaningless. Training is pragmatic – if a method works, it's good. If it cannot be improved, it's superior and rare!

Take as an example the simplest of problems – how to dial a phone. The skill can be programmed in several formats:

a) The authority can train each person in the company individually or in small groups by explanations, demonstration, and practice; or

b) The authority can script his presentation and conduct the initial training session; but then offer the script so the newly-trained employee becomes a trainer; or

c) The authority can both script the verbalized information and demonstrate by proxy: sketch or photograph (or capture both on videotape); then the training sequence is a self-contained package which can be adequately controlled by any appointed "trainer" – even one who has no prior knowledge of how to dial a phone.

Every training meeting which you ever structure will be a variation or combination of those three basic formats. It is the *control* structure of those formats – the physical and capability demands made on the trainer – which determines how many people can ultimately be reached.

Notice that the theories of electronics and switching mechanisms have no part in the nucleus program – how to dial. Stripping any

## A New SM Department

# Meetings Management

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By RICHARD CAVALIER/Contributing Editor

## Formidable Sales Weapon: The Packaged Meeting

Accustomed as sales executives are to planning their own meetings, they often miss the boat on an effective marketing tool: packaging sales meetings for their distributors and dealers to use in improving *their* sales force. Sometimes a dollar spent in this area produces better results than a dollar allocated for advertising or a lavish dealer convention that only the boss attends.

Your customers have just as many meeting problems as you do—more if they don't have an equal meetings budget. By determining which related personnel problems are common in the customer industry, you can select those most logical for you to tackle. Rough out a structure and ask your key customers whether they might like assistance with those problems via your meetings package. Few will refuse, and most will offer to advise.

They will probably want help in two main categories: how to use your product to best advantage or how to sell theirs. If they are reselling your product in some form, that's a natural.

There's no *best* format. It's a matter of knowing what needs to be done and doing it, much the same as if the problem were yours. Set goals and measure achievement—yours and theirs. Here are three radically different approaches to the idea.

- A major aluminum producer packaged a six-hour program to sharpen the selling skills of its distributors'

sales force. It was designed to be conducted in two to four sessions.

- An international industrial chemicals firm created a three-part program to upgrade the attitudes and job skills of the kitchen employees of its industrial feeding customers. This had to be translated for worldwide application.

- Numerous savings and loan associations have engaged a well-known inspirational speaker to conduct attitude and selling-skills seminars among local realty firms that can produce more loan business for the associations.

Deciding whether skill or attitude training is needed (or a combination of both) is crucial. Skills can be taught from general theory, plus employee practice, but attitudes must be explored individually before being generalized into a program. Research and lead times differ greatly as a result.

Once research is complete, the decisions about meeting formats practically make themselves. The structures are many. For example, your training manager can coach their training manager or even instruct their field sales manager and their sales force directly; or your field sales managers can instruct their field management or field force directly.

### Figure on \$2,000 an Hour

The number of capable instructors

you can assemble (and a competent salesman usually has the basic skills) and the number of customers and their employees determines the most practical format. Always, your representative should participate in or at least attend every session.

Be sure to present the exact program you promised. Give the program free. Let the customer pay for coffee or other hospitality for his own people. Costs for a customer meeting package can be accurately projected with a simple formula that works out to about \$2,000 per hour's program time for format and scripts. Research time and production of tools (workbooks, visuals, etc.) are extra, as is staff time for teaching, although this is actually absorbed in current salary.

In general, the development cost of a customer meeting package will not exceed that of preparing an ad campaign, and meetings have more staying power. What's more, meetings have a striking competitive advantage because you can announce a series of packages, if appropriate, and preempt your competitors.

With these or similar meetings techniques, you are cementing a customer relationship. It's a gift-giving that benefits both employer and employee—a goodwill generator that demonstrates the caring you proclaim. ☐

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May 29, 1972

## TELLING IS NOT TRAINING

### II-C

We've made two points worth repeating in this context: a) detailing the required new behavior – and making it practicable in concrete terms using concrete tools – is known as training; and b) . . . the objectives are identical – change (occasionally reinforcement) of behavior or attitude; therefore the training function – the application of general theories to individual men and situations – cannot be ignored.

In short, H<sub>2</sub>O is lectern theory; but water as liquid, vapor, and ice is the workshop experience, the training situation.

Yet the majority of large group meetings and conventions called by companies are concerned primarily with an announcement regarding general sales and product promotions. What is most remarkable about these sales meetings and seminars (call them what you will) is that they are so often represented as *training* when in reality they make no effort to convert ideas and theories into practicable units *meaningful to and usable by* the man supposedly *trained*. No amount of maxi-media exposure from the lectern can make that conversion from speech into methods! In terms of what they claim to be, such meetings are worthless. That they might accomplish incidental beneficial effects such as improved morale (unquantified, always!) is not of itself a justification for a failed training meeting.

In association conventions, the failure comes in the abandonment of the message to the ears of men (often top management) who do not themselves implement the recommended changes and cannot – after one hearing – instruct their subordinates in detailing and instituting such changes. The result is wasted years and lost potential for many association programs admirable in theory. For associations, take-home training packages are the viable alternative to lost effort and persistent communication problems.

What is confusing about the two categories – study vs. training – is that a meeting which closely resembles a school classroom does not necessarily train, although it might teach (or permit the audience to learn, as you will) measurable units of knowledge or information. Hiring a professor to mouth it doesn't make a lectern address an "education-oriented" workshop/training sequence.

And the crux of this seeming contradiction is simply that adult schools and seminars and lecture programs all present many general principles upon which the student can draw in the future when meeting specific and unforeseeable problems; yet, in the corporate meeting room the employee (student) already knows the problem, shares it with many others, and needs help both in identifying the one most pertinent principle and in converting that principle to practicable units of knowledge which itself or through tools can be applied to the common



As described in Section II-A, the training meeting format which answers all those needs can be a) wholly live; b) partly live and partly "canned"; or c) totally "canned." Similarly, the commercial packaging of those formats under a generic "name," such as programmed learning, computer assisted instruction, and simulation games, cannot assure applicability or success of the material contained in them. Each generic format has its own advantages and weaknesses, and the type of problem and the type of trainee both need careful consideration before committing to any format on the basis of numbers.

Here are key concepts to keep in mind as you choose:

a) Programmed Learning: Complex, requiring the cooperative efforts of authorities, trainers, psychologists, maybe sociologists, and also abundant control testing; the true PL format is rare. But untested, uncontrolled quack versions proliferate by invoking one of the highly visible features of PL – small bits of information sequentially presented in "frames." Frame formats often accomplish more than the unstructured materials they replace, usually because the original text was poorly organized. No one has ever *proved* that a PL format outperforms other formats properly prepared in their own disciplines. On the negative side, framing has a tendency to destroy concepts, which are synergistic, not cumulative.

b) Computer-Assisted Instruction: Two distinct uses of computer capability. First, when programmed with facts and go-no-go instructions, the computer can respond as a teacher to the particular choices and errors the student makes on his formulated lesson; unprogrammed questions cannot be asked. It's expensive. Second, as a huge adding machine, the computer can project in seconds the consequences of any economic decision a manager might make in simulation game decision situations – raising or lowering prices, competitive response, favorable or unfavorable market conditions. Several years' consequences can be seen in minutes or hours in the training room instead of in the annual report. Expensive to program, but cheaper than an Edsel.

c) Simulation Games: Committing all applicable theories and methods to rules of a game reproducing in simulation actual job conditions and problems, it's as good as the simulation is convincing to the trainee. Research has demonstrated that games are *another* way of learning for people who are not skilled in traditional classroom techniques; however no one learns *more* via games than via well-structured formats of other types. Used as a *companion* piece for traditional formats, games might by novelty or actual applicability help to lift understanding toward the 100% mark among large numbers of trainees.

Training needn't be labeled as such. This text is itself a type of training program in that it presents principles and theories (authority)

## **Workshops Make Sure That Your Message Lingers On**

By RICHARD CAVALIER/Contributing Editor

**N**o matter how closely reasoned your message and how fair the task you assign your meeting participants, each man must believe in his own ability to perform before he can work to capacity. Simply stating your meeting message is no substitute for explaining it, demonstrating its function, and supervising its application.

Obviously, every man needs a chance to practice putting the message into action, whether this entails an entirely new activity or merely a modified sales presentation. It's logical then to make workshops an important part of your meeting.

Management needs to monitor these practice sessions so that hitches on the part of either the trainer or trainees occur harmlessly in the meetings rather than expensively in the field. Thus, training workshops answer the needs of both parties.

Creating a viable teaching meeting is not a complex task. Any procedure that permits the individual to convert message theory into practical field formats is a valid workshop sequence; and it is valid training when a qualified supervisor can ascertain that the trainee has performed the correct response three times in succession. Three correct responses is the adult educational criterion for "learning," a standard, incidentally that rules out the stage spectacular, live or filmed, as a training tool.

### **Interaction Is the Key**

Even the best stage program is, in the last analysis, a lecture in that it provides only a one-way flow of information. Adult education demands a series of dialogues: interaction between trainer and trainee and among trainees.

Effective supervision in an unregimented atmosphere requires small

groups, so seven to nine participants is the ideal workshop size. The field office group is the logical breakdown even if managers do not teach their own subordinates. Twenty is the largest group that any but a professional trainer should attempt to supervise.

No one argues the need for workshops in theory, but, in fact, two common situations conspire to rob sales meetings of that indispensable component: a) the lack of available space in hotels, other than the main ballroom or auditorium; and b) the tendency of central meetings to burn up funds being grand, e.g., with spectaculars, leaving no cash for necessities.

Meetings without workshops, are often popular but usually unsatisfactory. So, if no hotel can provide the range of rooms needed because of group size, cancel the central meeting and switch to regional sites. There are many benefits to decentralized meetings (SM, Aug. 21).

Because no meeting can remain in session until the very last man performs satisfactorily, even a central meeting with good workshop sequences will benefit by reinforcing learning with a coaching session in the field a week or so later.

Progress in both the original and follow-up sessions is easily monitored. You can safely assume zero prior knowledge of new products or markets, and a final exam is sufficient to determine if you've hit the target. The test need not necessarily be a schoolroom exam paper. It can be a demonstration, the nucleus of a sales pitch, or any other job-related activity that can be graded with reasonable accuracy on a standard scale. Comparing subjective evaluations by several judges is unfair in group competitions, not to mention inaccurate.

### **Avoiding Costly Mistakes**

Sometimes, pre-testing is an indispensable adjunct to workshops. Similarly, follow-up sessions require pre-testing, so the amount of prior learning of each man is accurately established before the training begins. All tests should be quantifiable. Offering the identical test for pre- and post-test sequences makes it easier to compare scores.

Sometimes, through a home-office miscalculation, the training response is different from that anticipated because of misinterpretations on the part of managers and salesmen. These hitches can be dealt with directly in the training session at the original meeting, eliminating the trauma that can occur in the field.

From the salesman's viewpoint, workshops provide a chance to talk back; to check out his own personal interpretation of the message against the official version; to assess policy changes; and to decide how it all affects him.

In the workshop, where mistakes don't count, any salesman is eager to try new things, to get his manager's help instead of criticism. It gives the man the feeling he is being managed by professionals.

When each man heads for home, not only do you both know he can perform the tasks the meeting message requires but he is mentally committed to making it work. The right sales assignment—backed by test-induced confidence—can't miss in the marketplace. **SM**

October 2, 1972

"Achieving Objectives In Meetings"  
**TRAINING PROFILE**

Message (Problem):

1. State objectives of the meeting in quantified (not necessarily dollar) terms:

2. Skills and attitudes to be [changed] [reinforced] to achieve those objectives:

Item:

Changes required:

_____	_____
_____	_____
_____	_____

3. Alternatives to a meeting, if any, and reasons:

4. How can those changes be measured:

a) During the meeting's workshop sessions (consider tests, roleplaying, demos, etc.):

b) Short term—after initial interval of 2–4 weeks:

*Including:*

- 1) Manager's standard-form appraisal of man's actual sales presentation;
- 2) Man's dollar performance measured against quota assigned;
- 3) Man's dollar performance measured against his co-workers (contest?);
- 4) Other:

c) Long term—after 2–6 months:

*Including:*

- 1) General company improvement target of \_\_\_\_\_% [absolute] [compared to previous period \_\_\_\_\_] or [both];
- 2) Man's own achievement of \_\_\_\_\_% improvement or better [absolute] [compared];
- 3) Freedom from defective performance as measured by:

4) Other:

**Training Profile, continued**

11. Final statement of measures to be applied:

a) At meeting:

b) Short term:

c) Long term:

12. Acceptable performance criteria based on Item (10) and (11) above:

Quantitative:

Qualitative

13. Is the total anticipated cost justifiable on the "Balance Sheet"? (See Section I-G)  
[Yes] [No]. Discrepancies:

*Resolution of Discrepancies:*

14. Final decision on the training value of this meeting:

## IS "BIGGER" BETTER?

### II-D

Is the big crowd really productive? Some meetings of large size are unavoidable; the annual stockholder meeting and the association annual business meeting, with convention attached, are both legally required, and all qualified individuals must be permitted to attend. Dictated size dictates formats.

But for most meetings, size is discretionary. Size can become a handicap and itself an unnecessary expense. When the size of the crowd grows so large that the product itself cannot be used as a tool (see Section III), then the cost of making maquettes or slides is an extra cost of size. Although the initial cost-per-person of a slide presentation is high for the first fifty or so people, any substantial increase in audience size — which should, theoretically, substantially reduce cost-per-person — simultaneously requires larger screens, which in turn ultimately require larger rooms, more expensive equipment, and more elaborate presentations to fill up the huge stage in that mammoth room.

The maxi-media show is in this sense a cannibalistic creation feeding on its own size!

The hidden, unproductive costs of the big central show are staggering. The staging and lighting costs and the difference in airfare between regional office and meeting city are a "central" cost. The use of larger, more expensive hotels is often a direct consequence of size. And since the ultimate consequence of the huge auditorium-type program can be a total loss of the training opportunity, the overall central program can become preponderantly wasteful of everything put into it!

If tradition is the excuse, dump it. The only tradition that matters is achievement . . . and in meetings, achievement of objectives usually comes in less than maxi-media proportions.

The argument usually given in defense of the central meeting (splashy or not) is that it's good for morale. To a degree it is, because camaraderie is a good thing for any group. But is the meeting the only source of morale boosting? And are there no alternatives? And if you spent "camaraderie" cash locally, could you achieve as much or more? At less cost?

If the central meeting is cancelled, the regions could carry out most of the same functions, with the attendant value of upgrading the apparent authority of regional authority.

Then if the chairman of the board insists on addressing the field force assembled, suggest he do it by closed circuit television or telephone conference calls — both live enough for his ten-minute blurb. Or commit him to videotape and let him have a copy to take home — better than home movies.

HOW

# MEETINGS

HELP SALES

## For Best Results, Toss the Ball to Field Managers

By RICHARD CAVALIER/Contributing Editor

As the last salesman drifts out of the plush hotel after the annual sales meeting extravaganza, more than one sales executive has wondered, "Is all this really necessary?" Perhaps it is—sometimes. But the fact is that master meeting outlines and packages can give your regional meetings much of the consistency of a central session at far lower cost. At the same time, local meetings enhance the management skills of field supervisors.

Sources of savings are many. Obviously, you reduce or eliminate transportation; use smaller, less expensive hotels; and avoid converting a meeting hall into a temporary auditorium or theater. Subtly, you obviate the psychological need to spend money on a central meeting so as not to look cheap. Because such expenditures are not directly involved in the transfer of essential information, your meeting content is in no way compromised.

Actually, there may be serious drawbacks to staging a large national powwow. If the main message has different implications for various regions, the central meeting can confuse participants; and regional meetings reflecting the local conditions are highly desirable. In fact, the biggest obstacle to field meetings may be the reluctance of the home office staff to admit how little of any total meeting agenda involves complex or extremely technical data for which their expertise is required. It's largely a matter of ego.

Deciding whether to have a large central meeting or several smaller ones is usually a matter of weighing the degree of consistency required against

the cost of getting everyone together at the same time. The first consideration is the extent of leadership and sales experience available in the field: information about current products and services, customers and prospects, and general market conditions by area. Field managers generally won't know (a) the latest research data, and (b) how to involve their own men in a meeting on that topic.

Consistency of the critical message segments can be mechanically assured with cassette or videotape or film for delivery in a dozen destinations simultaneously. So the question of personal appearances usually amounts to one of internal politics, not pure communications.

Some companies furnish a rudimentary agenda to field managers (speak on Subject One for 25 minutes; Subject Two for 20 minutes; discuss for 15 minutes) and wonder why results are ragged. The answer, naturally, is that a dozen men will develop identical facts a dozen ways, each valid in the mind of its creator.

One way to eliminate this confusion is to provide not only an agenda but a master meeting outline, complete with lead phrases, to at least I-A-1 detail (see illustration). The outline automatically controls the selection of material, its development, context, testing, workshop sequences, and future assignments. What's more, an outline costs much less than a verbatim lectern script, which averages \$2,000 per program hour if bought outside. Outlines also force home-office people to develop logical programs and assignments, if only be-


cause non sequiturs glare on paper.

### Packaged for Salutary Effect

In many cases, the outline alone is sufficient. In meetings with taped segments or preprinted workbooks and tests, however, you will automatically ship a package. It's that simple.

Yet the effect on field management is salutary. First, top management boosts morale by tacitly recognizing that the field *does* know something. Second, regional differences are provided for in the master outline; there is little for salesmen to unlearn. Third, the local manager's authority with his staff is bolstered through teaching. Fourth, the manager develops confidence in his own ability to conduct effective meetings and thus, to lead.

Managerial development programs often take first-line managers out of the field for several days or a week. Outlined meetings don't. Yet, over a period of several meetings, the manager learns exactly what constitutes a cohesive, constructive meeting, and he will apply these principles not only to his district sales meetings, but to even the most casual get-togethers that he has with his men.

So, small meetings run by local managers are truly a dual-purpose medium: They transmit sales messages from headquarters and at the same time build up the leadership capabilities of field managers. It's a great way to put across the basics of management development—informally and for free. 

August 21, 1972

## PROGRAM DURATION AND SCHEDULING

### II-E

According to legend, when Lincoln was once asked, "How long should a man's legs be?" Abe answered, "Long enough to reach the ground."

If you know what the meeting's objectives are, you also know when they have been achieved; then stop! In a solution-seeking meeting, it's easy to calculate that point, but in a solution-delivering meeting (or one in which later sales results are the criteria) the interim objectives which the formal meeting can achieve must be estimated. When in doubt (and it's always wise) arrange a pre-meeting test performance of the basic training sequences. Never cut back on the apparent time requirement, since group efforts always consume more time than individual test situations.

One of the curiosities of companies is that their employees develop a group personality . . . and after one or two sessions, an alert meeting manager can sense the type of program and the duration of time over which his audience will respond. That attention span is longest for programs which appeal directly to their needs. There's not much excuse for any other kind.

Since company men would rather meet on company time; and since non-payroll associates would rather not waste their business hours in your meeting room, schedule accordingly.

For payroll people, estimate that one long day (with an overnight stay preceding, if necessary) is better than two partial days; Mondays are best for starting, but never begin on Friday; consider full or partial weekend stays when the meeting is held in a geographically desirable area so wives can join at their expense; when more than two weekends are involved, send the men home for the third or fourth, or pay the wife's weekend expenses.

For associates (affiliates, reps, guests) not on payroll, schedule tightly for one evening hour, but not more than two, preferably before they go home to dinner; never request trips or overnight stays without clarifying expenses in advance; plan a series of meetings with non-payrollers only with their advance approval of the idea and preferably the dates.

For all the emphasis on brevity, don't overlook the need to provide a program which has enough content to justify the expenditure of time and effort on the part of the participants. There's no way to pay for boredom or to buy off the resentment that comes of over-promising and under-performing.

## PROBLEM IDENTIFICATION

Although there are many justifications for gathering information, the most common purpose is to provide the rationale and quantitative data to be used in defining and solving an apparent problem.

Everyone has problems. Almost everyone finds it more comfortable to endure problems as nebulous areas rather than a number of specific, defined discordances demanding direct, personal action. Undefined problems can be solved only by accident. And the old conservative cop-out, "let's wait and see," is in reality an attempt to avoid confronting the problem by waiting for it to eliminate itself. That's also poor management, however common.

Occasionally there's another category – the unrecognized problem. If no one articulates his problem, then it's not likely that several individuals know they share a similar problem – and so the company doesn't know it has a wide-spread problem on its hands. This type of situation occurs frequently among the field sales force.

If incidental comments or complaints during conversations lead you to suspect a common problem area, here's what you do:

- 1) List every significant related problem of which you are aware – define each succinctly; look for "holes" in apparently-related problem areas.
- 2) List tentative solutions if any exist; keep in mind that a problem previously considered "solved" might have been too narrowly defined and now is showing variations.
- 3) Earmark the known unsolved problems for group response; on the basis of past conversations (and maybe additional phone calls), try to establish parameters on the suspected areas.
- 4) At least a week prior to the meeting date, announce an open discussion on problems and complaints; direct each participant to bring notes and documentation on any situation which troubles him or his subordinates. Do not require them to identify and define specific problems and solutions, or they'll turn off.
- 5) At the meeting, create the feeling of an open session by asking the nature of each participant's main problem or complaint. Jot each problem on a blackboard (complaints are unanalyzed problems). When each new problem is mentioned, ask how many men share it, and make an appropriate note. The group should act first on those areas common to the greatest number of participants.
- 6) Now announce your prior interpretations from point (1) above. Ask them to identify or eliminate any new areas contained in your list. Guide them without prodding – this is a discovery session:
- 7) Regroup all individually-stated problems from all sources into broad categories of logically-related topics. Direct each participant to



3) Create a preliminary agenda (suggested version provided at the end of this section) by arranging the definition and solution criteria in their most logical pattern, beginning with elements requiring the least prior knowledge and ending with those requiring the most. Estimate the time required to deal with each element sequentially.

4) Discuss the definition, criteria, and preliminary agenda with one or more associates qualified to comment on the problem. Adjust the material to reflect valid suggestions and criticisms.

5) Structure the revised preliminary agenda into the working agenda.

6) Announce the meeting; distribute the working definition of the problem as an integral part of the announcement. Outline the criteria for solution to set the participants thinking in advance of the meeting.

7) Stipulate that participants must come prepared with documentation, statistics, and facts which have a direct bearing on the problem defined. State that they are not expected to provide ready-made solutions to the group.

8) In conference, give the participants free rein on discussion as long as they observe the general strictures of the agenda. Interchange of opinion is crucial. The brainstorming variation demands that no value judgments be made on any comment or proposed solution. If they believe the definition or agenda is faulty, then amend it and proceed accordingly or fight it out. But make the decision before proceeding beyond the point of challenge, whenever it occurs.

9) Honor the (original or amended) agenda. Do not get bogged down on small points, and do not continue if discussion founders on a point beyond which, lacking facts or agreement, no further decisions can be made. Adjourn and reconvene when necessary material is in hand. When rethought, the material already in hand might provide the insights you need for solving the problem without reconvening.

10) Record or otherwise transcribe all proceedings for a permanent record. At the end of discussion on each element, summarize – for group approval – a running tabulation on direction and achievement.

11) If a valid solution is produced at any point, whether or not the entire agenda has been covered, examine it thoroughly, hail it if it meets all criteria for solution, and adjourn the conference. Adjourning ahead of schedule wins honors. Otherwise, adjourn when you have all the information you need or can get for further personal action.

12) Send a thank you letter to each participant, noting that his contribution to the team effort helped the conference to succeed. If you skip the letter, hurt feelings and counter-claims for credit might sour group memories and so prospects for the next conference.

If several adjournments do not provide the basis for a solution, consider that a) the problem is not properly defined; b) the solution

**"Achieving Objectives In Meetings"**  
**PRELIMINARY AGENDA**  
**(Problem-Identifying Meeting)**

Problem Area:

1. Purpose of the meeting:

2. Who should attend (by name, department or title):

3. Who should be informed even if not attending:

Prior:

Of results:

4. Details:

Time: \_\_\_\_\_ Place: \_\_\_\_\_ Duration: \_\_\_\_\_

5. Topics to be discussed:

Time allotted:

- a)
- b)
- c)
- d)

6. Apparent "holes" or curious relationships worth exploring.

7. Prior preparation required of participants:

8. Objectives of discussion:

9. Action to be taken if meeting objectives [are] [are not] realized:

10. Future meetings (programs) to result:

"Achieving Objectives In Meetings"  
**PRELIMINARY AGENDA**  
(Solution-Delivering Meeting)

Message:

1. Purpose of the meeting:

2. Who should attend (by name, department or title):

3. Who should be informed even if not attending:  
Prior: \_\_\_\_\_ Of results: \_\_\_\_\_

4. Details:

Time: \_\_\_\_\_ Place: \_\_\_\_\_ Duration: \_\_\_\_\_

5. Topics to be discussed: Authority (speaker): Time Allotted:

- a)
- b)
- c)
- d)

6. Training sessions completed (or programs begun) related to above:

Topic:	Skills/Tools:	New/Modified:
a)		
b)		
c)		
d)		

7. Prior preparation required of participants:

8. Action to be taken if meeting objectives [are][are not] realized:

9. Future meetings (programs) to result:

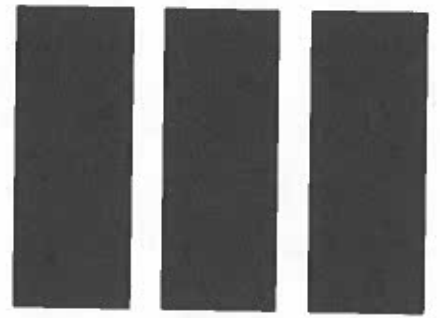
"Achieving Objectives In Meetings"  
**MEETING JUSTIFICATION GUIDE**

Write a brief covering memo enclosing all, or those pertinent forms, among these:

- a) "Message Profile" (See Section I)
- b) "Audience Profile" (See Section I)
- c) "Balance Sheet" (See Section I)
- d) "Objectives Profile" (See Section II)
- e) "Training Profile" (See Section II)
- f) "Preliminary Agenda" (See Section II)
- or
- g) "Working Agenda" (See Section III)

**NOTE:** Because of some duplication of content of the guides as well as the simplicity of some meetings, you will rarely use all of the guides listed—nor use the same combinations each time. But the same selection of guides which make each proposed meeting *meaningful* to the meeting and training managers will make it *defensible* to top management.

After the meeting, the same memo and forms will provide the objectives standard against which meeting results are measured.



Tooling Up

## THE SPEAKER AS AUTHORITY

### III-A

No one should ever be permitted to take the lectern before a large group unless a) he himself is an authority on the matter discussed; or b) a recognized authority has prepared the material he is delivering, and the speaker acknowledges that source.

For an audience to discover that any speaker is not indeed the authority his material represents him to be is tantamount to their rejecting his message, however valid it might be. Further, being the center of attention requires the speaker to be prepared, quick, decisive, and right. Discrepancies that might pass unnoticed or be amended casually in a small-group discussion are magnified before a large crowd. Since they can't speak up, the crowd tunes out; it might never tune back in.

The word "speaker" is not a catchall, meaning merely "one who talks." It does not in the least imply that one of the ubiquitous "public speakers" is a substitute for an authority on the specific topics on your agenda.

Behavioral studies have proved that people accept suggestion and are swayed in direct proportion to the *perceived authority* of the speaker. Advertising capitalizes on that mental set when it dresses actors in medical smocks to sell home remedies. Once convinced, the same audience tends to forget who said it (only an actor) and retains, if anything, the message the actor delivered.

Applying the same principles in the meeting room, one schedules highly-respected individuals to increase the chances of acceptance of a debatable position. Conversely, if the most knowledgeable – if unknown – person is at the lectern, he will be able to make his expertise apparent – even because of challenges by the audience. The speaker who betrays his authority – goofs – probably will lose his argument, whether or not he is right in his basic position. The human mind has an impressive ability to retain negative impressions of speakers.

When a crucial topic is beyond the speaking or leadership skills of the staff person who knows about it (not uncommon among scientists and engineers, whose discipline is non-verbal), consider augmenting that person with a better speaker from his own marketing team. Let

# HOW **MEETINGS** HELP SALES

## The Fine Art of Getting People to Talk Back

By RICHARD CAVALIER/Contributing Editor

Although every speaker wants to believe he is in control of his audience, only the most professional of speakers is ever willing to admit that there's a limit to what can be accomplished by talking to a group from a lectern.

The lectern address, even if rational and clearly stated, does not permit the two-way flow of information required for effective communication and adult education. Neither does it permit a useful measurement of achievement of the group. That is, no one knows who understood which portions of the spoken message; so clarification, correction, and enforcement of learning are virtually impossible. What's more, for practical purposes, a one-time stage dramatization or film has exactly the same limitations and shortcomings as the lectern address for which it is substituted.

In attempting to provide some semblance of a two-way flow of conversation, speakers often turn to audience participation. While some success is possible on minor points, generally the speaker is fooling himself if he believes he can take any valid measurements of audience achievement from his lectern. In general, audience-wide participation is essentially entertainment, a la Johnny Carson, because:

- People are shy, and only the stronger personalities will perform for a group of peers, much less their company superiors. Thus the sequence is inhibited from the start.

- If any one person is singled out, only one question is answered, because few speakers care to exhaust all the variations on that question before proceeding.

- If the audience chants a response to depersonalize the quiz, the errors are drowned out by the chorus; errors learned here create relearning problems later.

One institution that has unwittingly proved the shortcomings of the lectern in a group learning situation is the New School for Social Research in Manhattan. To demonstrate that a foreign language is not forbidding, the New School created a crash introductory course intended to be a crowd convincer. In a two-hour session on each of three days, about 300 people are exposed to the rudiments of their selected language. Audience participation—parroting the instructor—is the format. Slides, music, handouts, role-playing, and sound and lighting equipment all make the introduction a mini-spectacular. If commercially produced, it would cost about \$60,000 and would generate about the same results.

As a selling device, the crash course is a huge success. A lot of people are merrily signing up for a formal classroom course. As a teaching device, the introduction is a flop—a discredit to the school were it not billed as an experiment. Tape recorders in the audience proved that individuals re-

peatedly returned incorrect responses, even when the instructor reiterated his material.

A similar situation in a sales meeting could be a disaster, with salesmen being compelled to perform in the field on the basis of faulty instruction. To obtain good field sales results with complex meeting material, meeting planners can:

- Prevent speakers from attempting to teach involved concepts from the lectern. Teaching belongs in the workshop which follows the address (SM, Oct. 2).

- Prepare a complementary study course based on an advance outline if an outside speaker insists on doing it his way.

- If an advance outline is refused, tape the address and immediately evaluate the message. Then present a restructured, complete review version to the same audience, preferably during the same meeting but definitely within a week.

- Refuse to accept as valid instruction any participation which does not permit each person to respond each time on record. That could mean creating a formal training course on the same topic if a specific performance standard is needed.

- Use the superficial achievement aspects of participation to demonstrate to the crowd that the material is easier to master than they expect.

The New School experiment demonstrates beyond argument that an impressive format and enjoyable audience participation sequences are no substitute for a complete program in a teaching/learning situation. We can all profit from *that* lesson. ■

## SELECTING THE TOOLS

### III-B

The type of tools to be used is a decision which virtually makes itself based on prior decisions:

- The objective of the meeting;
- The means by which achievement will be measured;
- The complexity of the individual topic;
- The "take home" requirements for training material;
- The time available for practice and rehearsal during the meeting.

Naturally the skill of the speaker as a speaker and as an authority has a direct bearing on packaging, although not within the direct area of your decisions on tools. You can decide, however, whether and to what extent to indulge his preference for specific presentation methods or minor tools. In small groups, the speaker's choice of design sketches, photographs, or (slides of) maquettes can prevail; in large meetings, the group needs are the overriding consideration.

All the tools mentioned in the article following are self-explanatory with the possible exception of psychodrama and sociodrama. The key distinction between the latter pair is in who benefits — the enactors or their audience. In psychodrama, the therapeutic progression from role-playing, the problem attack situation is usually unrehearsed, and the participants really project themselves into new roles, actually suffering the inter-personal conflicts; the audience observes, learning vicariously. In the sociodrama, the actors (probably rehearsed) are not emotionally involved but attempt to involve the audience emotionally. The audience feels. Catharsis and new understanding of others is the goal of both.

As with anything which enjoys ready acceptance, the quacks have moved in on these forms. NEVER stage a psychodrama without a trained psychologist in the room; and it's wise to have a psychologist check the premise of your sociodramas in advance of the first performance.

When dealing with the psychological balance of human beings, business has no right to experiment or err.



## **SALES MEETINGS FIVE YEARS BEHIND. SUPPLIERS OF MEETING, CONVENTION INDUSTRY FAILING THEIR MARKET; KEY IS ADULT EDUCATION, NOT DOG & PONY SHOWS.**

by Richard Cavalier

Meeting and convention industry suppliers are failing their market. Just as the American railroad failed to realize its market potential because it chose to see itself in the railroad business rather than the transportation business, so most convention suppliers see themselves in the meetings business (some in the dog-and-pony-show business) rather than in the adult education business.

They are already five years behind identified needs. And you are being forced to buy from them.

Selling is fundamentally the process of "educating" a prospect/customer in the features, advantages and benefits or products and services. In order to learn how to "teach" customers, meeting participants (marketing and sales chiefs and Indians) must be given certain advantages:

An authority from whom to learn (speaker);

A direction (agenda, lesson plan, or specific assignment); and

Tools to do the job outlined.

On a sales call, the original audience becomes the authority for its customer audience and recreates pertinent parts of the original meeting. In that sense, the salesman has become a teacher.

The tools he needs might be training pieces in hand and/or new advertising and/or sales promotion programs directed through him to the retailer or customer. But he cannot do his job without tools.

Tools are tangible (or otherwise sensible) implements which themselves make possible a direct action by the learner (audience) upon a material or a concept, such as a problem. Tools, therefore, have intrinsic value to the message.

Tools might tell how-to or describe (size, shape, usage, etc.) or verbalize or demonstrate a product's features, advantages, and benefits, which are themselves often intangible and insensate.

The extent to which a book is a medium to the message it contains is more philosophical than practical in the "tools" context, since printed words are symbol images.

Basic learning tools include these; pro and con:

Products and real objects: highest credibility factor of any presentation technique; but items are often too small to be seen from a distance, and benefits can be insensate.

Charts, drawings, chalkboards: when generated during the meeting, they lend immediacy and flexibility;

but are difficult to see from a distance. When prepared in advance they are images of a progression in thought, and so static, in the sense of photographs.

Photographs: substitutes for products and real objects when the product is too impractical in size or cost to distribute in the audience. Static exhibits are 3-D photos; but both are less credible than reality.

Books, booklets, outlines, tape recordings: orderly presentation of pre-selected factual information and opinions are complete; but lack immediacy and are difficult to distribute and control in a large audience.

Demonstrations and sociodramas, and exhibits if they contain one of the other two: highly convincing when performed live as a form of vicarious practice; but need generous lead time and are subject to human error.

Role playing: unmatched for creating participant insight into other people — sometimes called psychodrama; but must be supervised by a trained leader in relatively small groups. Explosive, unpredictable, powerful tool.

Projected images of any of the above (except role playing) on a screen. Great for magnifying small tools, products, or visible details and for giving the speaker control over reading rates of his audience; but one step removed from the conviction level of the tool for which it is a substitute.

ALL THE ABOVE tools have intrinsic value of either a permanent or intermittent nature. By contrast, visual aids — the equipment which contains or projects the tool images — are incident mechanisms. They possess no intrinsic value to the message, and their educational value lies solely in their ability to project the image of a tool. Any other use is packaging or entertainment, depending on the skill with which it is used.

Suppliers of visual aids and the producers who oversell them are dominating the convention and meeting industry because these high price, high profit operations can buy attention with advertising.

The new word for visual aids is "media," which sounds more impressive and costs more.

Visual aids/media are entitled to exactly that celebration accorded the printing press which produces the book or the grinder which sharpens the pencil.

The term visual aids is taboo among

the maxi-media people because it points up the embarrassing fact that since the invention of the practical film-projector combination, that group has offered absolutely nothing more to the quality of educational formats.

Changes in equipment have been technological and therefore competitive among manufacturers. The value of technological changes to meeting planners is incidental — related, through viewing comfort, to packaging.

True educational advances in the lens media have come through closed circuit television (immediacy and conviction of witnessing things live) and videotape recording (the learner can critique himself). Electronic video recording (EVR), developed by Columbia Broadcasting System and available in September, can substantially alter formats for meetings and adult education through sight-sound cartridges played at home on the family tv set.

Still it is the projected image — not the medium — which is the tool!

Videotape and EVR are representative of the kinds of legitimate change — progress — for which meeting planners and industrial trainers are eager. Resistance to such legitimate change is the mark of the incompetent. The championing of any mere technological change for the sake of change or artificial newness is the mark of the amateur, who might be incompetent for that reason.

WITH progress in the newer media, trainers and meeting planners can give new attention to the classic learning concepts of practice and repetition. Educators agree that learning has occurred when the learner can produce the desired response correctly three times in succession. Overlearning — repetition of the correct response already learned — lengthens the memory span for the information or skill learned.

By these education criteria, it is evident that a significant part of the learning process must take place after the man leaves the meeting room. Therefore the basic tools which he requires must be considered an integral part of the meeting.

This is not to say that budgets must be raised. When meeting planners stop trying to accomplish with splashier maxi-media shows what can only be accomplished with basic training tools and auxiliary advertising and sales promotion, they might find costs sharply reduced. ■

August 1970

## DISCRETIONARY SPENDING

### III-C

No matter how objective you hope to be about assigning money to various individuals and projects, your very concern for the cohesion of the program as an entity will make a number of subjective decisions both necessary and justified. *Give each speaker (within the confines of the budget) the sum of money he will require to do the basic job as you understand it.* If your original budget projection does not reserve funds (or a specific percentage of all funds) for your own discretionary use, you'll be at the mercy of all the speakers . . . their skills and tastes.

But if you have discretionary funds earmarked, you have the opportunity to package in such a way as serves your purposes. For instance, once the basic requirements of any speaker are provided for, you can decide whether his talk is so interesting as either to deserve or not need further support. Then you can decide whether a relatively unskilled speaker needs some kind of help — such as more expensive tools or more complex workshop procedures, programs, or follow-up. Could a small but bright demonstration pick up a slow segment? And will \$200 spent on thematic slides lend a pleasing continuity to otherwise rough transitions between sequences? That's all packaging.

Depend on your own interpretation of relative values, because few speakers ever believe that they have been given adequate funds. Even *adequate* is relative, and it will proceed directly from your understanding of the import of the message and the objectives to be gained through various means.

As an example, consider slides, the basic visual form with which almost everyone begins his thinking these days. All visual material is easily separated into:

a) those study plates which relate directly to spoken passages and are essential as study material — especially statistics and formulae;

b) the group of conceptual devices which express relationships — schematics or allusions; and

c) the cosmetic group — illustrations of minor points or merely neutral views injecting filler-type material into the program to avoid visual lapses on the screen.

By definition, the first group is required; the second is highly desirable; and the third category is superficial and highly expendable in terms of learning concepts. Yet it is exactly this packaging group which gets the attention in the maxi-media show. Slides used for effect are valid when effect is valid — but they are no substitute for content and cannot — through the touted curiosity value — express meanings and

create a psychological relief sufficient to slow the fatigue point of the audience. In other words, when you have the opportunity, intersperse light, easy-to-follow segments with the bone-crushers.

#### LARGE GROUPS:

On general principle, start out the large groups with something big and fast and gutsy – make them understand that this program matters. If possible, scatter to workshop rooms – otherwise consolidate into one move. Finish the morning with controversial topics which can be argued over the luncheon table (giving you a quick reading on response). Panels and audience participation are bright starters for the first session after lunch . . . bright because a film in the dark will put a lot of full stomachs to sleep. Follow that by breaking the crowd into small groups and barrel into the workshop practice and rehearsal sessions, with competent demonstrators and supervisors. Now test – so you know what has been accomplished (many insist on using pre-tests as well as post-tests, unless all material is new). Give a continuing assignment, and wave goodbye. Follow-up exactly as planned.

#### SMALL GROUPS:

Small groups respond to the same pacing pattern, but the main difference is that the small group workshop pattern permits the practice and rehearsal sessions to be spaced throughout the program, directly following the authoritative presentation to which each applies.

It is the *placement* of the practice and rehearsal sessions – NOT the fact of their inclusion in the program – which differentiates the large group meetings (hundreds or thousands of participants) from the small group workshop sessions (multiples of the basic eight participants).

Elimination of the practice sessions is the single greatest fault of all solution-delivering meetings which fall short of expectations. Size of audience is immaterial, although it's everyone's excuse for taking the maxi-media route. Without a practice session, you cannot have a meaningful test of what was accomplished. Without a test, you must accept the theatrical producer's word that the applause means you achieved some nebulous goal. *Substitution of the measure of entertainment feedback – applause – for the psychological measure of feedback – understanding and change – is the root of all the abuses perpetrated against meeting managers!*

With internal staff, confusions produced by a maxi-media show are generally blamed on the audience itself, for "not paying attention." A man who knows when he has *not* learned something is in reality a very bright man: he knows what he doesn't know!

Order-taking at a dealer version of a maxi-media show relegates the orders to the emotional status of applause; there is no proof that the

## THE WORKING AGENDA III-F

In distinct steps up to this point, you have evaluated the message, created the Preliminary Agenda, selected speakers and tools, and paced the entire program. As a result, you are now ready to transcribe the Working Agenda.

If you have weighed the topics for their synergistic effect on each other, then creating the Working Agenda is essentially a matter of selecting the prime topic and speaker from the paced program and giving it a clock time for beginning and ending; following with the best-balanced second topic and its clock time. As a matter of form, list the speaker's name with the topic to permit reviewers to share your concept of the pacing.

The Working Agenda is circulated with the preliminary announcements of the program – or can be forwarded to top management for approval, if required. (See “Meeting Justification Guide,” Section II-F).

If you have been honest with yourself in drawing up the preliminary forms, then your working agenda has been dictated by the stated objectives – it's a solid agenda. If the duration is no longer than needed, it's fast, or well-paced. Intrinsic rhythm tells you precisely where the high and low points are.

Never try to blunt the highs or bolster the lows at this point because a wave pattern is both normal and desirable for psychological relief. Office politics? Don't bother. (See “Working Agenda,” following.)

"Achieving Objectives In Meetings"

**WORKING AGENDA**

(Solution-Delivering Meeting)

Message:

1. Purpose of the meeting: \_\_\_\_\_

2. Who will attend: \_\_\_\_\_ 3. [Centralized] [Decentralized]

4. Date(s): \_\_\_\_\_ 5. Location(s): \_\_\_\_\_

6. Synergistic scheduling of topics—

PROGRAM—Day One

Topic*	Speaker/Authority	Clock Time	Cost of Tools
a) _____	_____	_____	\$ _____
b) _____	_____	_____	_____
c) _____	_____	_____	_____
COFFEE BREAK			
d) _____	_____	_____	_____
e) _____	_____	_____	_____
LUNCH			
f) _____	_____	_____	_____
g) _____	_____	_____	_____
h) _____	_____	_____	_____

PROGRAM—Day Two

etc.

*\*NOTE: Treat training sequences as a "topic" and describe below if necessary.*

7. Policies, methods, and skills to be changed as a result of this meeting:

8. Future meetings (programs) to result:

# IV

## Coordination and Control

2. 2. 2. 2. 2. 2.  
3. 3. 3. 3. 3. 3.  
4. 4. 4. 4. 4. 4.

## SHARING THE WORKLOAD

### IV-A

One man cannot be expected to coordinate and produce a meeting alone. Yet someone must have an absolute understanding of the meeting concept during the entire period from initial idea until the wrap-up after the meeting or convention ends. Arbitrarily we have designated that man the *meeting manager*. He can be a supervisor exclusively, or he can actually participate in the three major functions: planning, coordinating, and producing. He could be an outsider.

But except for minor solution-seeking meetings, even he must offer his company, or association, the security of a back-up man, and he must accept the assistance and counsel of others in the matter of details. Critical decisions should already have been made – and these are, in any case, not to be assigned to a committee.

The article immediately following outlines twelve major areas that require attention, although not all of the twelve will necessarily apply to every meeting.

With your working agenda in hand (See Section III), count the number of scheduled hours – that number converts directly into the number of man-weeks of time required to coordinate that program. Given the calendar time available and given their previous job commitments, how many men are needed to deliver *at least* the stated number of man-weeks of time?

For instance, a seven-hour meeting will require seven work-weeks of somebody's time, which can be shared; if only three calendar weeks remain until the meeting, at least three men must work nearly full-time (3 men x 3 weeks) to execute it! If those men cannot devote full time, then increase the number of men assigned. As the number of men increases, so does time-loss as a result of duplicated effort and interim conferences.

If only four men, for example, will share the responsibility for all twelve coordination categories, group the responsibilities logically. One man will find speakers and their needs and their rehearsals (two categories) a full, logically-related assignment; another man can easily handle menus, local transport, room registrations and welcoming, and women's programs (four categories).

## MEETING PLANNING IS NOT A ONE-MAN JOB

by Richard Cavalier

After you've decided whether the meeting/convention you're calling is informational or instructional, and after you've prepared a tentative agenda, it's time for you the planner to coordinate and produce the meeting/convention components — or to find someone to do it.

The meeting planner sets the general outlines: a particular selection of people at a given time for a specific purpose. The coordinator develops detailed plans and takes administrative control of everything; the producer makes it happen as planned, getting people and things to the right place on time.

Only rarely can one man perform all three functions for a major event. Wherever the responsibility is fixed, there must be a cross-functional, cross-line authority for decision-making; major meetings and conventions are too complex and expensive to allow interference by office politics.

For clarity, a meeting is defined as any gathering with an agenda, whether or not in front of the lectern; and convention as all events and functions including and surrounding the meetings.

What's involved in coordination? Countless things in different combinations each time; but these categories of detail are indispensable:

1. Personal inspection of potential facilities (hotel, motel, hall, or auditorium) before signing any contracts. Lists and diagrams are always out of date; and since availability — not physical existence — is the key factor, it's wise to phone the convention bureau (or in a small town, the chamber of commerce) to determine what's available on your dates and whether other activities already scheduled might conflict with your needs and plans.

2. Contracts for selected facilities. Promises, promises — but some facilities won't give you the time of day if it's not stipulated in the contract. What's free with the contract and what's chargeable? Get all public space commitments in writing by room name or number and never give up your meeting room to another group after you once move in!

3. Working agenda and diagrams in writing. Send copies through the facility's convention manager to each department head and require written response. Never make a positive assumption on a no-reply basis. ("If I don't hear from you . . .") Nobody reads those letters.

4. Budgets. No one can afford much of what suppliers can suggest. Advance budget estimates help to say *yes*, *no* or *maybe* more intelligently — and set priorities.

5. Supervision of production. Learning tools and related equipment, exhibits and displays, and publicity — a whole new topic but part of the basic coordination responsibility.

6. Local help. You're always wrong in a dispute. The New York projectionists union is a problem because some of its members are incompetent with anything but movies; in Miami Beach, brothers-in-law hold the hotel equipment concessions and don't need ability; in Los Angeles, projection equipment is a problem; in San Francisco, the musicians union makes preposterous demands on minimums for cocktail and incidental music. Know what you're getting into and be prepared to adjust or do without.

7. Speakers and their support equipment. No two persons request exactly the same microphones, lecterns, stage properties or projectors. Best to tell them flatly what you can or will provide and ask for a written approval or a list of their unavoidable variations.

8. Menus, entertainment, hospitality for vip's. The little things alone won't make a convention, but they sure can help to break one if left undone.

9. Local transportation. What's the taxi bill between airport and hotel? Hotel and downtown? Most of these incidentals will end up on company expense accounts; so providing a paid shuttle bus might save money in the long run.

10. Pre-registered sleeping rooms, registration kits or name tags. Make everyone feel special on arrival — it helps turn them on while eliminating interminable lines.

11. Rehearsals. Conduct them in the meeting room itself, if possible. Allow

at least a 3:1 time ratio and stagger the appointments of key speakers to avoid wasting their time. Even the chairman of the board needs time here.

12. Programs for wives. Keep them occupied, or they'll nag the men. Keep them happy, and they'll order the men to be happy. Most would like to learn something about the business their husbands refuse to talk about at home. METICULOUS coordinating protects your meeting objective — be generous with the time allotted. Given all the coordination responsibilities, you probably cannot save significant amounts of time against these estimates:

For the simplest of opinion interchange meetings, at least a 1:1 time ratio in advance to collect your thoughts after the agenda has been made up.

For talks and demonstrations, at least a 3:1 time ratio. No matter how well you know the material, speak it at least once aloud in advance — it rarely times out exactly as estimated. Get speech outlines from everyone.

For major meetings and conventions, allow about one week's time for each hour of scheduled program; somewhat more if coordinating responsibilities are shared.

At least one month's lead time for each day of the convention when confirming specific details with the facility. Major associations are now booking five years in advance. In self-defense, companies must begin to schedule by the calendar rather than the clock.

For safety, at least one other man should understand the master coordination plan, whether or not he helps to create it. Obviously meeting coordination is a pain — so who needs it?

You do!

October 1970



"Achieving Objectives In Meetings"  
**COMMITTEE COORDINATOR**

Message (or Program title): \_\_\_\_\_

Date(s): \_\_\_\_\_ Location(s): \_\_\_\_\_

Scheduled Program Hours: \_\_\_\_\_ Weeks Remaining: \_\_\_\_\_

Meeting Manager: \_\_\_\_\_

Assistant Meeting Manager: \_\_\_\_\_

**SUB-COMMITTEES**

Needed? (check)	Responsibilities	Chairman & Committeemen:	Coordinating time in weeks:
1. ___	Personal inspection of facilities	_____	_____
2. ___	Contracts with facilities	_____	_____
3. ___	Working Agenda & diagrams	_____	_____
4. ___	Budgets	_____	_____
5. ___	Production (non-speaker)	_____	_____
6. ___	Local Help	_____	_____
7. ___	Speakers & support equipment	_____	_____
8. ___	Menus	_____	_____
9. ___	Transportation	_____	_____
10. ___	Welcoming & registration	_____	_____
11. ___	Rehearsals	_____	_____
12. ___	Wives' programs	_____	_____

**TOTAL:**

*NOTE: Total estimated time in weeks must at least equal the scheduled program hours.*

**TO DO IN FIRST MEETING:**

- a) Group think: (See Section IV-B.) Provide copies of pertinent justifications: "Message Profile, Audience Profile," etc.
- b) Outline all work completed to date and expected next steps.
- c) Ask for immediate questions and comments on responsibilities or apparent improvements, etc.
- d) Schedule additional meetings *by committee*. (See Section IV-C.)
- e) Establish the fact of periodic reporting memos and schedules.
- f) Avoid discussing sub-committee problems with full committee!

## CATEGORICAL CAUTIONS – FULL COMMITTEE IV-B

Industry publications are perennially printing checklists and hotel directories – usually with a great flourish. The flourish is required so that you can be conned into believing you've just been given something of value. When your committee asks for checklists – and they will – here's the scoop:

Checklists and directories are like candy cotton – you know, the fluff sold at carnivals. One can take a huge mouthful, but it instantly melts into a few drops of flavored sugar.

Lists are popular with magazine editors because they fill a lot of space and therefore look impressive; better, they're also extremely cheap – probably free – to obtain because lists are essentially publicity handouts. Miles of lists create special sections which generate advertising revenue. Good for the publisher. Good for the advertiser and public relations agents – maybe. Not so good for you.

Checklists deal in bogus substance. While checklists do have an appeal for novices, they have a number of severe drawbacks:

a) Trying to be all things to all people, they serve no one well. A general checklist reflects no agenda, no facility, and no timetable. Speed of lighting changes, for instance, can overwhelm the lighting controls which might otherwise have passed the “checklist” checkoff with sparks to spare.

b) Checklists tend to lull their users into a false sense of security. By their nature, the checklists imply that something can be “finished,” whereas in reality, nothing is ever finished until delivered in the meeting. “Complete to date” is the most you can hope for.

c) By being available at all, the standardized checklist becomes a crutch, and it permits a novice meeting manager to believe that he can function by checking off squares rather than by *understanding* every single element of his program as it's added to his program!

Control is achieved only by understanding, and that understanding is achieved only by reasoning back from the final desired effect through all the interim indispensable steps *in reverse sequence*.

### PERT AND CRITICAL PATH ANALYSIS

The logic of reasoning out all the indispensable steps in reverse sequence is a common sense approach that was formalized and codified in 1958 by consultants and suppliers working with the U. S. Navy on development of the Polaris System. By 1966, nearly a hundred variants had been identified.

The original was called “Problem Evaluation and Review Technique” (PERT), and it treated its planned resources and objectives

coordination category of the meeting or convention. There's no shortcut, although speed comes with experience.

Most important, all committeemen must be aware that absolutely nothing is ever beyond crisis until it's past history.

But checklists? Have some more candy cotton, fella!

(See "PERT Committee Guide," following, and "Convention Control PERT Diagram," Section IV-E.)

"Achieving Objectives In Meetings"  
**PERT COMMITTEE GUIDE & REPORT**  
 (Make one for each facet of each of 12 categories)

Message (or Meeting Title): \_\_\_\_\_ Date(s): \_\_\_\_\_  
 Committee Function title: \_\_\_\_\_  
 Chairman: \_\_\_\_\_ Staff: \_\_\_\_\_

1. Responsibilities:

2. Description of key end-service or product:

Calendar time available: \_\_\_\_\_ WEEKS\*

3. Indispensable prior steps which must be completed, in reverse (dependency) order:

Step:	Elapsed Time in Days			Calendar Safe Target
	Best	Worst	Probable	
a) _____	_____	_____	_____	_____
b) _____	_____	_____	_____	_____
c) _____	_____	_____	_____	_____
d) _____	_____	_____	_____	_____
e) _____	_____	_____	_____	_____
f) _____	_____	_____	_____	_____
g) _____	_____	_____	_____	_____

TOTAL TIME REQUIRED: \_\_\_\_\_ WEEKS\*

4. \*Bottlenecks or apparent need for rush work:

5. Initial Budget Estimate: \$\_\_\_\_\_. Probable Final Cost: \$\_\_\_\_\_.

PERT represents timed logic — any illogical sequences indicate potential problems. If any step in Item (3) above requires a complex feeder service or goods, construct a separate sub-path on a duplicate form and cross-reference via Item (2). Once completed, the Guide can be photocopied each report day. Each committee chairman can initial his report and circle with red pencil the appropriate step then in progress. Applying management-by-exception criteria, request that only *problems* and *all problems* be commented upon in a brief covering memo.

## GUIDELINES FOR INDIVIDUAL COMMITTEES

### IV-C

#### 1. Selection and Inspection of Facilities:

It's almost impossible to be too careful about the facilities selected for a meeting. Whether an all-in-one convention center or a combination of hotel-motel plus independent auditorium or theatre, the facilities themselves have a bearing on the program.

In scientific terms, the hotel/motel and hall become a major part of the "surround," everything in the man's conscious and unconscious awareness of place and attitude *except people*. The facilities must say you respect him, without mocking a silly salary level. Hotels should not look to be the cheapest, even if they are. Use the smallest suitable facility so that your group is important to their management. Service capability and cooperation of staff count for more than national trade name.

For brief or very large meetings, the city facility often wins. For personal contact and enough solitude to encourage serious study and discussions, the hidden-away resort wins hands down. For a reward or holiday spirit, the ski or sun resort. Some are cautious about Las Vegas, New York City, and San Francisco, contending that there's so much to do that not only do the men stay up nights, but they also spend more money unintentionally than the family budget will stand. Family budget problems lead ultimately to new job interviews.

Pre-selecting potential sites occasionally can be a headache. Lists are of little value, since even the Yellow Pages tell you every hotel in a given city — and so what? What's important is the *current availability* of a facility that has the capacity and equipment you need. Period.

The best place to get up-to-date information of such a scope is from the convention bureau of the city selected (or cities contemplated). For small towns, see the Chamber of Commerce. These bureaus know from day to day which conventions are already booked in town, and which hotels have them. The convention bureau plays no favorites and will tell you every facility which has the capacity and the open dates you seek. There is none of the bias and public-relations favoritism

panel board is occasionally inoperative — or limping along on a few of many apparent circuits. And although a knock-out switch can control room lights from a remote location, it's an all-or-nothing device.

For space: if you need it, measure it. For equipment: if you need it, test it. You take any facility "as is" unless there's a provision in the contract for variations or improvements. Find as many of the problems as possible before you sign . . . there'll be fewer when the meeting is in progress.

The on-site shopping for a facility is the business version of a ritual courting dance. If you arrive at the hotel or motel as a prospective buyer then you are greeted with light banter at the check-in desk; given the best room (or suite) in the house, usually complimentary; find the telephone operator answering almost before you pick up; swear a bellhop has been stationed outside your door; and get unbelievable room service — all before you meet the hotel's convention manager. He waves off your profuse thanks, of course, because you got nothing more than "regular service." Once in a while, that's almost true.

If you really want to know how your people will be treated, check in without fanfare, ask for a minimum or modest cost room, and start taking notes. All you suffer is the loss of free liquor or fruit basket. When and if you're satisfied with the service and overall appearance of the facility, phone the hotel convention office — they'll probably find time to see you. If you don't like what you see, you've just saved yourself the embarrassment of breaking the sad news — besides saving yourself from a possibly wretched convention atmosphere. If you have no choice but to use the unhappy facility, you are armed in advance with specific complaints which can be taken up with the convention manager. Write the corrective measures into the contract.

When engaging any hotel or motel, keep in mind the old tourist refrain: "It's a nice place to visit, but I wouldn't want to live there" — even for a week? That can be a long time.

Negotiations really can't be begun until you have toured all needed physical space, checked all available equipment, and talked with all personnel with whom you will have direct contact. The amount and cost of equipment and labor which must be brought into the facility directly affects the amount you will be willing to pay for the rooms. For marginal meeting facilities, pay only the lowest prices or go elsewhere. Again, using a nearby movie theatre or cabaret can give you ready-made auditoria usually far superior to anything available in a hotel except possibly at great cost.

When inspecting the physical plant, make a habit of seeing the Big Three of the labor force immediately — the electrician/soundman; carpenter; head houseman. Spend a few minutes with each man and tell him what your current (or previous) programs are like. Does he

and adequate? How far to the meeting room? How far to the restrooms from there? Are public telephones nearby? Can coffee be brought in *quietly*, or is the kitchen bedlam right next door? When you break for lunch, is the restaurant a half-day's walk? Will that blow the schedule? Should you then switch to sandwiches or buffet served in the meeting room? Can that be done without kitchen sounds? Can you move between exhibits and meeting rooms without losing men in TV lounges or bars? This, too, is PERT reasoning.

All these considerations are stated as if you know the basic requirements of your program in advance of selecting the facilities – the ideal situation. But in practice, facilities must be booked long in advance. Don't panic – just review the actual specifications of 3-5 years preceding for similar events. Take the *maximum* specifications of every category to be your *minimum* for this inspection trip and note all fuzzy areas. Probably never will your actual needs prove later to be impossible to adjust to existing conditions, if only because you can plan your meeting support materials with your contracted limitations in mind. Almost foolproof if you take the time.

If the physical plant and personnel pass all these tests, then you have found an outstanding meeting site. Assuming your food was acceptable, it's time to commit informally: to block. In blocking, the convention manager pencils your sleeping rooms and function room requirements and dates into his control book. Be certain to reserve advance set-up time. (See Section V.)

If the facility is only marginal, and if you have other facilities to see, admit it; the hotel will give you a grace period in which to contract – and might shave prices a bit to meet legitimate competition. Price cuts do not make up for service deficiencies, but they count in a toss-up between essentially-equal sites.

At the “yes” or “maybe” point, relate to the facility's convention manager all your intentions and expectations regarding performance (on both sides) and stipulate the kind of contract you intend to sign (refer to Section V). If he balks, maybe he knows something you should know.

And if everything goes right through this point, maybe you'd better consider blocking now for the next year, too! The perfectly appropriate facility just isn't that common. You can agree to sign for the second meeting immediately upon completion of the first. That's a security blanket for all . . . and the probable start of a long alliance with a facility that deserves your business because it works to keep it.

## 2. Contracts for Facilities:

(Refer to Section V for a complete discussion.)

disbursements should go on the committeeman's own room tab, not the master account.

Overtime blows budgets. Unless it's dictated by the PERT analysis for the function, don't authorize it.

#### 5. Production of (Non-Speaker) Materials:

The production responsibility is essentially input/output supervision of suppliers. The only possible way to cope with the details and dovetailing of procedures is through PERT for every type of item which will be ordered. Then plot all interim due dates on a master chart – or, if that's not your style, have your secretary establish a special calendar and enter the target completion status checkpoint for every item between now and the due date. Refer to that calendar daily and investigate EVERY discrepancy between target and actuality.

Staff artists or an outside sales promotion or ad agency might prepare the announcements and flyers, but for control the work should be supervised by the production committee – and subjected to the same type of PERT schedule.

Although printing costs are mostly mechanical and predictable, the things printed (as well as art for slides) will be mostly creative work billed at high rates. Creativity cannot be hurried, although the mechanical work surrounding it might be. So to rush a creative job, more people must work on it – blurring viewpoint and causing style lapses, if not worse. Overtime is costly and wasteful of talent and money; yet most budgets which are blown suffer at some point from this problem. Generally it stems from not honoring the PERT deadlines. If a speaker goofs on the writing of his script, simplify his spoken and support material. That's not always the most popular of solutions, but it works every time.

If a PERT Guide is made for every significant project, then a written description of each job can be given to each supplier. It helps to prevent inflated bills, which can be expected whenever there's too much flexibility in the specifications of a given job.

Some hotels have never ceased to offend. Not only are there charges which various and sundry persons neglected to mention (voluntarily) prior to contract, but also the offending hotels – through error or intent – manage to schedule to your disadvantage. In such cases, you will often be told that the hotel will pick up the cost of its own overtime rate. Gently they slide by the problem of what to do about union projectionists or stage hands on your payroll. If the hotel is to blame, deduct the costs from their final statement. And if a convention manager offers to pick up those charges, then accept them as simple damages due – not gratefully as a compensation for the problems caused. There is no compensation possible for unnecessary



sound, unskilled projectionist, etc. In such cases, all they need is adequate early warning.

Unless a talk is fully scripted and acceptable as it stands, prepare a PERT Guide for each speaker, working in collaboration with him so that he feels committed to its dates. Then hold him to the checkpoints and dates. When presentations are being written from scratch, ask for an outline before the first draft – to keep the writer from being carried away by the sound of words. Then review the first draft before approving the start of photography or artwork. Given such uncomplicated checks, production is seldom complicated.

The only problem among speakers is in protecting the message they are expected to deliver from the abuses of pride, *artistes*, and maxi-media producers. Basic production is a cinch after that!

As a positive safety factor, keep a ringbinder in hand with a copy (or outline) of every message to be presented. Follow the proceedings closely, and if a hitch develops at any point, you will know precisely where you are and where the program must go to initiate Plan “B.”

#### 8. Menus, Entertainment, and VIP's:

Every catering manager in the world has had his days at the kitchen stove, and many of them are proud that they can still whip up a mean soufflé. So although the hotel is prepared to hand you suggested menus – often the printed menus of other groups – the catering manager will be flattered if you ask him to try to do something unusual within your price range.

Keep two things in mind: first, the exact per-person price is somewhat negotiable, even open to a horse trade of, say, eliminating soup in favor of a fancier dessert; and second, the catering office is part of the total convention profit center, and the prices will reflect the number of “free” meeting rooms you ask for. *There's nothing for nothing in a hotel.*

The best way to fight what you feel are over-priced menus is to serve carved beef sandwiches and beer at lunch and threaten to turn the men loose on the town for dinner. The hotel doesn't want to lose the business and will compromise.

If you are meeting in a resort, entertainment is often part of the package; but you can augment at relatively low costs through the hotel. In remote areas, though, the quality of performer might leave something to be desired unless you're in a nationally-known facility. For major stage shows, refer to Section VIII.

VIP's can cause headaches unless you substitute attention and courtesies for superspectacular extras. What's right for your group is all that is necessary for them. Few are difficult unless nervous hosts lead them to believe they're being badly treated. Human nature is predictable despite titles.

Domestic airlines like resort groups, and some airlines offer genuine assistance. (See "Travel Industry Service Evaluator," Section VI.) Most resort-vicinity business is geared to the resort itself, and the hotel convention manager knows exactly which services are available and from whom. Visit with him.

#### 10. Welcoming Committee:

Why spend a lot of time and money to turn people on during the scheduled program while doing nothing at all a few hours before? A handshake and directions to where the gang is holed up will say more about what you think of them as individuals than will the greatest dog-and-pony show on earth.

If you haven't booked all or most of the facility, then create a spa in one of the function rooms you've reserved. Immediately upon arriving with a crowd, no one will bother with sports or the like; so if you guarantee the bartender's salary, they can gather informally, and the hotel won't really care how little liquor is served or sold. Coffee is on you, always.

Besides eliminating lines, pre-registration gives you a running tally on who has arrived, which gives you a line on the VIP's, who might be greeted with a basket of fruit or a liquor bottle in their room.

The welcoming venture takes only a draped table and somebody's secretary — or a temporary worker hired through the hotel. Key company execs and committee members are not expected to *work* — their job consists of being nice guys to everyone who arrives.

Airport welcoming is a mistake because of flight changes and delays; so pick-up service should be provided only to those who demand it. If the individual itinerary doesn't survive, most of the committee's airport time will be wasted.

What really matters is that the effects of a warm reception last throughout the meeting.

#### 11. Rehearsals:

Every amateur thinks he doesn't need a rehearsal; the pro demands one. Refusing a rehearsal is ego-tripping, of course, no matter how it might be rationalized. The most common excuses include, "I just gave the identical talk last week," and "I know the material like the back of my hand." Both types are uncertain enough about content or structure or personal delivery not to want to subject it to rehearsal scrutiny. They need rehearsals the most.

Keep the rehearsal room (THE meeting room is best) empty but for the speaker, his projectionist, and his personal assistants. The meeting manager, pertinent committeemen, and the local speech coach, if you're using one, are the only staff who are needed in the room. Send the curious to the movies.

is responsible for the suppliers of tools and services required by the assignment;

c) Submit a preliminary report on the viability of the tools, methods, and budgets originally estimated – in terms of the actual meeting facility if known;

d) Suggest necessary or preferred changes and outline any likely problems; decide on alternatives and follow them;

e) Describe in writing the final approach agreed upon for all speakers, goods, and services – using the PERT Guide;

f) Submit weekly (or other specified periodic) confirmation that the projects are progressing to specific stages with good quality on time – using the PERT Guide & Report.

g) Reconfirm – as soon as possible but not until after production is underway – the workability of each project from every standpoint, including hotel or hall limitations, as described in Item (e) above, with a list of all technical requirements for hall or hotel.

While the meeting manager can feel free to carry on any number of interim telephone or personal conferences with anyone involved in the meeting, these conferences must never be used to eliminate the committees' periodic PERT reports. Measurement by control memo helps keep committee members themselves – as well as the meeting manager – alert to project status at all times.

If a theatrical producer will be used to assist with the coordination of the business meetings (see Sections VII & VIII), then he can be called in for preliminary interviews about the time Item (c) above has been completed; and contracts can be let when the prospective producer (or other supplier) has agreed to the methods and schedules of Item (e) above.

If you have engaged a theatrical producer expect of him exactly the same type of interim reports as you require of your own committees – he is, after all, only another paid member of staff. And PERT control will make his service definable, understandable and therefore almost surely less expensive than before.

As soon as written confirmation of Item (g) above has been received from every committee, the meeting manager can create his Final Agenda – which by now will probably call for only minor alterations of the Working Agenda. Any such changes would have been made under Item (d) above and will surprise no one. Once the Final Agenda is determined, print it, distribute it, and live by it!

The meeting manager's copies of the PERT Guide & Report (see Section IV-B) belong in the manila folder of the coordination function to which each relates. Each interim report – Item (f) above – can be checked against the original PERT Guide, and any discrepancies can be noted and acted upon . . . excellent counterchecks.

heads just before the formal start of your program.

It is essential that the meeting manager — as the person with the most comprehensive view of the program — take charge of the liaison meeting. Introduce all company staff members, including your producer, if any; and ask the hotel convention manager to introduce his staff. Point out which of the committees will work with which of the department heads, although many will already know each other.

From this point on, each person on both sides is responsible for *all* his — and *only* his — areas of responsibility as covered in the contract and the Master Requirements Summary.

From the standpoint of efficiency, cover the least complex areas first — telephones, public restaurants, housekeeping — and release those supervisors immediately.

Electrician/soundman and carpenter and head houseman will work together throughout and will benefit from sitting through each other's discussions. Treat them as a team.

Don't belabor the requested service. Concentrate on the problem areas or possible misunderstanding of purpose — which can sometimes occur even when the goods or services can be provided. Discuss even slightly hazy areas, and don't waste time reiterating the things which are okay.

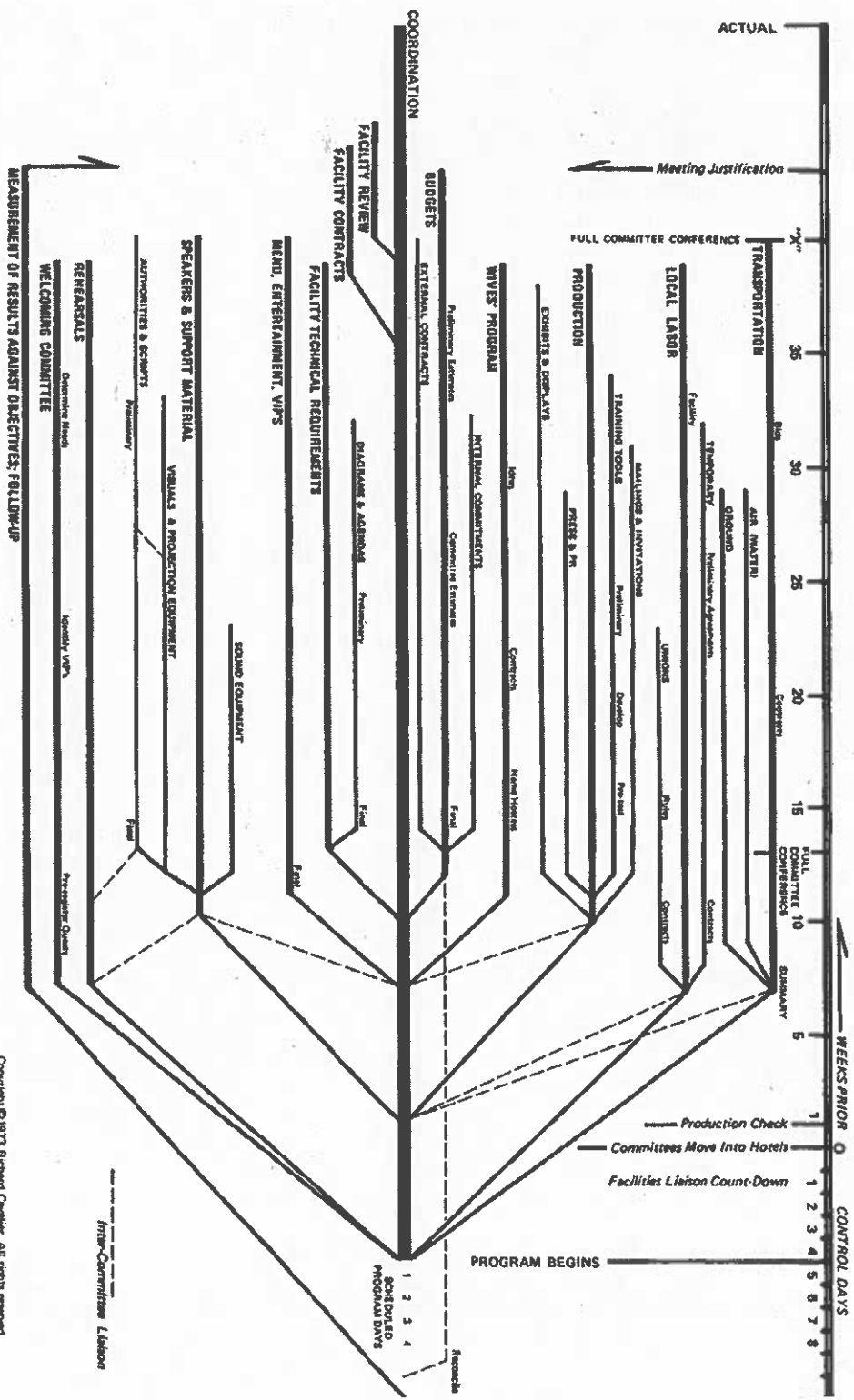
If everyone comes to the all-staff liaison meeting properly prepared — and there's little excuse not to — and if only exceptions and problems are discussed in detail, then an entire 3-5 day convention can be cleared with perfect understanding in only three hours' time.

You'll find that to be the most rewarding three-hour span you've spent on the entire coordination process!

"Achieving Objectives In Meetings"

# Meeting/Convention Control (PERT) Diagram

(Hypothetical Calendar: no attempt has been made to reflect actual time sequence in detail.)  
 To determine the calendar for your meeting, refer to the PERT Committee Guide & Report, Section 1/8. Enter key dates on appropriate function bar below.





Handling Hotels

## WOULD YOU BUY A USED CAR THERE?

### V-A

On those infrequent occasions when a hotelman concedes that hotels do indeed goof, the example is invariably represented as forgetting ashtrays or icewater — and we all agree that's not a catastrophe. The real problem is that few "honest errors" of the hotel are either honest or errors.

The three common and cardinal sins of any offending facility are these:

a) To sell a function room to another group to use prior to your contracted arrival date and time, after telling you the room would be unused and available free. Naturally the hotel had long ago dissuaded you from contracting for the extra hours or day prior (because they would have less profitably "given" it) assuring you at the same time that contract provision and protection was "unnecessary."

b) To sell a function room to another group after you have already moved into that room simply because you do not have a profit-producing function scheduled for that hour. Naturally the hotel has previously dissuaded you from demanding exclusive use of the room in your contract — that too was "unnecessary." All losses and all tear-down/re-set headaches are yours, even if the hotel labor is free.

c) To permit hotel staff — including the hotel's own convention manager — to walk away from problems . . . especially those which hotel policies or employees have created. Since most corrective measures seem to be "against policy" or "not in your contract," you'll get some sympathy and no help.

In self-defense, include in your contract a specific provision for every function room, critical service, and time/date. (For additional comments, see Sections IV-B and IV-C.)

In addition to those malpractices (fair comment because all are knowingly perpetrated) there are also problems normal in any business operation — personnel turnover. Personnel can quit at any time, and the chains add transfers to the hazard.

When a key hotel staff man leaves, you lose two things: all the private understandings for services and goods not already committed to

**HOW**

# **MEETINGS**

**HELP SALES**

## **No Need to Travel Far To Drive Your Point Home**

By RICHARD CAVALIER/Contributing Editor

**A**n anyone who holds sales meetings frequently knows that the spirit of the group often varies with the facility. Few realize, however, that the phenomenon has been described and measured as the psychological "surround," and it can have a profound impact on the participants.

The surround consists of all the elements affecting the meeting except the message and the people or interpersonal relationships. The rooms' amenities and general decor, service, location, recreational facilities, and food all have an impact on the participants' responses to your message. The influence of the surround is pervasive and complex.

And its warning is clear: pick your meeting facility with any eye toward what it can do to put your people in the right frame of mind to respond favorably to your message. Here are a few questions you can ask yourself before contracting for a meeting facility:

1. Does the accommodation have all the technical equipment and the variety of auditorium and workshop space required by the meeting plan?
2. Is the quality of the facility and food service at least equal to the standards that the salesmen are accustomed to at home and in their personal travel?
3. Is the urban facility so located as to encourage (or discourage) the group's exploring the central city?
4. If the remote or resort locale is selected because of its isolation, does it offer suitable activities and sports to prevent boredom over several days or longer?

5. If the meeting is in a highly desirable destination, can the hotel accommodate wives at their own expense?

6. Is service offered by the staff with an air of welcome rather than of tolerance or annoyance?

7. Can you occupy enough of the rooms to dominate the place and monopolize the hotel management's attention?

Experience has proven that young men and first-time visitors to any desirable location will explore the central city regardless of difficulty; so if a remote location is unavoidable, provide group transportation, which is ultimately less costly than the taxis padded into expense accounts. Of course, frequent travelers prefer the airport locales, even for a couple of days.

To escape phones, many sales executives these days request isolated locations for even relatively brief gatherings; and for periods of a week or more, as in the case of training programs, the resort is hard to beat. The size of the group is determined by the proximity of scheduled airline service, unless all can drive in easily.

In determining appropriate cost levels, the facility should reflect the company attitude toward both the men and the message. Don't tell them how important they are while lodging them second class. Don't tell them to cut costs while meeting in the top luxury facility of the area. (Incentive trips are a mandatory exception to the luxury rule, however.)

Never confuse quality and luxury—

the latter is based on personal service, which costs more than decor. Men who don't have domestic help at home rarely use the luxury service staff.

Hotels have been reluctant to admit that their failure to provide all goods and services exactly as contracted can result not only in simple customer irritation but in the crippling or destruction of the entire meeting. More meetings have been adversely affected by careless or incompetent hotel staff than by any other single element outside the meeting manager's direct control.

When he's evaluating a prospective hotel, therefore, the veteran meeting planner registers unannounced at the desk and makes his personal judgments before he can be overwhelmed by the VIP showcase ritual. Once he's made his choice, however, he spares no effort to play up the accommodations to the men who will attend the meeting, dropping in casual remarks about points of interest in the area and making suggestions about what clothes to wear. In short, he starts to collect on his investment in facilities right away.

Salesmen aren't dumb. If the message is honest and the surround is right, you'll find everyone alert, expectant, and cooperative at the meeting. Then watch it fly! **SM**

October 16, 1972



## THE WAY TO A MANAGER'S HURT IS THROUGH HIS WALLET

by Richard Cavalier

Write a fool-proof facilities contract, or you're in trouble!

All hotels misrepresent their capabilities to some degree for two main reasons: (1) To preserve their own competitive position among all other misrepresenting hotels, and (2) to protect themselves from those customers who either unwittingly overstate their needs or who knowingly misrepresent their group size to obtain price concessions. Poor Honest Joe gets clobbered.

The fact of misrepresentation is freely acknowledged in the hotel trade. It continues because certain hotel managements are interested in only the dollars generated and have no true concern with the quality of the convention service rendered by the hotel.

While the Pollyanna response to this is "Our customers won't return if we misrepresent," the truth is that until the last couple of years, there was more business available than the major hotels could handle. Although major hotels "competed" for prime accounts (large crowds of free-spending guests who made few demands on the technical facilities), the little guys waited hat-in-hand in the convention sales office to beg leftover dates. Many more meeting planners have been forced back into the scenes of earlier disasters by lack of reasonable alternative sites, and their return was interpreted by hotel management as tacit acceptance (almost endorsement) of the chaos, perpetuated by subjective measurements (if any at all) of a staff which includes incompetents.

It has been a long day's journey for meeting planners.

BUT THINGS are changing. Motels and smaller hotels are coming to dominate the little-guy market both at home and abroad, and major hotels are forced more and more to depend on business meetings. Suddenly hotels need you, and they're not sure how to deal with the change.

As a direct result, the hotel industry sponsored its first forum in Dallas last June. They've set another for this month. What is significant about the seminar is that it didn't occur until one full decade after hotel problems caused the emergence of the professional convention coordinator. His ba-

sic production responsibility (distinct from program development consulting) essentially is to ride herd on the hotel staff. The title will be made obsolete when hotels shoulder their responsibilities.

Privately, the hotel industry sales personnel say that little change will come of the seminar because top management of dominant operations refuse to invest in higher salaries for key service personnel (including front desk) or to underwrite small amounts of rental revenue lost from public space more loosely booked to permit major users to have more set-up time.

In those facilities, it is the customer who pays the union labor penalties caused by unrelated prior events, so why should hotel management be eager to change?

Where management operates a true convention facility, superior service results. For example, the Fountainbleau (Miami) president has a convention sales-service background; Bob Tisch (of Loews Hotels) personally checks out random function rooms, and his chain's service reflects his interest. Sheraton has in the past booked loosely, with generous set-up time usually available. Be aware, however, that local franchise operations vary widely.

IF YOU want to be in charge, then take charge:

1. Refuse to deal with hotel personnel who mistake arrogance for confidence born of ability. Find a man on a higher level who can give you straight answers. You get only one chance to produce a perfect program!

2. Inspect several potential sites. A small hotel and nearby movie theater create flexible alternatives. Select the smallest facility that offers both suitable atmosphere and adequate space and equipment.

3. Announce that all arrangements, including provisions for later specifications, will be committed to writing as a matter of initial contract. Agree to relinquish unneeded public space by a target date and to deliver in a comprehensive document several weeks prior to the convention a summary of all technical requirements, an addendum to contract.

4. Demand a single hotel coordinator through whom all correspondence will flow. Get to know that man. And forbid the hotel to train rookie salesmen by experimenting as service "assistants" on your program.

5. Open a separate manila file folder on each aspect of the program. Whenever you write a multiple-topic letter or receive a similar reply, drop a photocopy into every pertinent file folder. When each aspect is complete, transfer its entire folder to a shipping crate - it belongs at the meeting.

6. Not less than two weeks prior to the meeting, summarize requirements from each completed folder. List specific needs by function room and consecutive time of day and day of convention. Forward it and get a written acknowledgement of its receipt; ask for detailed "unables."

7. Call the hotel's convention service staff into a liaison conference several days in advance of the event - heads of all departments from switchboard to housekeeping to electricians. Review the addendum; if any "unables" still exist, there will be time to fix them.

8. Check and recheck detail every morning before the program begins. According to Murphy's Law, "Anything that can go wrong probably will." Generally, it is the unlikely, rather than the obvious, which malfunctions. If a hitch develops, act! Better to drop a tray of slides than an entire presentation - one presentation rather than a full day.

Given such attention to communication and detail, perfection is highly likely. But if the facility fails to perform, refuse to pay until a suitable dollar adjustment has been made. Kick them in the bills - it's the only thing top management will feel.

Only by penalizing offenders can you really encourage the able facility. All alone and unaided, meeting planners can declare 1973 the year of the honest buck! ■

December 1970

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**NOTE THAT THIS** is only a suggested format. It should be adapted by the association or facility to meet its needs. The important requirement is to reach agreement on each service area and execute a written statement of such agreement. This suggested letter is not prepared for convention center use; the booking of these convention facilities requires a quite different approach.

Dear Sir:

This will confirm the arrangements made by

\_\_\_\_\_ and \_\_\_\_\_  
(hotel representatives) (association representatives)

concerning the \_\_\_\_\_ forthcoming  
meeting/convention. (organization or group)

The \_\_\_\_\_ hereafter referred to as the  
"Association" and \_\_\_\_\_ Hotel/Motel hereafter referred to  
as the "Facility" agree that:

1. The association hereby engages the facility and its staff for a meeting/convention and the facility agrees to furnish same on the following terms:

- (a) Scheduled dates and days of meeting/convention from \_\_\_\_\_  
to \_\_\_\_\_.
- (b) Start exhibit set-up \_\_\_\_\_ A.M./P.M. \_\_\_\_\_ (date)  
(hour)

# Hotel/Association Facility Contract

Suggested Letter of Agreement for Convention  
or Meeting to be Written on Association or  
Facility Letterhead.

*Developed by the American Society of Association Executives  
in cooperation with representatives of the hotel industry.*

(i) A guarantee of the number of persons attending each food or beverage function will be given to the facility at least \_\_\_ hours in advance of the function. The facility agrees to set for \_\_\_ % over the guarantee. The above food functions (package) shall be provided at a per person cost of \$ \_\_\_\_\_. Beverage/liquor by drink and/or bottle shall be provided at a cost of \$ \_\_\_\_\_. Such prices are subject to review up to six months prior to the event.

If a meal function is to be added to the package, the price applied shall be the same as that included in the above package for a like meal.

(j) The following complimentary accommodations will be furnished by the facility to the association. (Description of rooms and suites, dates of availability and numbers.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(k) The facility will give the association notice of any construction or remodeling to be performed in the facility which might interfere with the event. In such event, facility must provide equal alternate space within the facility under contract.

2. The facility and association agree that the following procedure shall be followed with regard to gratuities

\_\_\_\_\_  
\_\_\_\_\_

(Note - specific individuals, amount or % and procedure may be spelled out.)

3. It is agreed by the parties that the foregoing sets forth the essential features of the agreement between the parties and that *specific details* as to registration, rooming of persons attending, handling of material, special services, collection of tickets, accounting, master account charges, promotion publicity and other matters will be worked out in writing to the satisfaction of both parties prior to or during the meeting/convention and generally following the procedures set forth in the Convention Liaison Manual published by the Convention Liaison Committee, 1101 16th Street, N.W., Washington, D.C.

4. This agreement will bind both the association and the facility and except as above provided in paragraph 1(e), may be cancelled by either party only upon the giving of written notice at least \_\_\_\_\_(years)(months)(days) prior to the dates of the meeting/convention or no later than \_\_\_\_\_(specific date). It is further provided that there shall be no right of termination for the sole purpose of holding the same meeting/convention in some other city or facility.

5. The facility and the association *each* agree to carry adequate liability and other

(D)

insurance protecting itself against any claims arising from any activities conducted in the facility during the meeting/convention.

6. The performance of this agreement by either party is subject to acts of God, war, government regulation, disaster, strikes, civil disorder, curtailment of transportation facilities, or other emergency making it inadvisable, illegal or impossible to provide the facilities or to hold the meeting/convention. It is provided that this agreement may be terminated for any one or more of such reasons by written notice from one party to the other.

Yours very truly,

\_\_\_\_\_ (Association)

By \_\_\_\_\_ Chief Elected Officer (title)

\_\_\_\_\_ Chief Paid Executive (title)

Accepted:

By \_\_\_\_\_ (Hotel) (Motel)  
\_\_\_\_\_ General Manager  
\_\_\_\_\_ Sales Manager

\*For associations using more than one facility, a similar contract should be executed with each property.

(E)

"Achieving Objectives In Meetings"  
**PROTECTIVE CONTRACT PROVISIONS**

Within the context of your (or their standard) contract, add these essential self-protection concepts. No attempt has been made to draw legally acceptable phrases, which is best left to your company attorney.

1. It is understood and agreed that the following function rooms shall be reserved and held available for the exclusive use of COMPANY between the times and dates listed and further agreed that time and exclusivity are of the essence:

Rooms Reserved	Available		Released	
	Time	Date	Time	Date
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

2. It is understood that COMPANY shall release any function rooms which might not be used, and said release shall be delivered in writing not later than \_\_\_\_\_ days prior to the dates reserved. Any reserved function rooms neither released nor constructively used will be subject to a daily rental of \$\_\_\_\_\_. Failure to provide the reserved facilities named at the times stated herein shall render the Hotel liable for direct and consequential damages, if any.

3. It is understood and agreed that the Hotel is engaged as a convention facility and therefore the Hotel staff services agreed upon are equal in importance to the Hotel physical properties reserved and/or provided. As a consequence, all requested services agreed upon in subsequent conferences shall be detailed in a written Master Requirements Summary not later than \_\_\_\_\_ days prior to the dates reserved herein and shall become an integral part of this contract. Failure to provide the agreed services of first quality at the stated times shall render the Hotel liable for direct and consequential damages, if any.

4. It is understood that the exact physical structure of the reserved function rooms can affect the plans of COMPANY and it is hereby agreed that should any physical alterations be scheduled in any of the reserved function rooms prior to the dates reserved herein, then the Hotel shall immediately notify COMPANY and COMPANY may, at its sole option and without penalty, elect to cancel this contract.

## SLEEPING SPACE VS. CONVENTION CENTER

### V-B

Part of the problems which the hotels are having in adapting to the needs of meeting managers is a result of hotel confusion about purpose, as a direct result of the rapid growth of complex conventions. In the days when a meeting facility was anything large enough to hold a lot of people, the hotel was the natural source of accommodations. They had the sleeping rooms, and they had the ballroom which could hold the group – and the group was delighted to have the ballroom, which was always ample and often luxurious in decor. Those aren't the standards any longer.

Unfortunately, the basic service philosophy of the hotels has both atrophied and petrified. They do less, but they still do it in the old ways. Although several of the largest new hotels have installed elaborately equipped physical plants, including formal stages and sophisticated electrical control equipment, the convention service isn't always as updated. Regrettably, top management of the complex is almost surely a man who proved himself in smaller hotels long ago – a man who has never been required to understand the communications objectives of the kinds of people who now use the facilities. One cannot blame only the individual hotel manager . . . one can and should blame the dominant facility operators who have seen the changes coming and have resisted. By trying to preserve their seller's market, they have hurt their customers.

Certainly not to their credit is the attitude of the majority of hotels in fighting the professional convention coordinator who grew into the scene in the early 1960's. Yet the development was inevitable: the company or association meeting manager was competent in his planning, and the innkeeper was competent in feeding and bedding crowds, but there was a huge convention service gap to be bridged. The professional convention coordinator bridged it. (See Section VII.)

The gap is closing because a very few hotelmen grasped the problem and provided staffs who understood the growing emphasis on communication – meaningful gatherings. By sheer force of competition these mavericks are forcing changes in industry attitudes. The changes are coming slowly because the significant services cost the hotel money in terms of higher salaries for more competent staff, if nothing else. Worse, the hotels have found that enough customers still buy gimmicks and glamor to permit slipshod attention to conventions to survive.

If you still have problems regularly with hotels, you probably deserve them. Only by exerting all the economic pressure you can muster can you get your message across. If you find it easier to bend, that's your problem . . . and you'll be living with it for years to come.

function room wing, it can empty the furniture from several large sleeping rooms or suites and convert with desks or baize-covered tables. For the few hours involved, good air conditioning and adequate lighting are the only essentials.

If the hotel has everything except an auditorium-size meeting hall – the plight of many luxury motels – try a nearby movie theatre or nearest showlounge. Both have well-designed, acoustically-acceptable areas available; and these areas are generally unused during the day. A bus solves transfer problems easily – and the given hotel has gained a group which it might otherwise lose.

In a pinch, you might put a one-day meeting into the reception or recreation hall of a large church. And why don't more companies take advantage of the fine auditoria which most of the nation's large high schools have – and many gladly rent?

The ultimate solution to space problems, of course, is to cancel the large central group meeting in favor of smaller groups and smaller hotels. (See Section II-D.)

But other things being equal, favor the hotel which is cooperative over the hotel which is pretty; the hotel which tries to understand over the hotel which “does it this way;” the hotel which wants your business over the hotel which lets you know how lucky you are to get space.

Meetings are a people business. Hotels are in the people business but have never realized that fact because the cash has always seemed to be in booze and beds. To gauge success in the booze and beds industry, one need count only dollars. And isn't that the ultimate problem?

There's nothing wrong with the hotel industry as suppliers that a lot of competition can't solve. Swing your economic weight to the good guys . . . help them to take over before the end of your job!

## PRESSURE-PROOFING

### V-D

During peak convention season, the largest facilities find it necessary to operate around the clock in the convention wing because the banquet crowd leaves about 2 a. m. and the breakfast meeting crowd is in about 7 a. m.

As a result hotel staff members are required to work longer hours . . . overtime is generally preferable to more employees in the opinion of hotel management.

What happens, therefore, is that new convention groups are often greeted and served by an employee who has been on duty so long that:

- a) He couldn't produce to his own standards even if he wanted to; and
- b) He comes to you already on maximum over-time penalty rates, which

understandably yours. Extra performance is usually demanded of a person who had no part in the promises made and no share in the profit realized if he goes the extra mile. If you plan *not* to ask for anything extra, you'll be adequately served. (See "Personnel Directory," following.)



"Achieving Objectives In Meetings"  
**HOTEL PERSONNEL DIRECTORY**

(Fill in applicable information for each facility considered)

Facility name: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_  
 Manager: \_\_\_\_\_ Sales Manager: \_\_\_\_\_  
 Catering Manager: \_\_\_\_\_ Convention Service Manager: \_\_\_\_\_  
 Hotel convention coordinator assigned: \_\_\_\_\_  
 Exact chain of command above:

Service Department Heads (meet all on first trip!):

	Name	Regular Hours	Reports to:	Phone Ext.
Electrician:	_____	_____	_____	_____
(Sound):	_____	_____	_____	_____
Carpenter:	_____	_____	_____	_____
Head Houseman:	_____	_____	_____	_____
Front Desk:	_____	_____	_____	_____
Credit:	_____	_____	_____	_____
Housekeeping:	_____	_____	_____	_____
Telephone Operator:	_____	_____	_____	_____
Bell Captain:	_____	_____	_____	_____
Security:	_____	_____	_____	_____
Elevator Starter:	_____	_____	_____	_____
Other:	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____

**BASIC CHECKPOINTS:**

- a) Will these individuals be on duty? If not, why not and who will replace them?
- b) Is anyone new on the job? If so, does he know policies and facilities? How do you know?
- c) Does each understand the program demands and problems you outline?
- d) Does the nature of their response suggest interest in your problems?
- e) Do they suggest better, faster, cheaper, or easier ways to achieve ends?
- f) Are there enough service personnel on staff to assure that one team will be fresh enough to perform to standards?
- g) Do you want to work with and depend on those individuals?

## COMPARING PROMISES & PREMISES

V-F

If the convention and catering managers you meet are suave and reassuring, so in their junior way are the salesmen who call on the meeting manager prospect. Conventions are a very public as well as competitive business, and everyone in the business makes notes on everyone else's customers.

When a salesman calls on you, he has been very carefully briefed on all the catchwords ("buzz words," in Washington) and throws them about with abandon.

Salesmen know you want "prompt, efficient, courteous service," and can certainly swear that "a responsible convention staff is at your disposal." They know everyone likes "impressive atmosphere at prices unbelievably low for what you get." Food service is "impeccable," and the food itself is "superb." The "flow pattern" for the crowd is unchallengeable, and the entire hotel is aware of your need for "split-second timing and silence."

It sounds so idyllic you can almost forget that the salesman has never planned or coordinated a convention, probably hasn't attended many, and has gained what little familiarity he might have during the three weeks he was inside practicing on some poor meeting manager's agenda. And there just might be one of his counterparts waiting at the hotel to practice on *your* agenda.

Promises are as much a stock-in-trade in the hotel sales industry as they are in the political industry. Both spend a lot of time and money telling you they know exactly what you want before proceeding to do exactly as they choose. In both cases, your complaints come after the fact and fall on the most insensitive ears ever invented.

When that spit-and-polish salesman comes in, ask him to spend a few minutes telling you some of the pertinent details about recent conventions in his facility: what were the special problems, and how did the hotel help to meet those problems? How did he assist? Whom? Can you verify? If he can't answer meaningfully, accept his folder and send him home . . . there's nothing more he can do for you.

Hotels needn't teach all their salesmen how to run a convention; but all salesmen should respect your viewpoint and know how it originates; and they shouldn't misrepresent. If they sell from folders and hearsay, admit it, and merely try to arouse your curiosity for the facility, their job is done. But when their quota forces them to sign you at all costs — what does an extra promise here or there really matter? Besides, no one at the hotel will ever know!

As for the folders themselves, you'll usually find it almost impossible to understand exactly what's offered from the printed

# Facility Comparison Guide

(for pre-contract evaluation)

"Achieving Objectives In Meetings"

FACILITY Innkeeping Notes	Name				
	Address				
	Telephone				
CONVENTION SERVICES STAFF	Manager				
	Convention Mgr.				
	Banquet Mgr.				
CLASS	Deluxe				
	1st Class				
	2nd Class				
NORTH AMERICAN SALES REPRESENTATIVE					
CAPACITY	Suites				
	Rooms				
	Beds				
LANGUAGES	Management				
	Front Desk				
	Telephone Op.				
CREDIT CARDS ACCEPTED (or other terms)					
	Specify:				
SERVICE FACILITIES	Restaurants				
	Bars				
	Shops				
	Handdressers				
	Barbers				
	Secretarial Telex				

SOUND EQUIPMENT	List:				
PROJECTION EQUIPMENT	List:				
ELECTRICAL Max Voltage	Supply Wall Floor				
ELEVATORS	Number Auto. Load				
EXHIBIT CAPACITY	Floor load Direct entry Water Compr. Air Electrical				
HOUSE SERVICE CHARGES †Unions usually stipulate a minimum number of hours per man per day. *Cost per hour.	Labor Equipment Printing Photocopies Signs Entertainment Outside Services	†Union	*Cost	Union	Cost
AVERAGE NUMBER OF COMPLIMENTARY ROOMS					
CONVENTION RATES					
PERSONAL COMMENTS	Special facilities, sports & other recreational facilities, honors, clubs, etc; desirable conditions not already covered				

**VI**

Meetings Abroad

## AWAY FROM HOME

### VI-A

If you're going to go abroad, then *go abroad!* Meet some of the folk to whom you're a foreigner. Visit the country you're meeting in. Bump up against their customs and let a little of their mental set rub off onto you.

The ridicule heaped upon the American Tourist everywhere in the world is only an understated observation on one of the prime characteristics of our species: Superficiality.

As exponents of the junk culture, we rattle around the earth, poking and prodding into the musky things of the past; we check them off in the guidebook and move on before the impact of history and humanity can distort our preconceptions. To the tour-world we have given nightlife in our best honky-tonk traditions. And we have given dollars, of course. Why else would civil people tolerate the hordes?

The well-heeled American touring colony abroad is truly grotesque. The loud and the uncertain flock and regale each other with tales of the resorts of this or that country, proving — they believe — their worldsmanship. They go places only to say they've been there (and weren't impressed). They are visible, pathetic, and shallow; and they do a disservice to themselves, their country and the host country by putting it down as they flash their cash.

The crude crowd tend to congregate at the Familiar Name resort compound . . . how better to see absolutely nowhere without ever leaving home?

Familiar Name resort is an investor's paradise — no matter what its value to the traveler. Sometimes it is superior to all else. Sometimes it's a flashy but poor second. Many factors distort appraisals of the International Chain compared to its local competition:

a) Because travel editors of major metropolitan publications get free accommodations at the resort-chain, the chain name gets a lot of exposure — obligatory compliments.

b) Because of the exposure — and advertising — the travel agent can recommend the Familiar Name resort to those strangers His Clients with the ultimate defense against complaint: "It's the most popular."

c) Because of the huge U. S. sales network offered by U. S. chains,

## *MAJOR TRAINING PROGRAM ABROAD CAN BE SUCCESSFUL STEAL*

by Richard Cavalier

Of all the likely contest prizes, foreign travel might be the only award of which the recipient doesn't already have two.

Travel as an incentive for director or distributor sales has long since proved itself, and the major incentive houses are geared for more.

Maritz reports that sales have about tripled since the voluntary embargo by President Johnson was lifted. E. F. MacDonald Incentive Co. expects travel to become the top award; S&H travel division is printing stamps in old-passport green.

But the real potential in foreign business travel will be realized in ordinary business meetings, and only misinformation and misplaced apprehensions are holding it back.

Yes, there are places in the world where the standard of living is so low that even the best hotels are not quite suitable — and you don't have to go there. Even those places are becoming hard to find in this chrome and plastic world — many of the foreign convention facilities surpass what we have at home. That tends to shock the flagwavers.

No, costs are not prohibitive. Although initial trip costs are higher because of the airfare, per diem expenses are so much lower (even for luxury accommodations) that you break even after one week and begin to save money after ten days or two weeks, depending on location. A major training program could be a steal abroad.

SUBSTANTIAL savings also accrue because of the lower labor charges for all kinds of services and equipment. Because the foreign locale itself offers excitement and glamor, there's no money wasted on the maxi-media presentations used at home to make the same old meeting somewhat more palatable.

All convention expenses considered, the foreign meeting costs little or nothing more, and the enthusiasm and long-lasting good will which result are adequate compensation for the company, however the accountants view it.

Specifically, you can go almost

anywhere in Europe and in selected places in Central and South America for less than \$400 per man per week, air fare, hotel and meals included.

Spain and Portugal offer luxury facilities, American plan (room and three meals) for under \$14 per day.

France has opened up the Riviera hotels to off-season meetings for the first time.

Japan's abundant Expo hostels are ready to make a deal whenever you are.

Mexico is ripe.

Caracas has a politically-dictated airfare with subsidy.

Most of the other key cities of the western continents are year-around bargains.

Always you are dealing in group airfares, corporate or association affinities, which begin low enough for 15 people and tumble in price as the crowd grows toward charter.

Naturally a foreign trip requires more preliminary work from the meeting coordinator — his secretary can't taxi over with the forgotten file folder.

But apart from the supply line, it is as enjoyable abroad for the working crew as for the other participants in the event.

To the duties normal for a domestic program (see my October A&SP column) add these considerations and guidelines:

**GEOGRAPHY:** Think Europe if you are on our east coast and think Hawaii (that's foreign?) and the Orient if you are on the west coast.

Southerners can go farther south (seasons are reversed below the equator), and the north central folk should go where the international airlines can take them easily. That system shows you the best initial deal — mix and match as you choose thereafter.

**POLITICS:** Tourists are safe practically anywhere in the world, and even Americans are welcome in most spots. But the over-priced Caribbean has new woes — black power movements that make the indigenous population hostile.

## COORDINATING AND PRODUCING

### VI-B

Even if you have never before been dependent upon the management of the hotel or convention center at home, you probably will be to some degree if you go abroad. And that's not all bad. Service is an honorable tradition in other countries.

So different are the customs, the formalities, and the rituals of business abroad that unless you expect to be often in any one country, it is necessary to learn only the essentials each time. All decisions must be guided by a trusted advisor. He can be your hotel convention manager or a paid U. S. coordinator, but in the last analysis the production purchases must be made by a national of the country you're in for the best results at the best prices. That's another reason to prefer a facility which values service over policies . . . freedom to provide for your own best interests.

Savings are plentiful. For booklets and brochures, you can create camera-ready copy at home and ship the paste-ups abroad to be run through the press. All entertainment costs less, and an evening floorshow – say Flamenco dancers in Spain – can be bought for about \$350 complete – about equal to a single supporting act in the U. S. (See Section VIII.) Local wines are inexpensive and tasty. Incidental help and local tours and transportation are real bargains.

Don't do your own buying – and don't even try to fake it through an American producer-type unless he has offices and skilled employees abroad, or you'll probably end up by over-paying and will not necessarily realize a gain in quality.

When in Rome, get done by the Romans!

## INFORMATION AND ASSISTANCE

### VI-C

Lists of foreign meeting facilities are as worthless as the same types of filler lists for stateside facilities (See Section IV-C), because evaluations differ from country-to-country.

There is only one dependable source for all current internal information for any given country, offered without obligation or public relations bias: The official government tourist office of the given country. Even the national flag airline is only second-best as a source because folders are updated only yearly or less frequently, and the airlines staffs are not expected to stay current.

Every nation with a developed tourist industry has its own representatives in New York City, and all these offices are listed under



that many French cooks and recipes originated in France; Italian in Italy, and on and on. So what's the panic?

Yes, water is bad in most parts of the world – known as water pollution – of which we have our share. So you drink chlorine-free bottled water with dinner, plus your favorite wine and coffee.

Even institutional food abroad is better than it is here at home. When is the last time you had decent mashed potatoes in a local restaurant or hotel? Why must everyone order espresso at home to get real flavor? Espresso is a descendant of the rich, rich Italian espressos – but you knew that.

Food is important in most parts of the world – in some places because good food is a tradition and in others because there's not enough to go around. The result is the same: attention to what's available.

As a result, the Belgian main dishes, French sauces, Swiss ice creams and chocolates, Viennese strudels and game, and the Italian pastas are rewards for the appetite. The British have marvelous theatre.

Sophisticates relish Japanese sukiyaki and tempura; and Kobe and Argentine beef rivals that of Kansas City. Almost everywhere in the world except home you get fish from the water instead of the freezer.

This is not to deny that some countries have particularly strange or spicy things – fishheads with rice, for one. But those things might not be served on request in a quality foreign hotel simply because they are not foods of international acceptance – the ultimate standard.

When you plan your menu, you can expect to see veals and roasts in all kinds of trimmings; but beef filet is usually termed a *tournedo*, and it's smaller than at home. The variety of menu and imaginative trim for basic fare will amaze you. Somehow, we miss a lot that other people get . . . especially considering that the U. S. is composed largely of European immigrants, their descendants, and their specialty foods.

The American chains tend to serve the blander foods – easily recognized by the crowd. This might be a comfort for the first tentative meals of the first-time traveler, but if you leave without letting the chef elaborate a little, you're not utilizing the potential of the *foreign* part of your tour.

## LANGUAGE BARRIERS

### VI-E

These days, you almost have to invent a language barrier if you want to enjoy one. English is the second-language for most of the educated world; and even in the larger countries where a second language is not common, the travel industry has a monopoly on the Anglophones.

around the central city to satisfy curiosity; then take a four-hour nap. By mid-afternoon one is refreshed enough to survive dinner and yet relaxed enough to sleep when their clock says midnight. By the second day, the adjustment has been made. Playing-it-by-ear takes longer and is different for each person – not good for groups.

Ship your group off on Friday night; on Saturday, they recuperate; on Sunday they sightsee; on Monday they're ready to work. Or fly out on Sunday night; have a party on Monday night; and begin work in earnest on Tuesday morning.

And you benefit directly from "extra" time they feel was left to their own discretion. The best interests of the meeting manager and his audience conflict only when one has been miscalculated.

## AIR FARES AND PACKAGE TOURS VI-G

All airfares are regulated by one or more domestic, foreign, or international agencies, to say nothing of voluntary associations. As a result, so many regulations and exceptions entangle each other that even the airlines are not always sure which rules apply in a given situation.

The contenders for your dollars are divided into two groups: the regularly scheduled lines and the supplementals, which fly only at contracted times.

Supplementals pioneered the low-cost charters, forced the recent lowering of fares by the scheduled carriers, dominated the low-cost market, and are now being countered by the Travel Group Charter of the scheduled lines. TGC's allow any group of 40 or more to get a charter price break while traveling on the same plane with full-fare passengers. Travel wholesalers can consolidate smaller groups, if you can't get 40 together. No one has proved that it costs less to carry one passenger than the other at his elbow, but that shows what one cartel can accomplish when fighting another.

If you're going to get the best deal for your group, best you familiarize yourself with the rudiments of the travel industry and its intrigues:

### SCHEDULED AIRLINES:

All member companies of the International Air Transport Association (IATA) are required by regulations to charge identical airfares for identical itineraries. Only two trans-Atlantic carriers are not members, and only one of these operates direct from the U. S. Therefore, given a particular departure point and a particular destination, the price your group pays would be determined by the size of the

more passengers because you buy the whole plane;

b) TGC's: probably your best buy, under current regulation, if you can't muster 120 or so bodies;

c) appended vacations: if employees can take vacation time in conjunction with the meeting (IRS gets involved!), you can either charter several planes for different dates or book TGC's on a staggered schedule;

d) package inclusive and exclusives: when you've finished paying for everything, will the package still be better and cheaper than individually-contracted services?

Airfares and tours require a good deal of incisive thought, but there are some great bargains waiting for the shrewd buyer.

### SOMETHING-FOR-NOTHING – TRAVEL INDUSTRY STYLE VI-H

Given the eagerness of the travel industry to capture your attention and group business, a few principals have been carried away with campaigns which promise far more than they can conceivably deliver.

Here are some meaningful criteria on airline travel for groups:

a) Will the so-called "convention" service rendered be different from and additional to the service the agent, airline, or hotel normally provides to any other passenger or group? Offering you a "convention desk" to confirm tickets during a meeting is only an extension of their regular ticketing service and is more valuable to them (since it locks out competitors) than to you.

b) Does the agent, airline, or hotel talk rooms and food and even entertainment when it talks conventions? The come-on experts haven't learned that meetings are about *people*; don't bother to discuss communication, workshops, the surround, or feedback – you don't owe them an education!

c) Is the agent, airline, or hotel referring you to an "associate" group which in turn offers either its sales pitch or actual service for which you ultimately pay? Who really gets what from whom? (See Section I-E.)

Now that international conventions have mushroomed over the past couple of years, travel industry awareness is catching up. But there are few convention-capable experts in the travel industry. The responsible organizations are being careful and precise, but the shady ones are trying to fake it with come-on advertising and even misrepresented alliances with theatrical producers. Talk with several travel suppliers; to compare every aspect of the services they claim to offer is your only hope of buying help instead of problems.

"Achieving Objectives In Meetings"  
TRAVEL INDUSTRY SERVICE EVALUATOR

Country (city): \_\_\_\_\_ Group size: \_\_\_\_\_ Season: \_\_\_\_\_

Agent, Airline; or Hotel: \_\_\_\_\_ Sales Representative: \_\_\_\_\_

1. Can this airline take you from where you are to where you want to be—direct? [Yes] [No].  
Is the hotel near the international airport? [Yes] [No]. If not, what provisions must be made?
  
2. Does this supplier's package offer only transport and related services? [Yes] [No].
  - a) If yes, does it have favorable service and schedules? [Yes] [No].
  - b) If no, is its added "convention" service limited to tour packages? [Yes] [No].
  - c) If yes, are facilities and prices [better than] [comparable to] [poorer than] those outlined by the Government Tourist Office?
  - d) If no, does the airline claim to offer bonafide convention service? [Yes] [No].
  - e) Are the hotel facilities [adequate] [above average] [superior]?  
Fairly priced? [Yes] [No].
  - f) Are the meeting facilities [adequate] [above average] [superior]?  
Fairly priced? [Yes] [No].
  
3. Which transport-related services are offered? (Check)
  - (a) Ground service at home airport (group coordinator, group tags, etc.).
  - (b) Ground service and transport on arrival (transfer to hotel).
  - (c) Information and help with air freight and customs.
  - (d) Special inflight service and/or foodservice, if charter.
  - (e) Variety of travel schedules for vacationers in the group.
  - (f) Informative folders on destination country for your mailings.
  - (g) Other:
  
4. If Convention Service is offered, are these *bogus* services highlighted?
  - (a) Special reservation desk in your hotel (they benefit).
  - (b) Referral to theatrical producers who want to sell to you.
  - (c) "Convention" tour packages identical to those offered to any other travel group.
  - (d) Staff "convention coordinators" who have never planned a meeting and will not be assisting with meeting coordination here or on-site.

## TRAVEL AGENTS VI-J

If your first experiment with sending employees abroad is with a pair or very small group as a contest or incentive award, you will probably find a travel agent helpful. In such a case you would want a quality tour offered by a dependable operator and would like to see a variety of suggestions within your price range.

The travel agent is in business for that purpose. He is an authorized sales agent for most airlines, shiplines, and hotels, as well as countless domestic and foreign tour operators. He sells on commission. On airlines tickets, because that commission cannot be returned to you if you buy direct, the travel agent's service is free. With hotels, his commission is generally added to the base room rate. He gets commissions from tour operators, too, although some operators will sell direct to companies at a discount. He's a wholesaler when he buys for his own package tours — which he sells retail to you.

Exactly what is a travel agent? Good question. One travel agent is as different from another as are his own background, his own personal travel interests, and his own business methods. He is an independent businessman, serves as he chooses, and apart from fiscal responsibility is not closely observed. He is regulated only by airline conformity to IATA standards and is kept abreast of the world by personal travel, several publications, and his association, the American Society of Travel Agents (ASTA). ASTA represents about half of almost 9,000 agents in the U. S. and endorses minimum performance standards and licensing for all.

If you want to spend a few thousand dollars on a few travel awards, head for a travel agent — he can give you a fistful of folders, recommendations, and even the tickets in your first visit. Quick, neat, and settled.

But if you're shopping for a convention facility, treat the travel agent as you would any other supplier or middleman: what can he do that is different from and better than someone else?

In general, travel agents are no better prepared than the hotels or airlines to offer true convention coordination service from staff. It's just not their field. Some might work with a consultant or coordinator and, therefore, offer a comprehensive service. Major cities offer many alternatives. On the other hand, if you are not located in a metropolitan area, then the local travel agent will surely be able to save you time in the long run. He will, after all, call the same people you must ultimately contact — the government tourist offices and the airlines and tour operators — and he already knows who's who. If he creates a package tour, commissions might or might not cover his fees for special

"Achieving Objectives In Meetings"  
**FOREIGN TRIP COST COMPARISON GUIDE**

Location: [Europe] [Pacific] [South America] Other: \_\_\_\_\_

Season: Ours: \_\_\_\_\_ Theirs: \_\_\_\_\_ Size of Group: \_\_\_\_\_

DIRECT EXPENSES	Domestic Cost (Previous years)	Foreign Costs	
		City	City
Hotel Expenses, _____ persons:			
Rooms	\$ _____	\$ _____	\$ _____
Breakfast	_____	_____	_____
Lunch	_____	_____	_____
Dinner	_____	_____	_____
Cocktails	_____	_____	_____
Hotel Services:			
Electricians: \$ _____ per hour	_____	_____	_____
Sound men: \$ _____ per hour	_____	_____	_____
Carpenters: \$ _____ per hour	_____	_____	_____
Housemen: \$ _____ per hour	_____	_____	_____
Lighting equipment	_____	_____	_____
Sound equipment	_____	_____	_____
Platform stages	_____	_____	_____
Drapery	_____	_____	_____
Other:	_____	_____	_____
Incidentals:			
Phones: \$ _____ per local call	_____	_____	_____
Laundry	_____	_____	_____
Local transportation	_____	_____	_____
Temporary help	_____	_____	_____
Other:	_____	_____	_____
Exhibit Facilities:			
Rental of space	_____	_____	_____
Labor: \$ _____ per hour	_____	_____	_____
Air, water, electricity	_____	_____	_____
Security	_____	_____	_____
Other:	_____	_____	_____

**VII**

The Producer as Business Assistant

## THE PRODUCER AS BUSINESS ASSISTANT VII-A

Given abundant time and assistance of your own staff – and assuming the absence of theatrical skits – coordination of a meeting is definitely a do-it-yourself affair . . . this text was designed to make such results predictably and uniformly positive. Because your staff cannot always concentrate on meeting needs, outside help might be bought. Under these conditions it is a business service you are seeking, essentially detail-work.

For more complex meetings, one might seek advice from experts in the communications field: psychologists and sociologists, training specialists, and convention or theatrical producers – or media advisors – depending on the particular combination of needs. Program consultants do exist as such and can help you to develop the syllabus.

The argument against using the theatrical supplier as an advisor in programming lies in the regrettable fact that the demonstrated interests of the producer and his clients have not been seen to coincide during the past dozen years – maxi-media production is the proof.

Therefore, if the producer's judgment is to be valued at all, then it a) must be purchased by contract to hold him legally responsible for possible bias, and b) must not involve areas not legitimately related to theatre, film or general coordination. A very few producers might offer a coordination service independently of theatrical program components, but the same cautions might be observed when he recommends media and techniques.

Don't ask the producer's opinion on the kind of tools he is not originating – training programs, exhibits, booklets. Often the theatrical producer thinks such frills are a waste of budget. Do ask his opinion on the kinds of presentation techniques your speakers might use while on stage utilizing and explaining those same tools. By making such distinctions, you will help to insulate yourself from the kinds of unfortunate presentations which bury the message under a super-spectacular show.

When in doubt, understage. Not only do you avoid costly failures, but you also hold in reserve significant sums which might accomplish far more when spent in other ways.



## AN EFFECTIVE SALES MEETING COSTS NO MORE THAN A BUMMER

by Richard Cavalier

How much should an effective meeting cost? Answer: nothing extra!

A meeting which achieves measurable objectives has to have a meaningful goal that can be achieved by the methods clearly outlined by an authority (speaker). Each person in your audience, whether there are a half dozen or thousands, must have the same understanding as he would if the meeting were one-to-one in your office.

That calls for a total re-evaluation of what has passed in recent years as "successful programming." Here are some sociologically, psychologically, educationally and economically valid criteria by which to pre-evaluate your meeting plan:

Contrary to most research until its time, and all research since, Marshall McLuhan's slogan "The medium is the message" can be used only dishonestly in meeting rooms. Splashy maxi-media shows are ego-trips for the meeting coordinator and/or producer.

Meetings are a commitment to convey information – to communicate – and are subject, therefore, to the requirements of adult education: dynamic interaction among the learners and teachers (A&SP, March 1970). Men must repeat, practice and rehearse – not just clap.

Unless you measure (by written test and/or role simulation), you cannot legitimately claim success in communicating. Field results are subject to too many foreign influences to be a valid measurement of meeting results. Ten months later who can prove a show flopped?

The biggest dog and pony show on earth (File No. 70301, revived yearly since the 1940s) cannot outperform

the measurable and continuing educational value of a competent, repeatable training program.

If the projector's light bulb burns out during a presentation, that is an acceptable mechanical hazard, and no one is to blame. But if the message fails to be delivered because that same light bulb fails, that is a failure of the technical construction of the program, and the producer is to blame.

At an average consulting rate of \$350-\$400 per day, and at an average development rate of one hour's program complete in manuscript in one week's billable time, a custom training program should cost under \$2,000 per hour's running time, plus research, if any. Pay one-third or less for library programs.

The type and quantity of support materials (Tools, A&SP, August 1970) will determine additional costs. But controllable-cost tools will produce measurable results. Better, the program is usable, adjustable, and repeatable throughout the valid life of the topic.

TO GET REAL MILEAGE out of your meeting message and budget, create the entire meeting from the viewpoint of your audience. If you need elephants and dancing girls to tell the convention audience (or salesmen) about the new concept (or product or service) then they need the elephants and dancing girls to relay the message. That is the ultimate measure of what is "needed" to put any message across. Meaningful information evokes response.

Plan to talk intelligently to one man, and you will increase your chances of reaching all of them. Help

one man to achieve, to care about the group and his standing in it. You will discover that no man will pass up the opportunity to improve himself if he is treated as a rational human being working voluntarily.

That is the point at which a meeting planner matures, because he never again confuses education and entertainment – or content and packaging.

PRODUCERS HAVE countless packaging tricks to help make a convention look slick. The tricks are often the most visible but least intrinsically valuable of the producer's supervisory services. And most of them have been around the convention so long as to be community property – it's highway robbery to be billed for the "idea."

Here are a couple dozen free ideas which were first used not later than 1965 (see adjoining box). Pay only for the hardware. Even do-it-yourself is feasible.

Tricks aside, if your producer can't help you educate the group, you do not need him. Spend your budget on tools to put your message across.

When you kick the dog-and-pony-show habit you kick the need for converting huge ballrooms into imitation theaters at your expense. The combined saving can be impressive.

What it comes down to is that you really need only a message, someone to deliver it properly, and someone who will react because the message affects him.

The message is the message – don't ever forget it!

June 1971

## DON'T BUY THE PRODUCER'S PROBLEMS VII-B

The producer is the theatrical version of the office business manager. On your staff he is a supplier-advisor or outright purchasing agent. Every major producer working in the meetings and convention field today has a background in theatre and entertainment, is surrounded by staffs drawn from essentially identical background, and tends to make critical decisions as they would be made in the theatre. However valid his decisions as a man of theatre, the producer-as-educator has been a flop!

Because he is familiar with audience feedback in theatre – known as laughter and applause – he applies those same criteria to the meeting room. The result is much enjoyment, little or no education, no measurement of achievement, and much blame for the salesman audiences who a) never will know why they were told to sit through an extravaganza with so little application to their jobs; and b) can't perform better once home again because they have learned little or nothing applicable to their problems.

Extravaganzas are big on parodies of Broadway musicals. But TV's "Electric Company" has discovered that even children are turned off by parodies on unfamiliar themes. Only a minor portion of the U. S. population ever gets to Broadway. They couldn't care less about the deft pun on an old lyric.

Because theatre people deal with what's most popular and trendy, they also tend to learn the business catchwords floating around, and they often use that "foreign" language for *face credibility* – the illusion of knowledge which has no direct relationship to true knowledge. If their face credibility banter gets past your barriers, then you might not press for details until you must depend on their non-existent meeting-room knowhow. Too late!

Pity the producer. His background is totally different from yours . . . he does not understand your problems and priorities in depth and in the industrial and human relations contexts.

Yet he must appear authoritative; so he leads you toward what he knows – whether or not it is what you need. It is disastrous to sign a contract with a producer who does not already understand the concept of your message – tantamount to marriage with intent to reform the spouse. Signing a contract will not give him insight – only authority to stumble ahead. Compromise with objectives? Program failures are the common concomitants of hasty or premature contracts.

This is not to say that today's producers – despite their poor overall record – are necessarily frauds-by-choice. By all theatrical criteria they produce programs and films for you which they all hope (and most believe) are successful. The problem is that the criteria for

and often their "skits" are superficial, gutless playlets which promise more involvement than they deliver. Skits are not in themselves sociodramas, which demands audience involvement.

As coordinators, the producers can provide liaison with the selected facilities; rent and supervise stage and projection equipment; supervise rehearsals; inventory materials; collate lists; and prod the committeemen with whom they are working . . . all are strictly mechanical tasks. Billings should reflect a low rate.

If a dramatization must be staged, you should write or outline its basic message structure; the producer can rewrite, cast, and direct it . . . both creative and mechanical time and tasks. Billings should reflect both rates in specified proportions.

Suppliers of adult education components are only now emerging as a visible group . . . and the future job of selecting message and media will be considerably easier than in the past. To ask a showbiz type to select your message components is to strain all program ideas through an unthinking man's filter. It's not even fair to him.

Yet to use a producer precisely for the kinds of capabilities which are naturally his is wise coordination. Because you can buy consulting time reasonably (\$500 daily for a New York principal; \$350-\$400 for an associate; \$250-\$300 for a junior member) the producer as supplier-advisor often costs no more and sometimes less than salary, fringes, and overhead for a staff coordinator.

It's all in the billing structure. If your producer will offer creativity at creativity rates and mechanical service at mechanical rates — he's selling right.

And if you believe he understands what you're talking about — you're buying right. In your long term relationship with any producer who has proved his concern for your interests, feel free to give all assignable duties for coordination and entertainment to one organization — it simplifies things.

But in the initial years of choosing a producer, spread the assignment over at least two firms, and let them compete. Of course their end products will be different: one might work on a dramatization and stage equipment; the other, on entertainment and remaining hotel liaison. Therefore measure their relative abilities to execute *your* ideas recognizably, economically, and reliably.

And don't be so committed to the principle of experimentation that you let the capable firms drop away; retain the prime supplier and combine with a new alternative in future years. While it's a slower process, it assures that after the first year you have at least half a team returning. After two or three successful programs, a superior producer should get 100% of your related work. He's earned it. Even so, remember that the producer's high-profit services are theatrically related,

When making assignments, you took care to make logical assignment groupings. So the committee which is locating local union help and technical equipment is also checking for the other types of labor — registration clerks and usherettes (see Section IV-A and IV-C). That's PERT reasoning. Apply it to the producer's assignments, too.

If you have a dramatization, the producer must interview actors and can easily select exhibit models at the same time. There's nothing wrong with assigning the visual portions to one producer and the live portions to another. BUT have all requests and correspondence between producers flow through you so they cannot as easily sabotage each other, as has been done. The one who suffers most from such intrigues is you.

The liaison committee can work with the producer on meeting room staging requirements but can proceed independently on all other rooms and functions. The mix of responsibilities doesn't matter — but the explicit assignment of responsibilities is indispensable.

There's no set plan for labor-sharing via a paid coordinator or producer; and one year's plan is not necessarily valid the next. If you have carefully constructed your PERT Diagram, trust it to lead you to correct decisions.

#### WHAT NOT TO ASSIGN VII-E

Certain functions are highly subjective in nature. No one else can see with your eyes; so it is unfair and unwise to assign to an outsider the responsibility for decisions he can make correctly only by accident or by study periods which are themselves more costly than do-it-yourself.

Chief among these categories is the inspection of several potential facilities before contract. If you have previously worked with a producer and expect to hire him again, you should ask whether he sees any production problems in any of the facilities under consideration. If not, the decision is still yours. If you have not yet selected a producer, he can later select media to suit the place. Media are far more flexible than the people who select them.

Menu selection belongs to the meeting manager or his committee — not the producer. Food is a reflection not only of the kinds of people who will attend, but also of the company's attitude toward that function and that staff level. Whether to have entertainment is your decision; and obviously the producer recommends within your budget.

Tipping is often a problem. Whether or not a flat percentage is added to the bill, you'll probably disburse. Give tips directly to the persons who have earned them; write checks for those not available.

"Achieving Objectives In Meetings"  
**COORDINATION BID ESTIMATOR**

Meeting title: \_\_\_\_\_ City: \_\_\_\_\_ Dates: \_\_\_\_\_

1. Number of scheduled hours of program: \_\_\_\_\_ hours complete.
2. Number of days over which schedule is spread: \_\_\_\_\_ days; \_\_\_\_\_ evenings.
3. Number of man-weeks of time estimated for total coordination  
 (at least equal in number to the number of hours in Item 1 above): \_\_\_\_\_
4. Number of hours/weeks which can or must be handled by staff: \_\_\_\_\_
5. Discretionary difference in hours/weeks count  
 which could be assigned to an outside coordinator/producer: = \_\_\_\_\_
6. Of the discretionary time assignable, what portion is:
  - a) Mechanical (lists, checking, canvassing, rentals, liaison): \_\_\_\_\_ hours
  - b) Creative (program structure, scripts, design/art, stage): \_\_\_\_\_ hours

7. Coordination rates quoted on competitive bids by producers or consultants:

Firm	mechanical	creative
a) _____	\$ _____	\$ _____ per [hour] [week].
b) _____	_____	_____
c) _____	_____	_____
d) _____	_____	_____

8. Cost estimating for total discretionary time:
  - a) The lowest quote above would cost: \$ \_\_\_\_\_ Mechanical; \$ \_\_\_\_\_ Creative.
  - b) The highest quote above would cost: \$ \_\_\_\_\_ Mechanical; \$ \_\_\_\_\_ Creative.
  - c) Long term contract (more than \_\_\_\_\_ hours or weeks) would be discounted  
 by these firms:  
 \_\_\_\_\_ % discount for \_\_\_\_\_ units.  
 \_\_\_\_\_  
 \_\_\_\_\_
  - d) Does the discount structure affect the previous high and low? [Yes] [No].  
 New low bidder: \_\_\_\_\_

9. By value judgment, do the low bids and best capabilities coincide in any one of the bidding firms? [Yes] [No]. If yes, specify:  
 If no, what is the best combination? Why?

**WIII**

Show-Biz for Entertainment

## IMPRESARIOS vs. INDUSTRIAL PRODUCERS VIII-A

Just as there is art for the sake of art as well as "art" for the sake of money, so there is a difference and even more pronounced distinction between the entrepreneurial risk taking of the public stage and the risk-free industrial stage.

Whether your tastes run more to the artistic productions of Sol Hurok or to the contemporary theatre of David Merrick, both men alike risk capital, reputation, and public apathy in the hopes of winning a profit which could be huge. So could be the losses — and tremendous losses have accrued to both men on occasion. They are entitled to sell tickets at any price they choose, limited by sales resistance only.

By contrast, the industrial producer risks almost nothing in the given production assembled for you, whether it is banquet entertainment or supposedly business-oriented. In both cases, he is guaranteed a buyer — a paying audience — at a stated price; and his sole risk is the very normal risk for any business — that of a sales presentation. In short, because the industrial producer does not risk his venture capital, he is not entitled to realize venture-capital risk rewards. This applies equally to the movie makers — not only for short feature films for industry but also and especially for TV commercials, which are phenomenally overpriced by the rules of business economics.

Compared to the more familiar service, the industrial producer is the exact counterpart of your advertising agency; he has assembled a staff of varied abilities — even talent — to do the many kinds of things required to yield a specific service at an agreed price. As an agency, he buys goods and services approved in advance and, if he recommends poorly, is liable essentially to loss of the account. If your advertising agency is not permitted under these terms to quote any price it pleases for a given campaign (which is infinitely more complex in the planning than is stage production), why permit it of a producer?

The industrial producer should not necessarily be a fifteen-percenter (if only because his activities are more directly controlled by his client), but neither should he be an unchallenged profiteer.

His advisory opinion of what constitutes a highly complementary group of performers is precisely what the producer sells: his major

**HOW**

# **MEETINGS**

**HELP SALES**

## **Well-Tempered Spectaculars Still Have Their Place**

By RICHARD CAVALIER / Contributing Editor

**N**ow that the multi-media spectacular has been so decisively devalued in teaching situations, some meeting planners are wondering whether the spectacular has any place in the meeting room. The answer is a well-qualified yes.

For regular in-house meetings, the spectacular serves poorly, because complex company communications objectives usually require educational, not theatrical, formats. For the occasional momentous development, however, a brief, emotion-grabbing segment can herald the news to company people. And for such outside events as consumer relations and trade expositions, the spectacular can be a valuable attention-getting device to entice prospects into an informal meeting where personal sales pitches may be made.

Whatever the reasons, if you find yourself involved with a spectacular, here are a few pointers for controlling it, rather than vice versa:

1. **Establish a sane budget** and don't be pressured into increasing it. Theatre is expensive because pricing is a what-the-traffic-will-bear proposition. Ask for itemized estimates on bids and demand an itemized final statement, comparing costs with friends inside and outside your company.

2. **Be prepared for surprises.** A theatrical event, whether live or mechanical or mixed, is subject to all the vagaries of actors and machines. Failures among staged spectaculars fall into two main categories: (a) simple mechanical failures, such as a jammed projector or burned fuse, and (b) program failures caused by a mechanical

failure which kills the message. The latter is an intolerable hazard for which the producer is responsible.


3. **Never abandon the message** to a hazardous technique dependent on either actors or film. Always have a Plan B ready in case of a mishap on stage, even if that means combining company and outside personnel in unlikely ways (SM, Mar. 5).

4. **Don't let the presentation** get in the way of your message. The purpose of dramatization is to clarify a principle. But even if the message is clearly written, budding Hamlets often pay more attention to stage business than to company business.

5. **Supervise judiciously.** Purge the urge to be a show-biz impresario. Clients add to their own costs by interfering with the professional production staff.

6. **Set quantified goals** before placing the initial contracts. Then measure every component of the proposed program against its aim. Hazy goals, such as "increased sales," are in large measure responsible for industry's wasting millions of dollars each year on misplaced spectaculars. Generally the theatrical cost/efficiency factor will be poorer than it is for other meeting-room techniques, but it doesn't have to disappear altogether.

Remember that you are using show business elements to achieve a specific purpose. If you impose company goals rigorously on every aspect of the spectacular, you will have a fighting chance to produce a winner. Beyond that, nothing is for sure.

Then there's that final important question: Under the circumstances, do you really *need* the show at all? 



**"Achieving Objectives In Meetings"**  
**SHOW-BIZ COST ESTIMATOR**

Meeting title: \_\_\_\_\_ City: \_\_\_\_\_ Date(s): \_\_\_\_\_

1. a) Group Size: \_\_\_\_\_ b) Budget: \$ \_\_\_\_\_ c) Cost per Person: \$ \_\_\_\_\_

2. Alternative forms of entertainment available in that city: (Check)

(a) Cabaret Revue—*their facility*. [Yes] [No] Because: (consider house capacity, distance, prices, etc.)

(b) Cabaret Revue—*our facility*. [Yes] [No] Because: (consider quality, cost).

(c) Dinner & theatre combination there. [Yes] [No] Because:

(d) Special stage show. [Yes] [No] Because:

(e) Music for cocktails & dancing only. [Yes] [No] Because:

(f) Open (unscheduled) night for their choice of activities. [Yes] [No]  
Because:

(g) Group tickets purchased for public event (sports, theatre, music, etc.).  
Because:

3. If a special stage show is preferred or required,

Basic production costs are —

Platform stage: \$ \_\_\_\_\_

Lighting and sound equipment: \_\_\_\_\_

Stage decor or drapery: \_\_\_\_\_

Labor for work above: \_\_\_\_\_

Union minimum for orchestra: \_\_\_\_\_

BASICS, SUB-TOTAL: \$ \_\_\_\_\_

Discretionary production costs are —

Star performer: Low \$ \_\_\_\_\_ High \$ \_\_\_\_\_

Supporting acts (all): \_\_\_\_\_

Room decor: \_\_\_\_\_

Orchestra rehearsal: \_\_\_\_\_

Producer's fee: \_\_\_\_\_

Options: \_\_\_\_\_

Contingencies: \_\_\_\_\_

Multi-media sequences: \_\_\_\_\_

DISCRETIONARY SUB-TOTAL: \$ \_\_\_\_\_ avg.

ANTICIPATED GRAND TOTAL: \$ \_\_\_\_\_

## THE PRODUCER'S FUNCTION VIII-B

Although the stars in your eyes might make the producer's price seem rather reasonable, it's necessary to remember that the producer is by nature and actual function a business manager for hire. He contracts to bring together all the required performers and services in a given format in a given place at a given time, and for a given price. Formats are varied:

### VARIETY SHOWS:

By the nature of the variety performers, the producer is limited in the type and amount of influence he can have upon a given group; he exercises his creativity by combining performers' talents wisely to offer some amount of entertainment to all tastes in the audience. His sense of pacing helps mold the final show but does not "create" it. Variety artists (also known as "club date" performers) have a set routine which varies hardly at all from one performance to the next. While the producer might ask for more or less time than the 12-minute average, the performers themselves determine which material is to be added or dropped. They are the final authorities on timing for their material.

Once the performers and their orchestra have been selected, the balance of the production — the show itself — from the viewpoint of the producer is more mechanical than creative . . . more certain than hazardous. Yes, a performer can be late or can cancel, but that is not the producer's creative failure, and a return of your money paid for that non-performance is the most you can ask in compensation.

Yet theatrical producing is not a do-it-yourself kind of job, even though you have the legal right to hire direct. Theatre people are a different breed. Egos thrive on adulation and collapse on even gentle rejection. The unions sometimes get in each other's way, and the essential pre-show rehearsals are run through in an argot and with a careless dispatch which the uninitiate find ulcer-inducing. Theatre production is a craft — anyone can learn; few do.

Theme decor (Night in Paris, etc.) costs only \$100 or so more than basic lighting and is worth every cent! Besides creating a promotable, visible thematic rendering, it establishes a visual center from which other values can draw.

### BOOK SHOWS:

Book shows are less common these days . . . mostly because everyone has seen so many good performers in situation comedies on TV that it's almost impossible to compete except at very high prices. You are, in effect, creating a full play each time you attempt to script a

Then bands went into eclipse, having staged a comeback on the nostalgia wave of the past few years.

Yes, you can still hear those same bands – if not always the original bandleader, at least the original music library, which means the same sound. It's still highly danceable for the plus-forties; and the young think it's camp.

The Big Band carries its own singers and usually has a comic relief via comedian or instrumental horseplay. In short, it's a complete ninety-minute show (and will play longer) which comes well packed, replete with tux and orchestra stands. Sprinkle with money, and it unfolds itself and begins to play.

If a band is not in your area, you can't afford to fly them in; but if they are within 200 miles or so, their bus will get them into town at a surprisingly low cost. In fact, the Big Band is the least expensive "name" entertainment around.

#### THE SUPERIOR PRODUCER VIII-C

The superior producer is the man who can take your budget, whatever its limitations or largesse, and create an entertainment program which by comparison with standard productions, makes your own show a real buy.

A producer who is concerned about you will take time to discover what you think your group is like – their economic and educational level, the type of things that have been successful or unsuccessful in the past, and which stars in your budget range you think might be most appealing to the group. He'll decide the rest and ask your final approval via one or several alternative "packages."

The producer's biggest problem during this preliminary planning period is trying to keep his client from second-guessing him. Second-guessing is only do-it-yourself once removed – and worse. Occasionally a marginal producer will encourage clients to *meet* the girls or take a *commission* – which ensures that client (honesty apart) an automatic and very expensive producer with the goods on him forever after. An interesting business, show-biz.

But it is a business. Treat it as a business, and your chances of lining up a reputable producer will be much enhanced. And when you find that man, stick with him everywhere in the country. An extra airfare won't break you . . . blind buying might.

54" is desirable. Most facilities try to dissuade you from the latter because they can't supply that number of risers. That doesn't affect the need.

The overall surface of the stage is dictated, of course, by what will be on it. For music only, the bandleader will specify platform dimensions when you hire him. For a full show, the producer himself will determine the needed area.

Microphones are desirable always, and the performers will outline their needs.

A background of canvas or drapery is required as a visual stop, or the stage appears tentative. Besides, a backdrop hides the musicians and performers on their breaks. Occasionally a length of folding screens is offered free by a hotel; but drapery is usually billed by the running foot . . . as is a skirt for the stage. Neither charge is justified on a "free" stage.

If the hotel insists on charging for a plain backdrop — and even if it doesn't — consider using a theatrical painted backdrop. These might be plain or fancy, but the livelier scenes can be the focal point for any thematic decorations in the room. Whatever you install must be fireproofed. The hotel carpenter will tack it to a wooden framework which the hotel will build and gladly charge you for, even though the lumber was cut and paid for fifty shows ago. Generally \$100 is adequate for a one-night rental of an elaborate backdrop, and any theatrical supply house (see the Yellow Pages) will quote. Cash and carry.

Union regulations allow musicians a rest break in each hour of the three hour minimum. That creates lulls best overcome by carving a trio out of the basic orchestra minimum — alternate them, gaining continuous music at no extra charge. Those who were dancing to the orchestra probably will not dance to the trio, but at least there is not the "let down" that drives people out of the room.

The cliché location for the dance floor is right in front of the stage — creating a vast desert for the performers, who both need and want eye-contact with their audience. *Always* place at least one row of tables alongside the stage and dance floor. You gain one extra "ringside" row, of course; but more important, you give the performer an indispensable measure of audience feedback, called laughter and applause.

That's the ultimate measure of success in entertainment — but what does it prove about education?

Special lighting — preferably colored — is essential to the professional appearance. Lights add sparkle and visual excitement to an ordinary setting. Any central-city hotel has followspots, which are probably owned by the local Stagehands Union. There is usually no

## ALL THE MARKET WILL BEAR IS RULE OF THUMB FOR STARS

by Richard Cavalier

In case you hadn't noticed, there is a pricing structure for entertainment: What the traffic will bear!

While the price paid for the services of key entertainers varies tremendously, the supporting variety acts used to complement the star performers fall into common pricing brackets, and the union musician minimums are identical throughout a given city's central district.

Therefore, a significant part of the huge disparities in prices between essentially identical shows is artificial and willful. Today's pricing methods are the equivalent of a single restaurant's pricing each omelette differently on the theory that different eggs are used each time.

If you have any hope of surviving or beating the present system, you will have to try to understand it.

FIRST, there's the star — the publicly acclaimed talent that can command any price within reason and, like all of us — tries for the top dollar. Stars work both for money and for vanity and sometimes will trade one for the other. Of they may work at a cheaper rate for fans or potential tv sponsors. Although they'll work once or twice for free for a current sponsor, their allegiance is to themselves alone.

Second, there is the star's agent who, as a 10%er, can boost his earning fastest by boosting prices. His only other alternative is to work harder. Besides, by boosting prices, he thinks he is proving he is indispensable to the star's career. His allegiance is to the buck — preferably a fast one. He will take whatever he can get every time if it is above an unstated vanity minimum. That is, he asks high and expects to cut.

Third, there is the producer, your appointed representative, who deals with the agent on the understanding that the agent can promise the star's services by contract but cannot really guarantee an appearance. Stars get "sick" if they don't want to play a given date. And, illness (and other "acts of God") invalidate the contract. In such an event, the producer will scramble to get you another star, with mixed results.

Fourth, the industry places acts on "hold" while you and your counterparts decide whether to pay the price. Some agents refuse to honor the original "hold" if they get a better offer. In that case, your helpless but honest producer takes the rap. A questionable producer occasionally will accept a second or third hold on a star (not a ghost of a chance of getting that star) to get your name on the dotted line. Later he gets out by invoking a cancellation clause and substitutes.

Fifth, major name talent signs only 30-day cancellable contracts to leave them legally free to accept movie or tv contracts, which pay far more but require exclusive call.

Sixth, personal rivalries among entertainers treat asking-price as publicity but selling-price as status. Rivals will never accept less than the opponent got from you last year.

PUT IT ALL together and you get an industry which could easily total up a high and low price for each potential show package, plus a producer's margin of profit. Although a very few producers work on exactly that estimating scheme, the bulk of the industry stays with chaos because that chaos offers a chance for the quick buck. And you have come full circle.

You can protect yourself, however.

First, work only with a producer who offers you a cost quote which separates the various program elements by dollar amounts. For instance, two supporting acts estimated at \$300 to \$500 each; room decor, if any, at exact cost; stage and lighting effects and equipment, including sound and stagehands, if needed, at exact cost; an allowance for a star; say, \$1,000 to \$3,000 as your budget permits — not wide open; and the producer's own fee.

The orchestra is variable at union scale for the stipulated number of men with double pay for the leader. Again, talent asks more than union minimum.

Second, be willing to sign a contract with a reputable producer on the basis of his staging ideas, past successes, and skillfully chosen supporting acts, plus a list of a half-dozen stars presently available even if not on hold.

Give your producer latitude to bargain because you pay much more for the star you "demand" by name than for the same person you "accept" as the agent's suggestion. Besides, a star already in town for another engagement will often "double" at bargain rates to get the extra pocket money.

THE SYSTEM is sick, but merely saying so won't change it. Yet a bit of consumer pressure could. If you and your counterparts trade information on prices, performances and producers, it will be only a short time before prices stabilize. You can simply refuse to buy at the high end of the bargaining range.

When you find that uncommon producer who caters to your best interests, stick with him year after year, regardless of the city in which your meeting is held. Even then, don't confuse his ability to produce a good show with an ability to help you educate your salesmen in the business meetings. Same zoo, but different animal. Check him out separately, and go to someone else if you must.

Keep a sense of perspective. Not everyone shares your tastes — so it really doesn't matter whether Sally Smith or Sally Jones sings, and the price differential could be great. "Star" as we have used it here means a publicized main attraction, who usually makes records or frequent tv appearances.

Supporting variety acts are not necessarily inferior — sometimes they are sizeable talents who never got the big break. "Superstars" such as Bob Hope and Danny Thomas, work only in the high ticket range (\$20,000 or more) when they choose. They don't need the money, but they might appear in exchange for your hefty contribution to their favorite charity. Treat this group like people, because they are warm and considerate and never make preposterous demands. Maybe that is why they are ageless.

And maybe there is a moral there for the entertainment industry. ■

August, 1971

"Achieving Objectives In Meetings"  
**BANQUET SHOW BID COMPARISON GUIDE**

Meeting title: \_\_\_\_\_ City: \_\_\_\_\_ Date(s): \_\_\_\_\_

Name of Producer: \_\_\_\_\_

1. Dollar cost quoted: Low \$ \_\_\_\_\_ High \$ \_\_\_\_\_ All-inclusive [Yes] [No]  
 for [variety show] [book show] [semi-book show] [big band\*]

2. Size of group: \_\_\_\_\_ Cost per person: \$ \_\_\_\_\_

3. Which of these basics are included in this Producer's presentation:

- |                           |                                 |
|---------------------------|---------------------------------|
| \$ _____ Platform stage   | \$ _____ Hotel labor            |
| \$ _____ Lighting (fixed) | \$ _____ Union Labor            |
| \$ _____ Followspots      | \$ _____ Union musicians *      |
| \$ _____ Sound equipment  | \$ _____ Collapsible proscenium |
| \$ _____ Stage decor      | \$ _____ Dimmerboard            |
| \$ _____ or Hotel drapery |                                 |

SUBTOTAL BASICS: \$ \_\_\_\_\_

\*(Union musician minimums not applicable to Big Band.)

4. Which of these discretionary items are included:

Starring performers suggested:

- |           |              |               |
|-----------|--------------|---------------|
| (1) _____ | Low \$ _____ | High \$ _____ |
| (2) _____ | _____        | _____         |
| (3) _____ | _____        | _____         |
| (4) _____ | _____        | _____         |

\$ \_\_\_\_\_ avg.

Thematic components:

(a) decor for [stage] [tables] [walls] Low \$ \_\_\_\_\_ High \$ \_\_\_\_\_

(b) supporting acts suggested:

- |                             |       |       |
|-----------------------------|-------|-------|
| (1) _____                   | _____ | _____ |
| (2) _____                   | _____ | _____ |
| (3) _____                   | _____ | _____ |
| (4) _____                   | _____ | _____ |
| (5) Dance line: _____ girls | _____ | _____ |

THEMATIC SUBTOTAL: \$ \_\_\_\_\_

Rehearsal time for orchestra: \$ \_\_\_\_\_

Production fee: \$ \_\_\_\_\_

Allowance for costs not included in Items 3 & 4 above: \$ \_\_\_\_\_

**GRAND TOTAL FOR FLOORSHOW: \$ \_\_\_\_\_**

## IN SUMMARY

We've taken the meeting apart in this text to demonstrate that there is no mystery in, and no insuperable problem posed by, any component. When you are prepared to control the meeting, it cannot take control of you . . . neither can it cause you to deliver or lose control to persons whose interests are not compatible with your objectives.

Putting these parts together again is your task, but the job is simplified by the functional (committee) approach even if you do all the work yourself; and the results are safeguarded by the PERT mechanism. Success is highly predictable because it operates as the effect of a given cause.

Because the meeting is an event, it never exists prior to the unfolding, cannot be viewed as a complete entity at any point during its unfolding, and can be described but not recaptured after it is finished. Therefore, it really exists only in the mind of the meeting manager — validated by results.

It is the intangibility of the meeting which demands that its tangible elements be precise, compatible, balanced, and executed exactly as planned.

And it is the dependability of synergism which assures you that the meeting whole will be greater than the sum of its parts.

Throughout the text, we have worked with absolutes (always, never, only, etc.). You might choose to compromise, but be aware that any compromise increases your risks. Take as few as possible.

If for every meeting — regardless of size or cost — you think through all the pertinent items of meeting justification, and protect your decision with PERT, it is nearly impossible that the meeting not succeed.

This is not to say that PERT (or any other control system) can eliminate external accidents. Expect incidents . . . they're almost inevitable with so complex an undertaking. But a thorough understanding of the construct of the meeting eliminates oversights and reduces unfortuitous incidents from calamity to inconvenience. In short, you are prepared to deal with anything.

The plan dominates the event.

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who  
says  
meeting  
planning  
is  
a game?



**A**nybody who thinks he can create a perfect meeting by chance!

If you know meeting planning, you've realized that the likelihood of succeeding by chance is slim. The better way, obviously, is to take the first, right step.

Coordination is a precise and indispensable part of success. And Meeting success is a matter first of knowing what needs to be done. . . then of knowing how to do it. . . then of measuring results to validate the success. . . and building this feedback into plans for the next meeting.

Meeting success is a gamble if any one of these steps is omitted.

If you take the first step outlined — defining purpose — all else follows.



# perfect meeting in '73

Congratulations

LET'S HAVE A MEETING START HERE

Go to lunch with suppliers.  
**19**  
Advance to 54.

Establish preliminary agenda. If moving from 13  
**18**  
Advance to 24. If not move back 1.

Good.  
**17**  
Happy committee.

Call second committee meeting.  
**16**  
Vote assignments. Advance 1 space.

Call first committee meeting of volunteers.  
**15**  
Talk generalities. Advance to 17.

Secretary gets engaged, loses files.  
**14**  
Go back 7 spaces.

Establish preliminary budget.  
**13**  
Advance to 18.

Fill out a lot of forms and checklists.  
**12**  
Look busy.

Get brother-in-law. Can get it wholesale.  
**11**  
Advance to 54.

Phone hotels/halls for quotes. Verbal agreement.  
**10**  
on free services. Advance to 54.

Phone airlines for quotes.  
**9**  
Consider ski package at discount. Advance 2 spaces.

Phone producers for quotes.  
**8**  
Win free advice. Advance to 54.

Everything  
**7**  
checks out.

Take names of volunteers who want to help.  
**6**  
Advance 6 spaces.

Sign contracts with producer for multi-media show.  
**20**  
Advance to 23.

Sign contracts with facility.  
**21**  
Advance 2 spaces.

Sign contracts with airlines.  
**22**  
Advance to 23.

We're getting there.  
**23**

Inspect several facilities for first time.  
**24**  
If moving from 18 Advance to 29. If not throw again.

Call committee meeting.  
**25**  
Switch assignments. Go back 2 spaces.

Round up available speakers.  
**26**  
Popularity counts. Advance 2 spaces.

Call committee meeting.  
**27**  
Vote on speakers. Advance 1 space.

Gonna be a fun meeting.  
**28**

Outline specific message and pool meeting assignments.  
**29**  
Advance to 39.

Ask speakers what they want to talk about.  
**30**  
Advance 1 space.

Make slides for speakers with ready scripts.  
**31**  
Advance to 38.

Start building exhibits.  
**32**  
Advance 6 spaces.

Draw up firm budget based on estimates.  
**33**  
Advance to 38.

Airlines schedule changes.  
**34**  
Go back to 22.

Engineering department announces product change.  
**35**  
Go back to 30.

Stop work on slides. Kiss budget goodbye.  
**36**  
Change scripts. Go back to 30.

Facility remodels main hall.  
**37**  
Go back to 21.

It's falling into place.  
**38**

Call committee meeting. Specify assignments.  
**39**  
Advance to 42.

Hire local help.  
**55**  
Advance 2 spaces.

Airline rep. transferred.  
**56**  
Return to 22.

All downhill from here.  
**57**

Plan workshops. Produce materials.  
**58**  
Advance to 61.

U.S. dollar devalued. Panic.  
**59**  
Go back to 33.

On a par with last year at this time.  
**60**

Plan wives' programs, entertainment, free-time events.  
**61**  
Advance to 64.

Speaker dispute over idea ownership. Arbitrate.  
**62**  
Go back to 30.

Checklists inadequate.  
**63**  
Return to 15.

Call full committee control meeting. Check all details.  
**64**  
Advance to 68.

Local suppliers short on equipment.  
**65**  
Scramble.

New Committee meeting. Who's in charge?  
**66**  
Advance 1 space.

They told me it would be a snap.  
**67**

Production costs under budget. Cheers.  
**68**  
Advance 2 spaces.

Don't get so up-tight about it.  
**69**

Conduct all-staff liaison conference with facility.  
**70**  
Advance 1 space.

Conduct rehearsals.  
**72**  
Advance 1 space.

All materials and supplies arrive on schedule.  
**71**  
Advance 1 space.

First 100 years are the toughest.  
**48**

Name qualified speakers to program.  
**47**  
Advance to 49.

Engineering department wins delay argument.  
**46**  
Go back to Start.

Announce meeting and agenda.  
**45**  
Advance 2 spaces.

Let's get our bearings.  
**44**

Prepare mailers for announcement.  
**43**  
Go back 2 spaces.

Determine specific message and follow-through.  
**42**  
If moving from 39 Advance to 45. Otherwise back 1.

Next year we've got to get organized.  
**41**

Engineering department wants to delay meeting.  
**40**  
Argue. Wait one minute.

Nothing for nothing silly.  
**54**  
Return to Start.

Call full committee meeting to confirm schedules and accomplishments to date.  
**53**  
Advance to 58.

There must be a better way.  
**52**

Stage spectacular over budget.  
**51**  
Go back to 33.

Hotel sales manager resigns.  
**50**  
Go back to 21.

Take production quotes on message support materials. Contract for one.  
**49**  
Advance to 53.

Conduct all-staff liaison conference with facility.  
**70**  
Advance 1 space.

Production costs under budget. Cheers.  
**68**  
Advance 2 spaces.

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**12**  
Look busy.

Get brother-in-law. Can get it wholesale.  
**11**  
Advance to 54.

Phone hotels/halls for quotes. Verbal agreement.  
**10**  
on free services. Advance to 54.

Phone airlines for quotes.  
**9**  
Consider ski package at discount. Advance 2 spaces.

Phone producers for quotes.  
**8**  
Win free advice. Advance to 54.

Everything  
**7**  
checks out.

Take names of volunteers who want to help.  
**6**  
Advance 6 spaces.

Gentlemen: You've made a rather interesting claim. We would like to know more about your services. Please, call us for an appointment.

Name \_\_\_\_\_ Title \_\_\_\_\_

Company \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_

Participants arrive for a

Business Meetings  Convention  Incentive Program

Corporate Movement understands that secret. We help you to think, to weigh alternatives and select, and to implement the selections.

Only Corporate Movement can offer a comprehensive meeting service. . . because we understand you and your needs. We can coordinate details in your name. . . freeing you for the sensitive tasks and decisions which must be yours.

Our viewpoint is different. . . We want the coordination and program development responsibilities and all that it implies. We offer the services by which to create successful meetings everytime:

- Consultation
- Coordination and production of
  - † Message
  - † Media
  - † Transportation
  - † Facilities
- Post-meeting analysis

Our Personal Involvement in your plans and objectives — is the critical difference whatever our specific assignment. Request all or any of the services you need, as a comprehensive package or as single component.

Need proof? Take a chance: Roll a pair of dice against prospects for a successful meeting. The game is in the center fold of this brochure.

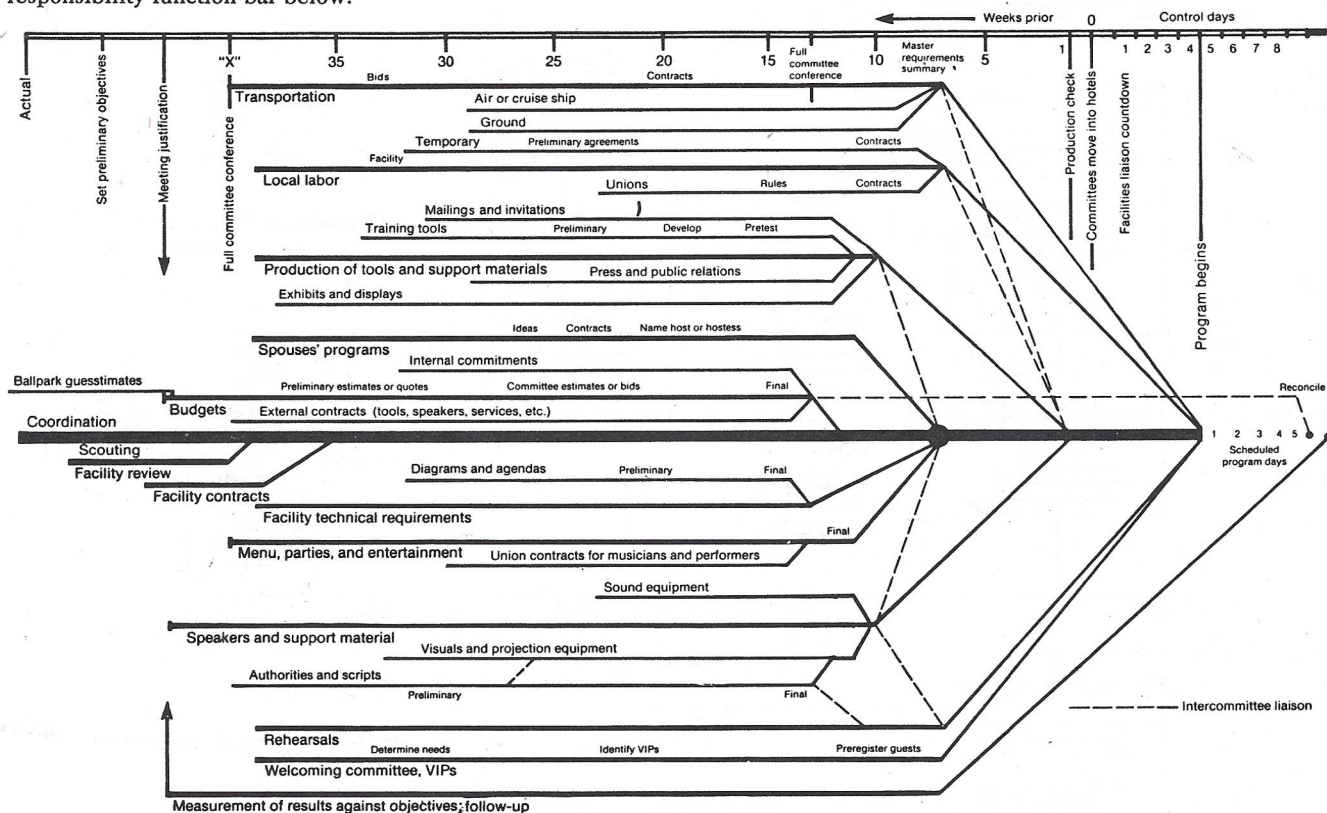
Play it now.

Then try it our way.



## Sales Meetings That Work Meeting/convention control (PERT) Diagram

Note: Hypothetical calendar; no attempt has been made to reflect actual time sequence in detail. To determine the calendar due dates for components of your meeting, refer to the *PERT Committee Guide & Report*, Chapter 15. Enter key dates on appropriate responsibility function bar below.



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