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IT'S ALL IN THE DETAIL

Meetings can be one of the most exhilarating parts of your working life, can increase knowledge, grow company profits, create new revenue streams, enhance brands, and provide the catalyst for change. Done well meetings bring people together to heighten communication and help create alternative, positive futures.

The flip side is that poorly organised meetings can undo much of the good work that has led to the creation of the meeting in the first place. Badly run meetings can tarnish a company's reputation, reduce employee satisfaction, and significantly eat into a company's profits.

The selection of venues, speakers, entertainment, dates and times can have a huge impact on the effectiveness of a meeting. So too does the application and use of technology. (Who hasn't attended a meeting where the sound was terrible and the presenter's PowerPoint presentation mundane?)

If you have been placed in charge of organising a meeting for your company or association and have had little experience in doing it, or perhaps you haven't done it in a while, then this booklet is designed with you in mind. Certainly it does not purport to be the be all and end all. As the name suggests, it is a guide - a roadmap if you like - aimed at helping you work through what can be one of the most fulfilling and creative activities of your working life.

Use it, scribble on it, and once you've got a few successful meetings under your belt, file it away or pass it onto a colleague who, like you, maybe isn't exactly sure where to begin.



A handwritten signature in black ink that reads "Brad".

Brad Foster
Editor

I'm a great believer in luck, and I find the harder I work the more I have of it.

Thomas Jefferson (1743 - 1826)

THE BASICS

If there is one truism about organising meetings it's that while nobody may notice when you get everything right, everyone will certainly notice when things go wrong.

While there are some aspects of arranging a meeting that cannot always be controlled, a common sense, methodical approach to planning remains the best defence against Murphy's Law.

For starters, make sure you know the following:

- Name of client company, organisation or association.
- Full address, including fax, telephone, email and website addresses.
- Full name and title of meeting planner and any other main personnel contacts within the organisation. If you will be liaising with more than one person within the company, it is important to have a clear understanding of their individual roles and areas of responsibility in terms of organising the meeting.
- What are the preferred days and dates for the meeting? Have a second and third choice of dates prepared as a backup.
- What are the AM/PM commencement and finishing times for each day of the meeting?
- Do the preferred dates clash with holidays or any major sporting, political, and religious or cultural events in either your home city or the city that will host the meeting?
- Establish registration cutoff date – allow for any last minute rise in numbers.
- What are the objectives of the meeting? For example, is its primary function to educate, reward, motivate or entertain? Does the meeting have a theme? How will that theme be reflected and reinforced in the program?
- Who will be selecting topics and deciding on sessions for the meeting?

"Anticipate the needs of your organisation even before they do. Make sure the venue has enough meeting space for your needs and develop a good working relationship with the venue".

– Stephanie Blower, Conference Organiser, Sydney



VENUE REQUIREMENTS AND SELECTION

Nothing is more critical in setting the tone and mood of your meeting than the venue. Where you choose to hold your meeting makes an immediate statement about your organisation and the level of importance you place on those attending.

It is vital that the venue compliment the type of meeting being organised. Rewarding top sales executives with a weekend in an inner city hotel is not likely to offer much incentive. Similarly, a tropical hideaway would be an unlikely venue for a shareholders meeting.

- Is the venue within the meeting's budget?
- Does the venue reflect and compliment the meeting's objectives and theme?
- If applicable, are the room rates affordable to the majority of delegates?
- How does it compare with previous venues used by the organisation?
- Is the venue accessible and conveniently located for the majority of delegates? If the meeting is to be held locally, is parking readily available onsite and how much does it cost? Can the venue be easily reached

by public transport or taxi? Are they able to assist with transfers if required? Are there regular scheduled flights in and out of the area for those delegates coming from further afield?

- Is the venue located in a region where delegate security may be an issue? This is a particularly important consideration for groups meeting in an offshore location.
- Is the venue willing and able to provide onsite security to your satisfaction? Will they allow additional security from outside the hotel to work onsite if necessary? Can they offer any additional protection for your VIP's, chief executives and other high profile attendees?
- Does the venue offer the appropriate number of meeting and accommodation rooms? Are they of a standard appropriate for your group? Do they offer adequate exhibition space?
- Is on-site catering available? Does it match your catering budget?
- Is the venue willing to negotiate on price?

VENUE REQUIREMENTS AND SELECTION

- Does the venue charge for function room hire and if so, how much? Will they be willing to reduce or drop the room hire charge in return for accommodating your group?
- Does the venue offer adequate VIP facilities and hospitality suites?
- Is the audio-visual equipment onsite adequate for your needs? How much does the venue charge for AV hire? Is there any onsite technician? Does the venue offer video conferencing facilities and Internet connection services? Do you need an internet café and is this possible at the venue?
- Does the venue have a dedicated on-site convention services manager and who is that?
- What are the convention services manager's contact details?
- Who is to be contacted in the event that the convention services manager is unavailable and what are their contact details?
- What does the venue offer in terms of handicapped facilities?
- Are the meeting rooms sufficiently quiet and private? For instance, if another group was to meet in the adjoining room simultaneous with your own, would the noise be a distraction?
- Is the hotel planning any refurbishment or construction work at the time of your event?
- Are there sufficient recreational facilities within the hotel: casino, day spa, and tennis courts, etc? Does the surrounding area offer sightseeing and recreational attractions of interest to your group?
- What type of restrictions does the hotel place on check-in and departure times and how will this affect your meeting schedule?
- Will you need to organise airport "meet and greet" or airport transfers?

PUBLICITY, PROMOTION AND ADVERTISING

The vast amount of information and advertising we are bombarded with each day means that, for the conference planner, getting the message across about your meeting has never been more difficult.

Attracting sufficient numbers of the right people requires a co-ordinated and creative marketing approach. Consider "teaser" campaigns, Internet promotion and advertising, and eye-catching brochures and mail outs to stand out from the crowd. Planners dealing with "in-house" corporate or association meetings can't afford to rest on their marketing laurels either.

Economic uncertainty and a competitive business market mean that even usually "reliable" attendees may need a little convincing next time around.

- Is your mailing database for potential delegates complete and current?
- Who will be responsible for the mail out?
- What are the dates for the first, second and third mail outs to commence? Will any further mail outs be necessary?
- Are "teaser" campaigns needed? If so, when should they be launched prior to the first mail out?
- Will post-conference feedback and evaluation forms be handed out at the end of the conference or will they be mailed at a later date? If they are to be mailed, when?
- Do you have the email addresses of potential delegates? Will an internet mail out also be required?
- Have all necessary procedures been adhered to regarding the Privacy Act?
- Have meeting details been placed on the organisation's website? Is there a need to design a dedicated website for the event? Who is responsible for regularly updating the website?
- Are advanced copies of major speeches and presentations necessary?

PUBLICITY, PROMOTION AND ADVERTISING

- If necessary, your media contacts list up to date? Who is responsible for keeping the media informed in the lead up to your meeting and liaising with them during and after the program? Don't neglect to check the willingness and availability of any high profile delegates or speakers to speak with the media before sending out press releases and invitations.
- Does your venue offer a dedicated pressroom?
- Do you need to organise a press conference for a major speaker? What about the possibility of radio or television interviews?
- Have you organised an official on-site photographer?

A clear understanding of each party's obligations and responsibilities goes a long way to ensuring repeat business – the clearest of all accolades. An organiser must show a great commitment to the success of any event, demonstrating real personal commitment and passion.

- Bryan Holliday, Director ICMS Australasia



REGISTRATION AND ATTENDANCE

Ticketing and delegate registration are two areas that have undergone enormous technological changes in recent years.

The internet is now seriously challenging paper-based systems as the preferred registration option for many delegates, while advances in magnetic strip, bar code and microchip technology have lead to a plethora of "smart cards" able to identify and store valuable attendee information.

- Do you have a firm idea of the total number of delegates expected?
- If required, all registration need to be pre-paid or will payment also be accepted onsite?
- Type of ticket or badge to be issued to registered delegates? Will this be mailed to delegates prior to the event or picked up onsite on the day?
- If applicable, have you established what price options you will offer delegates i.e.: separate price arrangements for half day, full day or individual session attendance?
- Will you be offering an online registration service? An efficient online registration package should include the description of the meeting, downloadable registration form and data storage capacity, automated email responses and communications, and online security. Online registration information is often best linked to the organisation's existing website.
- Do you require "smart card" identification badges for registered delegates? Especially useful for exhibition registrations, these not only contain all of a delegate's relevant contact information but can also be used for "tracking" a delegate's movements and areas of interests as they move throughout a trade or product display.

REGISTRATION AND ATTENDANCE

- If applicable, have you established and communicated a clear re-admission policy?
- Have you established a method of payment system for on-site registration payments including Eftpos, credit card and cheques?
- If applicable, have you established a policy on accepting cheques?
- When establishing an onsite registration desk ensure that you have the area well signed and in an accessibly position.
- If applicable, have plenty of small change at the ready, and organise for larger amounts of cash to be periodically removed and safety stored throughout the registration process.
- Is there the need for a Message Board for delegates? Where will this be situated?

Firstly you must confirm the value of a supplier by checking their 'testimonials' personally. Most reputable suppliers will go out of their way to ensure you are happy but they are not 'mind-readers'. Careful and finite briefing is simply a 'must' for the result you seek. You just must confirm EVERYTHING in writing! Remember to ask for something new and innovative no matter what you are wanting.



- Paul Jensen, Consultant, Sydney

PERSONNEL

Your staff are the human face of your meeting. While a dull speaker or a tepid bowl of soup might be easily overlooked, delegates are unlikely to forget rude, incompetent or disinterested personnel.

Take care to select staff that can demonstrate the appropriate “people skills” and ensure permanent and casual staff are fully briefed on your expectations.

- How many staff will be required for the event?
 - How should staff address delegates? What is the policy on staff mixing with delegates?
 - It is vital that all staff - both permanent and temporary - are fully briefed on their role and responsibilities throughout the event. It is equally important that staff entrusted to a decision making role are aware of that fact and that a clear hierarchy of command is established.
 - If temporary staff are needed, where will they be sourced? Newspaper advertisements, Centrelink and employment agencies are all viable options. Remember to budget for the fees that apply to staff secured through a “temp” agency.
 - Who will be responsible for hiring/contracting, and paying temporary staff?
 - If temporary staff from outside the company are required, what is your policy on rates of pay?
 - Have you established a policy on overtime?
 - How many hours each day are staff expected to work?
 - Who is responsible for timekeeping of working hours?
 - Are staff adequately trained for their role?
 - Have staff parking facilities been organised?
-

MEETING AND ACCOMMODATION ROOMS

Spending a day stuck in an airless, overcrowded meeting room followed by a restless night on a lumpy hotel mattress is nobody's idea of a good time. With so much emphasis placed on developing budgets and program design, it is sometimes easy to overlook basic but vitally important areas such as room selection.

- How many sleeping rooms will be needed?
Single, double, suites? Non smoking?
Smoking?
- Hotel room rate? Remember not too choose a venue where the rate will be too expensive for the majority of attendees. Does it include breakfast?
- Do you have the arrival dates and approximate times of all delegates?
Departure time? How do these correspond with the hotel's check in/out schedule?
- Will any early checkins be required for international delegates?
- Have you made arrangements with the hotel for "no-shows"?
- Location and room numbers of confirmed rooms?
- Have you established a set time for rooms to be ready for arriving delegates?
- Will the hotel be able to cope effectively with "mass" check in/checkouts by delegates?
- Does the venue have a dedicated group check-in area for ease of access?
- In terms of meeting rooms, how many will be required and what will they be used for?
- What is the approximate size, shape, length and seating capacity of each room?
- What configuration do you require for rooms?
U-shape, Classroom, Cabaret, Theatre?
- Tiered seating available?
- What type of furniture or décor will be needed?
- Is an additional display area required?
- Do you need staging equipment?
- If ISDN lines are required can they be installed? If so can the cost be provided?
- Will notepads, pens, water and mints be provided?
- Does the room have adequate power outlets for presentation equipment?
- Is the room air-conditioned, or does it have

MEETING AND ACCOMMODATION ROOMS

windows that can be opened?

- Are the door openings wide enough for equipment to be put into place?
- Does the room have space for coffee break or registration services if appropriate?
- Is the room sufficiently separated from adjoining meeting rooms?
- When will the room be available?
Will another group be using the room immediately prior to your event? Will the room be presented in an orderly fashion?
- Can equipment be set up the night before or several hours prior?
- Immediately before the meeting commences ensure that the seating plan is as specified and all equipment in place and in operational order.
- Are electrical fixtures operating?

- Have directions/signage to the meeting room been posted clearly?
- Are the delegates' views of the speaker unimpeded?
- Is a member of staff ready to act as a door person?
- Are exit points and toilets clearly indicated?
- Is the room temperature satisfactory?
- Is there sufficient space between chairs/tables?
- If appropriate, are place cards and other tabletop décor in order?
- Check for competitors over the same period.
- Is 24 hour meeting room exclusivity available?

Read the fine print, understand the ability of your client to deliver your promises and be honest, do not embellish. Get it in writing! Keep in touch and alert the venue to any changes in the perceived outcome. Grow good relationships!

– Roslyn McLeod, CEO Tour Hosts



AUDIO VISUAL REQUIREMENTS

Audio-visuals provide the “showbiz” element of your speaker and entertainment program.

While most planners will use the services of either an in-house or outsourced a/v specialist, it remains important that you have a basic understanding of equipment requirements and function.

- Decide what equipment will be needed. Standard equipment for the majority of presentations should include a 35mm slide projector, LCD or plasma projectors and screens for PowerPoint presentations, a DVD, VCR and necessary sound equipment.
- Does the room have enough power outlets for equipment?
- Is video or teleconferencing equipment

required and if so who will organise this?

- Immediately before the event, ensure all equipment is in working order. Ideally, check all ancillary equipment such as audiotape and microphones a day out from the event in addition to the last minute check.
- Check the room for acoustic dead spots or echoes by clapping hands sharply.
- Is your viewing screen at the right distance and level to the audience?
- Is the lectern at the right height?
- Are stage lights correctly placed for presenters?
- Is there the requirement for additional lighting?

Think about your event venue in terms of every element you want to fill it with and how people will react to them. This will determine the extent of your technical and creative support. Keep your speaker's presentation material (words as well as pictures) clean and simple – less is more. Always allow for set-up and rehearsal time.



- Nic Allum, Staging Connections

AUDIO VISUAL REQUIREMENTS

- Expect people to come and go during the presentation. Is light from the exit doors prevented from hitting the screen?
- Are presenters familiar with microphones, projector controls etc?
- Have equipment, light and curtain operators all been fully briefed?
- Do all necessary personnel have a full copy of the presentation script and running order?
- Estimate how many people will be in the room and how long you expect the meeting to last.
- Will air change sufficiently with doors and windows closed?
- Will temperature remain comfortable?
- Have all heating, air-conditioning and fan controls been tested? Are these individually or centrally controlled?

FOOD AND BEVERAGE

What your delegates eat and drink is a major contributor to their frame of mind, and therefore ultimately, to the perceived success of your meeting.

By offering a wide variety of choices and keeping the emphasis on fresh and wholesome dishes, you should manage to please the majority of palates.

- Compile a complete list of all meals and other functions where food and beverage will be served. When will these meals be held? At what venue?
- Consider cuisine choice carefully. Avoid too many highly spicy or heavily flavoured dishes, as these may not be pleasing to all palates. Ensure that your menu selection offers variety.
- Consider religious or special dietary requirements. Ask delegates to notify you of special food requirements, in particular food allergies, at the time of registration.

Always study your guest list when planning your menu. Age, sex and culture should all be taken into account to ensure that the food appeals to your guests. A little bit of research and a touch of innovation will help make your event a winner.

– Detlef Haupt, Sydney Convention and Exhibition Centre

- At cocktail functions, ensure the finger food served can be easily eaten with one hand.
- Be clear on the number of persons to be served and the price per head. Ensure that the venue provides you with a cut off date for adding or removing names from the guest list.
- Avoid serving alcohol at working lunches. Aim for a lighter lunch to keep delegates focused on the rest of the day!
- Decide whether you will offer a full or limited bar service and for what length of time. Ask the venue for a selection of beverage package options.
- Designate one person who is responsible for ensuring the bar is closed at the appointed time.



SPEAKERS AND VIPs

High profile speakers, MCs and invited guests can lend considerable drawing power and prestige to any meeting.

With this fact in mind, it is important that your special guests be treated accordingly.

- Ensure that speakers have been fully briefed on meeting objectives and themes. If using a professional speaker, be certain that they have "tailored" their address to your meeting.
- Have you considered utilising the services of a professional MC to assist in the smooth running of the meeting?
- What special hospitality arrangements have been made for speakers and VIPs - ie: airport pickup, hospitality suites, theatre tickets, and gifts?

- Have speakers been sent a full copy of the conference program?
- Do speakers have a running sheet of the meeting?
- Have VIP's forwarded a list of personal preferences and requirements in terms of food and accommodation?
- Will additional security be required for high profile special guests?
- Will media interest in the VIP present any security or privacy issues?
- Will hospitality be extended to VIP partners and/or entourage?

Having a comedian for 40 minutes over dinner entertains people for ... well ... 40 minutes over dinner ... but if you want your conference delegates to be looked after all day, each and every day of your event, a good MC will do that for you ... often for the same cost or less than a guest speaker.



– Darren Isenberg, impact entertrainers

ENTERTAINMENT

From standup comedians to acrobats, corporate impersonators to torch singers; the choices of meeting entertainment are virtually limitless.

No matter what the meeting, the same basic ground rules apply. Always ensure that the entertainment is appropriate for the audience demographic, and make certain that you or someone whose opinion you trust, has seen the act performed in front of an audience previously.

- Decide what style and type of entertainment is appropriate for your event. How does it reflect or support the conference theme?
- Consider your audience - will children or families be present?
- Does the venue offer appropriate dressing and rehearsal facilities?
- If using recorded music, has a public performance license been obtained?
- Will guests require an entertainment program?
- How many acts will be booked and how long will each segment last? A variety of performers is usually the safest option for a large audience.
- Before booking a performance, make every attempt to see them on stage first.
- Does the venue have a sufficient stage area and A/V facilities?
- Are the stage wings sufficiently wide enough for the performers to wait in or props to be stored?
- Has a staff member been designated for liaising with entertainers both prior to the event and during the show?
- Have meals been organised for entertainers and staging crew?

EXHIBITIONS

Exhibitions are often the financial lifeblood of a conference. Exhibitors are entitled to expect significant effort is made that the delegates have sufficient opportunity to walk the aisles and that the profile of the event coincides with their business objectives.

A careful program of promotion of the exhibition should be developed by organiser and exhibitor alike and the exhibitor be given a comprehensive history of the event.

- Make sure you have a plan of the entire exhibition area, including entrances, obstructions, emergency exits etc.
- Have a plan for every exhibit including its use and full dimensions.
- Will the venue floor be strong enough to withstand the weight of each exhibit and the total event?
- Is the ceiling height sufficient for the tallest exhibits?
- If required, are access points sufficient for wide loads and large machinery?
- Are items such as plants and animals allowed to be exhibited within the venue?
- How noisy will the exhibit area be?
- Has an overall colour and décor scheme for the event been decided?
- Have all legal arrangements, including insurance, been finalised?
- Has every exhibitor been assigned a location and identifying number?
- Are security arrangements in place for the protection of goods and personnel?
- Have all exhibitors received a list of exhibit rules and regulations, as well as set up and break-down dates?
- Are cleanup arrangements in place?
- Ensure all rental equipment is returned promptly.
- Has a briefing meeting been confirmed prior to event?

SECURITY

Security risks for groups fall into four broad categories - natural disasters such as fire, flood or earthquake, illness or physical injury, theft or loss of valuables and terrorist activity.

By developing clear and concise emergency protocols and ensuring staff are fully briefed and well trained, organisers can minimise the disruptive impact of unexpected events.

- Provide all staff and volunteers with a shortlist of emergency numbers. They should also receive further written information about emergency transportation and evacuation procedures.
- Staff should be fully briefed on any VIPS who are likely to attract media or public interest.
- Is hotel security adequate? If not, can you bring your own security personnel into the venue as backup?
- Hold separate security meetings where all staff and volunteers are involved. During these meetings, protocols for dealing with robberies, public protests, natural disaster and terrorist attacks should be formulated.
- Ask every attendee at the time of registration for a name, phone number and email address to contact in case of an emergency. This enables quick notification of relatives in case of an emergency.
- Registration forms should contain a list of all known allergies and medical conditions. This information could also be placed on the back of delegates' name badges.

SECURITY

- Make it a requirement that delegates show a photo ID to pick up conference materials at registration.
- Find out what the venue fire alarms sounds like and pass this information on to delegates.
- Consider whether VIPs and company executives should all fly in one plane to your event. Review company policy maximums.
- Know where all fire exits and extinguishers are located within the building and pass this information onto staff.
- Develop definite policies on out of hours admission to the venue and the removal of items from the building.
- Be certain your insurance coverage is comprehensive. As well as general information on your meeting many insurance brokers now require a Risk Management Assessment Plan to be included in applications.
- Set up a lost property office.

Make sure you discuss signage opportunities with your venue early in the piece. It's important to have your branding in the right places to avoid confusion amongst guests, so don't leave it to the last minute.

– Helen Mantellato, Sydney Convention & Exhibition Centre



RECREATIONAL AND SOCIAL PROGRAMS

The importance of recreational facilities in determining venue will obviously vary according to the type of event being held. While a pool and a gym may offer adequate leisure options for a two-day corporate strategy session, it would be woefully inadequate for a group of delegates also being rewarded .

An often-neglected part of the planning process, social programmes should be designed with creativity and a sense of fun in mind, whilst still allowing plenty of scope for interacting with the main conference schedule.

- ❑ Ensure your chosen venue has plenty of leisure facilities such as a gym, spa and tennis court.
- ❑ Utilise local attractions and restaurants outside the hotel occasionally - this offers delegates a change of scenery and a different perspective.

- ❑ Ensure the location of popular and safe local nightspots as well as regional attractions are advertised throughout the event.
- ❑ Organised golf or tennis days will be appreciated by some delegates and will add networking and group bonding.
- ❑ Before developing an accompanying persons programme, research the demographics of this group and their likely interests
- ❑ Consider organising special speakers and entertainers just for partners.
- ❑ Shopping trips and sightseeing are always popular options.
- ❑ Involve partners in the conference by inviting them to participate in designated workshops, plenary sessions or evening functions.

Always wear clothes with a pocket for a supply of business cards and lipstick. With frantic running around, a handbag becomes an impracticality and a hindrance.

- Lynne Schinella, Ripe Strategies



BUDGET AND ACCOUNTING

Finding a balance between the expectations of delegates and the realities of budget can sometimes appear an almost impossible task.

The best budgets are those that are fully and clearly established long before the event begins, rather than daily-on-the-run adjustments during the event itself. The following areas are mandatory considerations for any event budget.

- Publicity, promotion and advertising costs
- Personnel rates and costs
- Accommodation rooms
- Meeting rooms
- Food and beverage
- Hired equipment
- VIP expenditure
- Entertainment
- Prizes/awards
- Security
- Recreation/tours/spouse program
- Exhibit and freight costs
- Transportation costs of both people and freight
- Phone, mailing and internet costs
- Insurance
- Petty cash
- License fees
- Gratuities
- Taxes
- Surcharges

Expenditure should be recorded and tabulated on a daily basis. Arrangement for deferred payments should be made well ahead of time.

BUDGET AND ACCOUNTING

10 Tips for avoiding budget blues:

1. Your most valuable tool at the outset is a copy of last year's budget and actuals - get your hands on a copy.
2. Make sure your budget is realistic and well understood and signed off by the client.
3. Regularly update actuals and make revisions where necessary as you progress - your budget is a living document, not for the shelf.
4. Leave some fat in where you can - it never hurts. Just because it's in the budget, doesn't mean you HAVE to spend it.
5. Don't forget a contingency - agree to a percentage of the total.
6. Avoid hindsight accusations of negligence and don't forget insurance.
7. Make those breakeven numbers and sponsorship income achievable - ambitious targets, which are fine, but something else entirely.
8. Get all quotes in writing and study contract fine print
9. Watch for blow outs e.g. extra security costs, last minute AVV requests, venue surcharges.
10. Event organisers hate surprises, especially ones that cost money - constantly recheck that all line items are accounted for in your budget, and watch that no-one else is running up event bills on your behalf.



- Elizabeth Rich, Agenda, Sydney

