

## Preface to the Third Edition

Because of the advent of two-way video conferencing, the world of corporate meetings will change drastically. Site-dependency will end. The change will not be made overnight. It will be made in the face of protest and stiff competition from the hotel and airline industries (which until now had absolute access to and control over the people moved for the purposes of better internal communication) and from other suppliers who profit from service to crowds. Disinformation in their interests and service probably will not end, but probably will become rampant. Their interests will not always (or often?) coincide with yours.

The immediate consequence of any video conferencing substitute for travel is that the emphasis will be back on the meeting purpose and content—where it has always belonged! Rather than being tied up with details of distant planning, Corporate Meeting Managers will now be free to specialize in the subject matter which concerns the given corporation, rather than in the stringencies of the travel trade and subsequent planning for the distant event. For purposes of control, the outside facility across the road should be considered *distant*. In the past, distant sites were inescapable; but now, escape is easy and cheap!

*Sales Meetings That Work* will help you in four main ways:

**First**, you will understand the needs and get the help needed via proved methods of control! The methods of meetings control contained in this book were the first comprehensive system in the meetings/ conventions industry. Having been imitated and reproduced, the original materials in this book have become The Source for knowledgeable, hands-on expertise for the entire meetings/conventions industry. Forms are easy to imitate—but we know the reasons that they were designed! And *Sales Meetings That Work* tells you those reasons. The several

associations in the meetings field did not originate how-to materials. They did consolidate existing opinions that might or might not be qualified.

**Second**, this book will enable you better to control the hotels and other distant suppliers while you fulfill the future contracts that are likely in hand for hotel space. You might want to cancel. But if you must still meet at a distance in the near future, you can at least be better prepared by consulting The Source materials here for meetings control.

**Third**, when you have ceased to be site-dependent, you can ignore the book chapters devoted to distant site control and concentrate on those related to content—your company’s message. The Source for control was also The Source for identifying that dichotomy of interests. In the entire industry, Audience and Training Profiles (among other guides) originated with us. Sites are usually not your reason for calling the meeting...unless you’re selling sites.

**Fourth**, the brand new materials in this book deal very specifically with the approaches to video conferencing that still affect you more than 15 years after our early recommendations appeared. And new materials in the all-new Chapter 23 will help you to understand the distortions and outright disinformation already being practiced by what we call the Pollyanna Press of the meetings/conventions industry.

Those were the main points when this edition was prepared. Because of September 11, 2001, there’s a whole new array of considerations; and among them are:

a) business must continue to communicate, whether or not in a central meeting room;

b) if air travel is no longer the joy it was in the days of the French Caravelle, then attendees will likely be frazzled before they begin the meeting: do you prefer extra days out-of-office routine in order to allow a calming down once there, or do you prefer them not be out of office routine at all?;

c) if the employee would rather not fly, what liability does your company incur if it insists and if something untoward

should then happen? “Do you like your job?” is a holdover from KITA management days, and it’s still destructive. Now you decide.

d) equipment available now will connect multiple locations for “live” interactive conferences or for computer-aided lessons...purchased for under \$3,000 per connected site., plus the price of a phone call, on DSL or other broadband.

As a matter of simple fact, it’s essential to recognize that an annual meeting is legally mandated to all industry associations by law. Large and showy exhibits help to draw members to the event, where business matters are often sparse in discussion. Election of officers and a light pass at key issues usually suffice. Does that describe your intent? If not, why practice their dictates?

The legal needs of any association are not yours in the sales or training room! The nearest that corporations can come to association legal needs is the annual meeting of stockholders—once each year. If your needs go beyond that specific event, then you have no “event” needs that can detract from the main message!

So rebel. Refuse to be dissuaded from concentrating on your message by persons and organizations whose interests are not compatible with yours. You will come to understand the thrust of the original slogan given to the industry by the title of this writer’s previous book, *Achieving Objectives in Meetings*. When you have your purpose firmly in mind, you will be in control! Finally!

The author owes special thanks to Paul Zeissler and Becky Michael-Zeissler, a suburban Chicago team of writer/editor and fine-and commercial-artist, who were willing to shoehorn a Word Perfect 5.1 author into a contemporary software’s real world.

## Preface to the First Edition

If your responsibility for planning and managing meetings is less than a full-time assignment, this book is for you. It offers both the general theory and the specific practices you need to master any meeting-related problems you might encounter, from stating objectives to preparing agendas, from selecting facilities and media to actual production of the event.

Our step-by-step methodology will guide you to the right decisions whether you are a beginner or relatively experienced. The full-time corporate or association meeting planner will find a totally integrated system of meeting coordination which can yield near-perfect control. Although the references and examples are expressed in sales management terms, the practices are universal...applicable to any meeting of any size for any purpose.

Management control achieved through analysis and understanding of every element of the program is this book's unique viewpoint. It optimizes group communications by requiring a complete, clear message to be presented, together with all required tools, through media appropriate to both the message and the selected participants. Only that structure yields a *valid* meeting which has a right to succeed.

Only the achievement of objectives (objectively measured) constitutes success. Achieving instructional objectives and larger corporate goals through properly managed meetings was the concept/methodology which our *Achieving Objectives in Meetings* contributed to the industry. That book was widely credited with introducing the first integrated system for management control in the trade. Those who disagreed claimed that system was prefigured in some elements of a 1967 ringbinder text published by Dartnell over a JJK Company signature. Both groups are right: We created the pertinent materials in that aggregate ringbinder.

So the concepts and methods of the present book were developed in exact parallel to professionalism in the meetings and conventions trade. Five distinct phases can be traced:

**First:** As meetings and conventions became major events during the 1950s, member groups of the American Society of Association Executives struggled to bring manageability to meeting planning. Each association and each hotel had its own methods, and nothing was standard. Good meetings happened at great expense in time, temper, and hazard. Trial and error was the development mode.

Because third-party meeting production assistance was not then available, two leading groups, the Linen Supply Association of America and the Steel Service Center Institute, asked their producer of banquet entertainment, United Attractions of Chicago, to take on the job—to assist their respective staff convention managers. So in 1960 the convention coordination consulting function was born; and we (of sales development, not theatre, background) became a co-originator of these methods. They were developed by common sense and serendipity and were proved in action over the next half dozen years with an increasing number of adherent clients. These included the American Dairy Association, the American Gas Association, the American Meat Institute, the National Coal Association, and the Railway Progress Institute.

The technical precision of those programs became the ASAE standard; and a corporate client, Mobil Oil Company, was winning petroleum industry awards for the quality of its dealer conventions.

United Attractions' own sales pitch became: "The convention week is 2 percent of the participating executive's year—can it pay its way?" Cost-effective thinking is now new; it's simply a neglected idea whose time has come.

In entertainment for conventions, United Attractions originated the "themed" evening (with band, supporting acts, and appropriate stage backdrop at a flat fee, plus the clients' choice

of star headliner at cost)—popular with buyers everywhere today.

**Second:** In 1966, Dartnell took a survey of its corporate subscribers, intending to market a composite ringbinder of tips and recommended methods from the field. We interpreted the questionnaire responses and evaluated respondents' "best meeting" entries. Although some individual meetings were quite good, the methods reported were so fragmented and rudimentary as to be virtually unusable. So many respondents' questions pertained to planning and participation that we wrote in the summary sent to respondents, "Not all meeting leaders are achieving satisfactory results by their present methods." Books already on the market were discursive and tips oriented; they offered few techniques beyond cosmetic seating diagrams.

Therefore, we provided basic *technical* controls for the 1967 ring binder as previously developed for the associations. Cautions offered in the ringbinder include, "Meetings need goals if they are to have a direction, and management needs tools by which to measure the results if management wants to control," and "The key element of every meeting is communication." By the early 1970s that terminology had swept the meetings trade; but only slowly were the words being converted to deeds, despite the fact that our guides (Balance Sheet, Master Requirement Summary, Countdown and Hotel Liaison Checklists, and Audience Interest Evaluator) were so widely imitated as to become generic.

**Third:** In 1970, at the height of the McLuhan era's "The medium is the message," we argued that the message is the message—and the medium can kill it. The first article appeared in Crain's new-defunct *Advertising & Sales Promotion* magazine and became a regular column, "Cavalier on Meetings"; a switch to *Sales & Marketing Management* magazine produced a total of over five years of columns arguing for professionalism in planning. That demanded precision in planning and production,

fiscal responsibility, adult education techniques, plus standards and ethics—much to the consternation of industry suppliers.

The controversy provoked was perfectly timed to welcome (a) the birth of the meeting planner movement (the first convention conceived and produced by a one-time co-worker at United Attractions) and (b) publication of the ASAE's Hotel/Association Facility Contract (1972) which the convention press somehow overlooked.

**Fourth:** In that time of radical change, *Achieving Objectives in Meetings* was published (1973). Its methodology was augmented by the originator's rationale—in fresh text and reprinted columns: a why-to-do-it for the corporate meeting planner. The few ringbinder guides were augmented with a dozen others, all correlated to yield content/message control and protection. It included the industry's first PERT diagram to tie all the mechanics together. Because the ASAE permitted us to reprint its new contract, all the mechanics for total technical control were finally located in one book: a system!

What was new to the field in *Achieving Objectives in Meetings* was an effort to create the *message* context which the meeting format supports. That included group and mass communication techniques, adult education, sales training and sales promotion, humanist psychology and human resources management, and the deficiencies of the meeting suppliers. The context was presented by reference in a span of only 19 pages. It was not a book for beginners, and the introductory material said so. Reviewers in marketing publications praised the context and asked for more; the convention industry press suggested that it meant nothing. Our viewpoint was validated with Meeting Planners International adopted the book as a membership-drive premium and Denver's Metropolitan State College (the nation's first college credit course in meeting planning) bought multiple copies.

The book's concept itself went generic: the assigned title of a tenth anniversary MPI convention address delivered by the

author in December, 1982, was "Achieving Objectives in Meetings."

**Fifth:** The present book is a direct response to the needs of the legion of sales managers and other marketing executives at all levels who occasionally plan and execute major meetings. Fewer than 2,000 companies have full-time meeting coordinators, although over 11,000 companies employ more than 1,000 persons each, and 70,000 more employ at least 100 persons. All these managers and supervisors need dependable assistance, and we believe this book provides it.

The proved methodology of Part II has been totally reorganized so as to present detailed how-to guidance even a neophyte can feel comfortable with; it provides a refresher course for the more advanced. Then, to provide a solid grounding in the relevant social sciences, the context and theory of Part I was expanded...fivefold! You can now understand how and why each decision is made and implemented as you construct a valid meeting. Now you are prepared to take charge of every function and to manage every contributor and risk, whether you alone or a company committee or outsider consultants are involved.

Because this book deals in concepts understood rather than in rote performance, you can adapt every practical program element to your exact and changing needs, now and in the future. Because of the recent entry into this field of directories published by the Bowker Corporation and Gale Research Company, you are freed from the fads and disinformation common in advertiser-dominated magazine directories of facilities and other suppliers.

Given theoretical grounding, practical mechanisms, and unbiased information sources, you can *control*. You can help your meeting participants and yourself to grow...to achieve your meetings' objectives and your corporation's goals...with humanity...every time! That's the mark of the professional; and

the meetings industry needs professional, even among its part-time practitioners.

When you have succeeded in your meeting, we will have succeeded in our book.

A number of other will have contributed to those successes: Louis Haugh, then editor of A&SP, and Robert Albert, senior VP/Editor of *S&MM*—both for their courage in publishing views often contrary to the then conventional wisdom; former client and long-time executive VP of MPI, Marion Kershner, for quick and effective support of *Achieving Objectives in Meetings*; health care editor-writer Elizabeth McNulty Fromm, who assisted with reorganization; corporate librarian and information specialist Barbara Morton who assembled the index, and the Denver contingent, our sister, Bernadine Cavalier Irish, who assisted with library research, as did MPI librarian Ruth Ann Zook, who added gentle criticisms. Finally, Joyce O'Brien, who—looking beyond the controversy toward the idea—published *Achieving Objectives in Meetings* under the imprint of her own meeting planning company.

All the industry's events of the past two decades and all the known and unknown supporters have helped construct *Sales Meetings That Work*. To all who have helped: my thanks. To all who are willing to work to seek better ways to help others: my admiration.

**Richard Cavalier**