

Achieving Objectives in Meetings

Theory and Practice
for Solving Business Meeting Problems

The world's first How-to book in the meetings/convention industry.
Cavalier invented the title phrase, now a standard industry concept.

Richard Cavalier

NOTE: The PERT Diagram above is the world's first (and only?) true PERT diagram for meetings control—that's *management!* The PERT designation refers to the military's formal title: Problem Evaluation and Review Technique. It was developed to control the creation of the Polaris submarine, which was the first of its kind. Each of your meetings is the first of its kind!

PERT is timed logic. It forms a running calendar of interim steps that must be completed on time if you expect your project to happen on time. All of PERT's horizontal function lines (parallel to the center Coordination line) must be delivered on or before the project's target date (arrowhead)—in this case, on or before your move into your meeting space for the given event.

In Cavalier's original book (*Achieving Objectives in Meetings, 1973*) and in the Dow Jones-Irwin expansion of that title (*Sales Meetings That Work, 1983 and 2002 update*), abundant forms and thought guides prepare the user/reader to complete each of those horizontal functions (and lines) workably. So this PERT Diagram is actually the blueprint for an entire, proved system of meeting *management*, as is presented in both AOM and SMTW. As was stated in AOM: "You can plan for sun at a picnic without affecting the weather." *Management* demands controls and fail-safe options. . . and *SMTW* helps you to develop everything needed for valid, competent meetings, whether you're a professional or a sorrowful, "stuck-with" amateur.

However, several editors in the meetings/conventions field have printed paperwork Flow Charts (which are very complex and make wonder-struck viewing) but have erroneously labeled those Flow Charts as being PERT Diagrams. Wrong. Complexity and calendar are not equals.

That error says two very important things: 1) Some editors are much less versed in the intricacies of meeting management than they should (or pretend to) be; and 2) Some editors defer to the wishes and assurances of their manufactured "experts," whose own best interests and attitudes toward actuality and function do not necessarily jibe with your best interests. Has the given "expert" really had valid experience as a meeting manager? Demand qualifications!

Flow Charts do have value to consultants and organizational development specialists who might need to understand the given company's paperwork flow. But the Flow Chart makes no reference whatever to calendar. Worse, any Flow Chart is valid for only that company for which it was developed. Moreover, various functions within that same company require different flow charts. In short, purchase orders, requests for payment checks, periodical reports, and employee suggestions, for instance, do not follow the same paper trail. For what purpose was that given magazine's published Flow Chart designed? Except to you show how to develop such a tortured paper trail yourself (do you have a purpose for it?), what was its value to meetings managers?

None! You'll be doing yourself a favor if you read any meetings/conventions industry publications along with a healthy serving of disbelief! Their credibility is in shambles.

The columned articles below were early treatments of significant facets of the *meetings management* process. Reader response encouraged the creation of *Achieving Objectives in Meetings*, in 1973, which presented the proved system developed at United Attractions, Inc. (see related button). These dozen articles were selected from all our writings of that time, early-1970 to early-1973, because they best applied to the (horizontal line) functions. Subsequent articles can probably be found in your library on microfiche re: *Sales & Marketing Magazine*.

From *Achieving Objectives in Meetings*
©1973 Richard Cavalier

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:

- the first document debunking Marshall McLuhan's myth, "the medium is the message."
- the first demand for professionalism from meeting industry suppliers as a group.
- the first championing of adult education as the meeting focus.
- the first announcement that companies could meet abroad for less or little more than they spend at home.
- the first industry endorsement of the PERT method of convention control.

In writing those articles and this text, the author is committed only to fact and dollar value . . . to enable men to improve their knowledge, their techniques, and themselves. These insights demonstrate a degree of know-how and understanding which we feel deserve broad attention in today's hectic meetings industry. It's our way of saying that we, too, understand.

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.

Presentation: Because people still identify only with people, the most convincing manner of presentation is still a capable speaker. A featured motion picture or a sociodrama is, in this context, an effaced speaker. Most speakers choose to use visual aids to capture excess brain power — everyone knows retention is highest when both eye and ear are engaged. In small groups, a speaker can deliver a message informally, using printed handouts, charts, and/or cels generated on the overhead projector. In large groups, especially with technical material, visual aids are required to conserve time, magnify small items, and deliver identical concepts or images to everyone. PRESENTATION techniques must serve the learning process. Prominent educators and industrial trainers have made significant contributions toward practical application of teaching/learning principles.

“Entertainment has as its goals satisfaction and pleasure in the present moment; adult education’s goal is dissatisfaction and change. . . . Entertainment establishes a relationship of one-way flow of communication from transmitter to receiver; adult education relies heavily on dynamic interaction among the learners and between learners and teachers,” Malcom Knowles writes.

“Transmission of learning is made possible only if other elements such as past experience, present motivation, and effective state of the learner provide an appropriate ground to close the sign/symbol circuit by which communication is effected,” according to James W. Brown and James Thornton, Jr. (See bibliography for further readings.)

How different the emphasis when education — not entertainment — is the fix of a business meeting! And is it shocking that people give different values to comedians, family and jobs? Presentation techniques — machines or people — which exceed the teaching/learning requirements of the speaker and his message are *packaging*.

Packaging is nice. It fills in gaps and lends a pleasing continuity to program

segments. Properly used it helps a poor speaker look professional. Packaging is no substitute for message, and it is highly dispensable.

To evaluate your program’s production plan, price the educationally-required visual/live segments separately from the packaging materials. Work only with a producer who *understands* your message. Unfortunately for the meeting planner who wants to escape responsibility, meeting plan evaluation is not subjective: it’s a matter of applied educational principles.

Even at today’s prices, a few thousand dollars will buy respectable program components; and \$10,000 per hour will buy an elaborate program, professionally produced, complete. You decide whether the benefits of the packaging are real or imaginary at the prices quoted by your producer.

Through it all, keep a sense of perspective. A superspectacular media show might look good compared to one staged by a personal or divisional rival; yet compared to other promotional tools that could have been bought with the same packaging money, it can be a dog. Management’s increasing insistence on take-home information/training kits is tacit acknowledgement that a belly laugh is not necessarily gut involvement.

How much product must be sold at current profit ratios to pay for \$100,000 worth of mishap on stage? When \$100,000 is invested in an off-Broadway show, the backers have a fighting chance to win it back — multiplied! Industrial management wants the same opportunity: A business program talking business language to businessmen. That requires a message, training followup, and value-received . . . so a product can be sold more efficiently, more profitably.

Isn’t that what a business meeting is all about? ■

March 1970

BIBLIOGRAPHY

Arthur R. Cohen, *Attitude Change and Social Influence*, (New York: Basic Books, 1964).

Carolyn W. Sherif and Museser Sherif, editors, *Attitude, Ego Involvement and Change*, (New York: John Wiley & Sons, 1967) see monograph by Karl E. Weick.

Carl I. Hovland, Arthur A. Lumsdaine, and Fred D. Sheffield, *Experiment on Mass Communication*, (Princeton: Princeton University Press, 1949).

Peter Rossi and Bruce Biddle, editors, *The New Media and Education*, (Chicago: Aldine Publishing Co., 1966), see “Adult Education” by Malcolm S. Knowles.

James W. Brown and James W. Thornton Jr., editors, *New Media in Higher Education*, (Washington: National Education Association, 1963).

Raymond J. Corsini, Malcolm E. Shaw and Robert R. Blake, *Role-playing in Business and Industry*, (New York: Free Press of Glencoe, 1961).

B. T. King and I. L. Janis, as quoted by Jansen and Stulurow in “An Experimental Study of Role Playing,” “Psychological Monographs,” Volume 76, 1962).

Homer C. Rose, *The Development and Supervision of Training Programs*, (Chicago: American Technical Society, 1964).

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

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 sensate) 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

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

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

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.

Mainlanders are moving out of the American Virgin Islands, and even the Puerto Ricans have plenty to be resentful for. Caution — even the much-publicized South American revolutions are less consequential to individuals.

CONTRACTS: Be fair and explicit (see my December column). Foreigners are more people-oriented and respond best to the soft-sell. It's another way of life.

HOTEL MANAGEMENT: Choose owner-managed facilities, because the pervading attitude is that of the owner rather than the contract manager — absentee landlords are the same anywhere.

Where an American chain has equity in a property, service is consistent with U. S. standards.

Where an American chain has no equity, foreign staffs sometimes act like orphans.

In general, U. S. management has raised operating efficiency, prices and profits; it has often sacrificed personal service and genuine interest in your needs and problems.

Hilton International doesn't deny an "in writing only" policy when difficulties arise. By contrast, a quaint concept called honor exists abroad, where innkeeping was an art before the U. S. was a nation. American management abroad originated and continues because of the airlines' need to guarantee rooms to their passengers.

INSPECT FACILITIES: Just as at home, diagrams and reality often differ. In addition, careless maintenance and service exist even in American chain facilities. In Trinidad, for example, we survived goofed up reservations to find an unmade room; non-functioning icewater lines temporarily replaced with icewater pitcher but lacking drinking glasses; broken

radio controls; hotel pool intact, but cabbies charging rental car rates for a trip down the mountain to the public beach.

SEMINARS: Although the largest auditorium facilities are foreign-owned, they are actually better-equipped than you need — sometimes at a flat per-person charge no matter what equipment you request. But while education-oriented formats sometimes get voted down at home, the maturing aspects of a trip abroad contribute to the workshop type of format. The mind can take a lot of stretching in favorable circumstances.

EQUIPMENT: If extensive audio-visual techniques are essential to your message, be prepared to supervise the projection yourself. Machines are no problem, but it's almost as difficult to communicate with your projectionist in a foreign country as it is in New York.

Check the voltage and maximum supply of current, and don't forget the transformers if you're using your own Rube Goldberg devices.

TIMING: Don't schedule anything on arrival day — that is for catching up with time zones. Since a foreign trip is a rare event for most families, make allowances for either wives or vacation time or both. They'll expect to pay their share. But no vacations after the meeting — back in harness fast.

NEXT YEAR: Trips abroad can get to be a great habit — especially if your circumstances of numbers and locale result in lower costs.

All these arguments in favor of foreign trips seem biased only because they are. Seeing hundreds of cities in more than forty countries has merely intensified our travel urge. Our friends and business associates often begin travel discussions with, "I really wish . . ." Yours do too. So why not? ■

February 1971

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

- Sociodrama performed from the floor to present touchy industry problems as an argument among members.
- Professionally tape-recorded script for amateurs to mime. Audience participation games in exhibit for painless learning.
- CCTV to make a speaker palpable in a huge arena, to bring outdoor displays into the meeting room or as a silent, multi-outlet message center.
- Moderator's bait-the-panel cheat-sheet to guarantee fireworks.
- Message center as industry service "exhibit" at major show.
- Actress "consumer" to ask loaded questions of speaker. Scripted message recaps performed by actor to aid recall.
- Exhibit to repeat main message of the meeting.
- Bright room lights (rear projection screen) to kill the wanderlust of executives.
- Senators and congressmen invited to key session and lunch for soft-sell conversations.
- Exhibits opened by a celebrity (or continental breakfast) to increase attendance and flatter exhibitors.
- Airline courtesy desk outside meeting roof so the audience can "visit" the session while waiting for confirmation (necessary in Miami and other points).
- Durer's "Praying Hands" slide on screen for non-denominational silent prayer.
- Military honor guard for presentation of colors.
- Tennis court seating for panel; opposing sides placed as players; audience up close on both sides.
- Women's program for tax-deductibility. Topics as simple as "Watch his diet" or "Understand the industry."
- Major effort? The women are convincing talkers.
- Ticket box for drawing placed on stage to fill front rows.
- Wine or cheese-tasting cocktail parties arranged at cost through the respective industries.
- Parties-on-a-theme; usually under \$2,000 for all decor and atmosphere, including musical trio.
- Early-morning women's spectacular to guarantee that the men get up.
- Eye-opener music, either in halls as an alarm clock or in the meeting room as a tonic. (Use once as a notice that meetings are different. If you must repeat maybe someone is trying to tell you something.)
- Split the union minimum orchestra count into two separate groups (15-man minimum yields a 12-man band and a trio) for continuous music. A pretty singer is a "man" over at the union.
- Luncheon *al fresco* catered under the big top to permit leisurely tour of new facility far from hotel.
- Duplicate company "conventions" separated by time and place to obtain more personalized approach to smaller groups; materials reused.
- A new idea in money management? Clinton E. Frank Inc., Chicago, ad agency, arranged to shoot footage for tv commercials at an outdoor product parade created as a sales meeting opener for its client, Bolens division of FMC Corp., Fort Washington, Wis. Great community relations for free!

A New SM Department

Meetings Management

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. ■

May 29, 1972

HOW

MEETINGS

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! ■

June 26, 1972

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 Salutory 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 salutory. 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

HOW

MEETINGS

HELP SALES

No Need to Travel Far To Drive Your Point Home

By RICHARD CAVALIER/Contributing Editor

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

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. ■

December 11, 1972

HOW

MEETINGS

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. Gimbels* (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

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.

The event unfolds as pre-determined.

The meeting achieves its objectives.

When that happens the meeting manager achieves *his* objectives.

And this text achieves ours.

Good meetings!