

MPI

NOTE: Cavalier joined MPI twice. . .spoke at their conventions twice (winning a best-speaker Tony Award at their 10th Anniversary program, 1982). . .but quit twice. He quit both times because although many individuals had been seeking a Code of Ethics for the organization while user/members were still in the majority, the supplier/members became the majority, dominating the membership by a ratio of approximately 2:1. No Code of Ethics!

Even the name has been changed: from “Meeting Planners International” (the nation’s second but sole-surviving general-user organization) to “Meeting Professionals International,” which suggests that selling-something confers expertise in a complicated field. Suppliers do provide the funds and exhibits that attract members to the conventions. . .cash vs content.

After 40 years, there’s still no Code of Ethics at MPI. Without a Code of Ethics, how can any group be seen as *professional*? Even today, ethics has a very low priority in an industry in which promises, misrepresentation, and up-charges are standard with many host facilities and supplier/service firms. In this *Meeting Manager’s* opinion, a group founded originally for users has become a marketing tool for suppliers. Or, as stated in the award-winning address, fish in a barrel!

More tellingly, a convention-suppliers’ association has adopted a Code of Accepted Practices, which itself seems to suggest an abundance of unacceptable practices. The best defense mechanism is your education--your comprehensive understanding of your meeting needs. Averages mean nothing.

From *Meetings* magazine’s annual reports: Meetings are still the primary venue (over 50%) for delivering training programs across the nation. . .Cavalier guesses about 100% meetings-delivery in small and many mid-size companies.

Key problem: Hazard, every time. Without an enforceable Code of Ethics, suppliers are free to engage in objectionable practices. Fee-for-service was once a distinguishing mark of consultants that guaranteed freedom from conflict of interest—today it suggests a fee above profit and possible conflicts of interest. *Caveat emptor!* Get recommendations from your peers. The web is a terrific tool for scouting hazards! Ask around.

Key disadvantage: With suppliers in the voting majority of a supposedly ‘user’ organization, the supplier viewpoint overwhelms: sell something! Some purchases really can help, either by knowledgeable choice or wild good luck. Don’t depend on luck for continuing success in meetings/conventions. Learn more than how-to-order techniques!

Prime challenged opinion: Audio/visual programs in excess of educational needs will split the attention span (his term, *maxi-media*, 1970s). The current term is *distraction*. Google it. Apparently even music can distract in some circumstances. Many others of his challenged opinions have now been validated by research and/or practical experience. Check this website; ‘Titles’ button; then “Final Thoughts” file at the asterisk below the “ISD” book. The first segment(“...Today’s...”) should be sufficient to convince.

Key recommendation: *Content* not purpose, should dominate all decision-making. You do not need a sales meeting, *per se*. You do need an intelligently-planned meeting at which improved and useful sales methods and tools are learned and practiced. Did you provide the

tools? Did sales people practice with the tools? Toward what measurable objective? Did you measure their progress both at the meeting and on-the-job? Did you provide remedial help, if needed? If not, the failure cannot be assigned to *them bums* alone! This aspect of meetings content is not taught by the meetings industry while concentrating on with treatises re: hors d'oeuvres and table settings.

Fulfilling that content recommendation is the Meetings Manager's job. The job is not merely to *plan*. As stated in the nation's first how-to meetings-control book, *Achieving Objectives in Meetings* (Cavalier, Corporate Movement, 1973; O-O-P), "You can plan for sun at a picnic without affecting the weather."

Weather control is management's job: a *Plan B* for every key concept addressed, because accidents happen to even meticulously-planned meetings. Cavalier's *AOM* was expanded into Dow Jones-Irwin's hardcover *Sales Meetings That Work* (1983)—all of the same proved forms and guides as in *AOM*--the preferred reference for meetings theory and practice after a decade. His terminologies still dominate the industry.

Meeting *Planner* is not the operative term in controlling meetings and training. Cavalier believes that Meeting *Manager* is proper, a term probably first published in an article by Joseph L. Coach, Convention Manager of then-Linen Supply Association of American (LSAA, now 'fabric rental'), then a client of United Attractions, creator of the meeting/conventions consulting function (1960). Cavalier participated in birthing that new service. See the Coach article and cover letter to the magazine's editor (1960) on this website, under 'Recognition' button; then 'Client' base button.

Unfortunately, even the Certificated Meeting *Planners* of MPI are 'graduating' with an ability to buy from hotels and suppliers in a manner that the hotels and suppliers determine. The Meetings *Managers* need to determine and obtain the needed elements of the individual meetings, which are usually different from each more than alike, despite surface similarities. The shortcomings are expressed in inadequate agendas, facilities, and services. . .and "Them bums never learn nothing!"

Unless the meeting/convention concept includes adequate preparation and fulfillment, it's irrelevant how pleased the suppliers might be with planners' order forms. The supplier's job is to sell. The Meetings *Manager's* (and top management's) job is to create understanding and skills so that employees can perform as intended. Performance, not shallow applause for shows!

Is this information welcomed by the industry (distinct from related professions)? Not since the delivery of the 10th Anniversary Convention (1972). When Cavalier propounded his criticisms and stated well-founded but unwelcome views, many suppliers stalked out. User-members moved forward into the vacated seats. Pyrrhic Victory: an award but continued abuses.

If anyone out there would like to recreate a meetings/training organization that serves users first and foremost, you'll get help if you'd like it from Cavalier. If so, contact: Richard Cavalier; Meetings/Cavalier; 3699 Wilshire Blvd #850; Los Angeles, CA 90010.



Meeting Planners International

Ruth Ann Zook
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February 15, 1985

Richard Cavalier
4900 Marine Drive
Chicago, IL 60640

Meeting Planners International, a not for profit, educational and professional association, is preparing a handbook of writings on meeting management topics. We would like to photocopy the selections cited on the enclosed form and include them, giving you full credit.

The 200 page (approx.) handbook, titled MPI Meeting Professional's Handbook will be in looseleaf form, in English, and, with a few other items, will be part of a learning kit. We plan to prepare 1000 copies to be offered primarily to members in the U. S. and Canada in late spring/early summer 1985. The price, based on production costs, has yet to be determined.

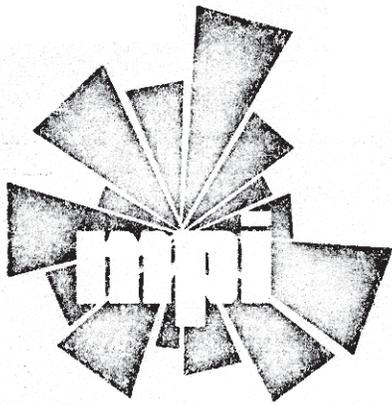
Kindly indicate your permission by signing the attached form. Please indicate how credit should be given.

If you have any questions, don't hesitate to call me.

Sincerely,

A handwritten signature in cursive script that reads 'Ruth Ann Zook'.

Ruth Ann Zook
Meeting Resources Coordinator



meeting planners international

THE PROFESSIONAL
SOCIETY FOR THOSE
WHO MANAGE MEETINGS

December 27, 1982

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Mr. Richard Cavalier
Consultant/Group Communications
Cavalier Company
4200 Marine Dr.
Chicago, IL 60640

Dear Richard:

Thank you for your significant contribution to the success of MPI's 1982 Fall Conference in New York, NY. In recognition of your achievement in development and presentation of your speech we are awarding you the coveted MPI Tony Award.

We appreciate the time, effort and talent put forth in the best interests of Meeting Planners International. Thank you for playing such an important integral part in shaping our educational goals.

Best wishes for a New Year full of other fine performances.

Sincerely,

Douglas Heath, CAE
Executive Vice President
and
1982 Fall Conference Chairman

DH/lg
Enclosure



NEWS
NEWS
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VOL. 8, NO. 8
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NEWSDATA

NEWSDATA

SEPT. '79 - PAGE 5

COMPETITION BRAKES GUARANTEE TREND

by Richard Cavalier

Despite increasing pressure by hotels toward longer advance periods for meal guarantees, the 24-hour advance guarantee is not yet dead. Even the emerging new "standard" 48-hour advance period is not firm; and not a single facility contacted was willing to acknowledge or endorse a 72-hour advance period as policy. Standard rule for meeting managers: negotiate guarantee terms or take the risks.

A spot check of perhaps 20 major convention facilities across the country indicates a uniformly restrictive change in hotel policies toward variation in setups on those meals guaranteed. Whereas all hotels were once prepared to serve 10% up or down from the guaranteed count, today most allow 5% up-only; some, 3% up-only. Guarantees for hors d'oeuvres are generally non-variable.

For meeting managers, the net result of the extended guarantee periods and eliminated downs in count is increased problems and additional cost: meals paid but not served, known in the trade as breakage.

But more restrictive conditions by hotels are not entirely unjustified, nor are hotel sales managers unaware of the effect on their customers. Yet the combinations of negotiable conditions are staggering.

The 24-hour period is standard at the Drake in Chicago; the Americana (now Sheraton Centre) in New York, and the Sands in Las Vegas. Ups-only at 5%, 13% and 10%, respectively.

"We hire waiters direct," explains John Raphael, maitre d'hotel at the Drake, "and so we require 48 hours only of a highly variable group. There is absolutely no need for 72 hours notice."

Policy is 48 hours at the following facilities, but 24 hours is common by special arrangement if the group is registered inhouse:

"We're extremely flexible," says Bill Goldring, Director of Catering at the Fontainebleau in Miami Beach (5% ups "To a reasonable number.")

"We take minimum estimates on Friday with a guarantee on Sunday" even though weekends are a problem, according to Lou Wizemann, Director of Catering at the Sheraton Boston. (Policy 5% up-only to a maximum of 5 tables or 50 setups.)

"If the group is registered inhouse, we can go on an educated guess if the earlier estimate is realistic," Otto Riese has found. He is Director of

Catering at the Mayflower in Washington, D.C., (Policy 5% ups; 3% over 1,000.)

"While 72 hours is marvelous for the hotel, it's difficult for the client," Linda Young feels. She's Co-Sales Manager/Catering for Chicago's McCormick Inn. "There's no fl...t okay for 24 hours, but we'll work with a registered customer who has good credit. The others pay in advance." (5% ups only).

"We understand," assures John Bellour, Catering Manager at the Mark Hopkins in San Francisco. "We prefer 48 hours (5% ups), but will accept 24 with good reason, such as tickets being sold, etc."

Other facilities are relatively inflexible about 48 hours, even if exceptions are conceivable.

Just across Nob Hill, at the St. Francis, Director of Catering Dan McCall insists on 48 hours for minimum guarantee. But he softens the effect considerably by permitting "unlimited ups; we'll set and serve any greater number, although the entree might vary for the adds." To get the best waiters, he orders on Friday noon for a Sunday evening or Monday noon function. "That could work out to more than 48 hours, but by necessity, not policy."

The Hilton Hotel chain is considered to be a 48-hour/3% ups-only adherent in its metropolitan properties. But chain policy forbids local executives from discussing the policy with publications except in writing. However, David Spitzer, Director of Catering at the Palmer House in Chicago, willingly tackled issues. "Weekends are problems because many meat purveyors now deliver only on Mondays and Thursdays. To lose a piece of business because of 48 vs. 24 hours is a dumb way to lose it; we wouldn't let it go." And on setup allowances: "Ten percent is dead; 10% of 1,000 people is too many meals and waiters to get stuck with."

It's 48 hours at the Hyatt Regency Chicago, according to Banquet Manager Frank Moos "unless okayed by top management under exceptional circumstances."

"We can name reasons, including unions, for 48 hour policy," says Edgar Suger, Director of Catering at the Hyatt Regency O'Hare. "But we are in a service business--how can we tell you, 'Our policy or nothing?'" Depending on menu, "We'll bend. Steaks are easy; lobster is difficult."

Despite a 24 hour policy at the Sands, the MGM Grand in Las Vegas is sticking with 48 hours, with 10% ups-only to 500 persons, and 5% over 500. Executive Catering Manager Nick Bunghero

(Continued on Page 6)

Competition Brakes . . .

(Continued from Page 5)

mentions unions as one cause. "Role call at the union is Saturday, 12 noon, with orders due by 11 a.m. for Sunday and Monday. A large facility can't take a chance because service to the customer would suffer" if last minute orders fail to turn up the required number of waiters.

"A 72 hour demand will jeopardize the business," as Raphael De La Vega sees it. He's Director of Catering at Holiday Inn Mart Plaza in Chicago. His policy is 48, but "We have made changes only hours in advance for major repeat customers. If the Catering Manager and Purchasing Manager have a good working relationship, this can be worked out."

Although 48 hours (or 2 business days) is policy at the Marriott O'Hare outside Chicago, "We have done a morning-of guarantee if the group is staying in the hotel," says Joseph Tschaler, Director of Catering. (Policy, 5% ups-only.) "Seventy-two hours is of no value, since the picture often changes drastically within that period."

In short, nobody will refuse to consider shorter-than-policy conditions when the customer's circumstances genuinely require it.

Then where does the concerted effort for longer guarantee periods really originate?

"Breakage is the name of the game," in Ray Hall's experience as Executive Vice President of the Electronic Representatives Association, Chicago. The group has met in countless facilities at home and abroad.

"Food and beverage managers sitting with accountants have decided that a certain amount of profit will be made on breakage. They don't want to lose it," Ray Hall believes, "and they don't know how to deal with a client who understands that." Ray refuses to accept standing policy and has often won same-day guarantees from major facilities. In his opinion, the menu is the determining factor.

"Sit down with the chef and find out his problem. Ask him, 'What do you need by meal and menu?' Don't expect him to give you beef wellington on short notice." Such a conference worked to everyone's satisfaction at the staid Grosvenor House in London," Ray recalls.

But most meeting managers are not anxious to fight the proliferating conditions—they have too many legitimate problems already. Their attitude is best summed up by Mary Lou Wolf, a multiple manager of associations in Chicago, including the

Chicago Society of Association Executives.

"I'll go along with the hotel whenever possible," she says. When 48 hours is necessary, "it is understandable and acceptable." But given walk-ins and no-shows, "72 hours is harsh and unrealistic." However she cautions that her situation is typical because "over the years, I have come to know the members' habits; there are few surprises."

Each side is ultimately responsible for its own problems, of course. But if a trade-off must be made between time and personnel factors, shouldn't it be the customer's choice?

Conference Proposals Mailed

Proposals to MPI member hotels to be headquarter properties for future MPI national conferences have been mailed.

The MPI Board of Directors states that these proposals are for the years 1983 and 1984.

The cities involved are New York City and St. Louis, Mo for 1983 and the Rocky Mountain area and Houston, Tex. for 1984.

Proposals for 1981 and 1982 have been received and are being evaluated. These cities are Toronto and Atlanta (1981) and Wash. D.C. and San Francisco (1982).

It May Speed Up Delivery . . .

Does MPI Headquarters have your mailing address? Not a P.O. Box number but a numbered street address?

Seems that MPI is often required to forward rather heavy and large-sized items to its member and UPS (for example) is the economical method used.

However, UPS doesn't deliver to a P.O. Box so the item is returned. UPS must have an address.

Such items as Interface Profiles, books, plaques and other weighty material are being returned to us. If you have a P.O. Box we would appreciate an update.

Professional groups geared to the USER'S viewpoint (YOURS!) gave immediate acceptance to this authoritative how-to text:

"Recommended reading"

mpi

meeting planners international

Achieving Objectives in Meetings—Theory and Practice for Solving Business Meetings Problems/337

Richard Cavalier, Corporate Movement, Inc. Because it is a collage of columns, articles and freshly written prose, this work is less than even. But the author manages to get his ideas on corporate meetings off his chest. His main ideas are exactly contrary to McLuhan's; namely Cavalier believes that the content far overshadows the form. Beyond that, he believes meetings should not be an end in themselves—that form and content should combine to achieve some rational goal for the company. Cavalier lances some of the boils that afflict the meetings game—the hypes, ripoffs, hucksterism, and free-booting. Sometimes the training theory is a little weak, but there is a lot of useful stuff here. \$14.95.

ACHIEVING OBJECTIVES IN MEETINGS

by Richard Cavalier

Corporate Movement, Inc., 219-page hardback

\$14.95

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

This book is an innovation in "how-to" texts in several ways. It doesn't pretend to be all things to all meeting managers, and so it bypasses the beginner's primer on ashtrays, ice cubes, and seating diagrams. 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. The author recognizes that textbook problems are not the only ones. He builds an understanding of the fundamental stresses and weaknesses of programs 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.

The book is a problem-solving kit for nonpersonal 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. As a co-originator of convention coordination as a consulting function, he has implemented his methods in the meetings and conventions of many blue chip corporations and major national associations.

Training in Business & Industry, Oct. '73

Training and Development Journal, January 1974

Achieving Objectives in Meetings.

Richard Cavalier, Program Counsel, 4900 Marine Drive, Ste. 811, Chicago, Ill. 60640. 218 pages. \$14.95. 1973.

Meeting planners do not have to be told that meetings are demanding or that they require thoughtful management of the myriad tasks and decisions involved in successful ones. We would all benefit, however, from an improved understanding of the relationships of those functions and processes and how we might better control them.

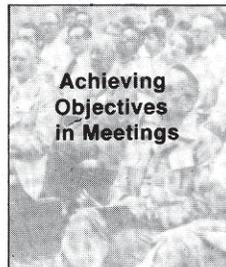
Achieving Objectives in Meetings provides something more than a guidebook of "how to's." Mr. Cavalier identifies the crucial decision areas involved in meeting management, breaking them down into understandable, manageable form.

By viewing the meeting from an almost mathematical perspective, the manager may be assured that each decision will relate appropriately to the whole meeting. He becomes equipped to make each decision an intelligent, authoritative and valid one.

This unusual and enlightening book accepts without question the importance of clearly outlining methods of control to achieve measurable objectives and meaningful goals. Control is the key word and Mr. Cavalier approaches the meeting manager's responsibilities from that perspective using absolutes (always, never, only, etc.) in all instructions. One may choose compromise, we are told, but that is a selection of risk as well.

An excellent communicator who mixes wisdom and wit, he's an exceptional teacher who expresses ideas in measurable terms. He provides, in addition to impeccable logic, ap-

propriate supportive materials which enable the manager to use this text as



an extremely valuable problem-solving kit.

All materials presented are based on two tenable fundamentals which will not necessarily be embraced as truths by all who call themselves meeting managers: (1) meetings are a commitment to convey information and as such attention must be focused on meeting *content* rather than on the package, and (2) the meeting manager is one who controls each of three key elements of the meeting (message and authorities, participants/audience, and support materials/media) to ensure that *communication* occurs. We are taught that the

meeting manager never confuses education with entertainment and to judge each meeting on its educational merits.

The philosophy expressed is the backbone of this book's importance. This rare presentation of the importance of the message is couched in sales terminology. The message is universally applicable to meetings management; the reader must invest energy to translate the information into more general terms and that expenditure of energy will be well repaid.

Supportive materials are excellent. Included are reprints of ASAE's Hotel/Association Facility Contract, a PERT Guide and other valuable worksheets and guides which will carry the planner from early stages of program concept

through final evaluation and conference reports.

The professional who applies the theories presented may measure success in what the author terms the Alpha-Omega of every meeting planner's responsibility, the achievement of (meaningful) objectives.

—C. Penny Hiernu
Chairman,
RMAMPI Resources Committee

Your comments and suggestions are appreciated. If you have materials which you would like to see reviewed in this column, please write: C. Penny Hiernu, Chairman, RMAMPI Resources Committee, 280 Orchard Street, Golden, CO 80401 or call (303) 279-5259.

MPI Tony Award-Winning address
Fall, 1982; Tape # MPI-918
(Producer: Meetings Internationale, Louisville, KY 40232)

(Transcript)

[ID]: Recorded on location at the 1982 Meeting Planners International Fall Conference. "MPI Plays Broadway"; held at the Grand Hyatt Hotel, in New York City, New York; December 5-8, 1982.

[Title]: "Achieving Objectives in Meetings"; Richard Cavalier. To "Achieving Objectives in Meetings, or Promises, Promises." [Brief introductory comments.]

Cavalier:

Thanks, Pat. Good afternoon.

"Achieving Objectives in Meetings". . .as a seminar title? And only three weeks from 1983? Nearly a full decade has passed since my first book by that name converted a logical concept into a generic phrase. And it amazes me that this concept need be discussed here today.

If you're planning to call a meeting, why should you call it if you have no purpose? And if you do have a purpose, why should you not express it as an explicit purpose or goal? And, if you state an objective, why should you not apply qualified or quantified measures to verify the group's achievement? Common sense calls for that much rational effort.

Then why doesn't the industry do it routinely? Because, as a whole, I feel that the industry is essentially incompetent in group communications. It avoids any deep application of established theories and methods of adult education and communications, topics first linked in the 1970s article. That avoidance tends to prove the charge.

Moreover, the incompetence is masked by the unfortunate (but highly visible) program production. . .including media and the surround, contributed by the site itself. And the willy-nilly acceptance of applause, a measure of entertainment value, as a proof of success. These are all false measures of learning and therefore false measures of success.

Meetings are a communications tool. I first presented that concept in a 1964 publication, now out of print. I used that precise line as an opener for my 1973 book, and I use it verbatim for my new 1983 book because it's still necessary. Where are the fresh ideas. . .the original thinking. . .the applied research that should be generated by this organization?

Communication is complex. It is signaled by an appropriate response. If you do not elicit or evaluate that response, you cannot claim success. If you knowingly participate in the industry's game of pretense and artifice, then you are incompetent as a communicator, however skilled as a superintendent of production and site selection.

Your organization is paying for communication. If it valued the meeting hall and media, it could rent those without sending people. And, in too many instances, that would be an improvement in cost effectiveness.

Any failed meeting costs more than dollars. It costs lost opportunity, as well. And that lost opportunity can seriously alter the market position or professional standing of the organization.

Now, what about the people? Surely you remember the people—they're the reason the meeting was called. If your communications attempt is defective, or non-existent, you damage their job performance. That could adversely affect their careers and therefore their own and their families' lives. That's an awesome responsibility. And if you knowingly approach that responsibility with superficiality or incompetence, then you are unethical and unprofessional.

And if your suppliers knowingly mislead you in damaging the best interests of you, your participants, or your organization, then your suppliers are also unethical and unprofessional. And so, under the same circumstances, would be the industry publications.

The issues are clear: they have been for years. And it is to both the detriment and the demerit of the industry that it has avoided setting workable and enforceable standards in protection of its people and its ethics.

Professionalism is based on standards. Where standards don't exist, professionalism cannot be claimed or proved. How can any of you, except in terms of similar labor, establish or defend your claim to professionalism? You can't! Not objectively. . .not today.

So you have a stake in developing *valid* meetings—those which have a right to succeed because they provide for all the needed elements of message, tools, and audience.

How do we account for so great a gap between known-needs and the common practice? Why have we, in effect, been cooperating with inadequacy, dishonesty, and even malpractice?

Part of the problem might be that the group communications and mass persuasion techniques are not easy to master. You have to work at it, to test, to measure, adapt, adjust. That begins to sound like a professional approach to our craft.

Part of the problem might lie in the industry's reliance on the methods and preferences of its suppliers, who, if not challenged or committed to non-conflicting standards, can legally pursue their own best interests. Why permit that? Why jeopardize your own best interests?

Is it possible that a big part of the problem is simply insecurity. . .your own? To what degree are you eager to embrace the industry's shallow and irrelevant measures in order to appear competent at the most facile and visible facets of the overall program? To what degree are you so unsure of your ability to fulfill objectives that you would rather not set them. . .or risk measuring your own achievement? Do you fear the objective goal? Or do you really not comprehend the goal that the organization has in sponsoring any meeting?

Some persons excuse themselves by saying that they are 'only coordinators,' not Meeting Managers, and therefore have no message responsibility. And at the lowest step-and-fetch-it level that might be true. I doubt that it's a valid excuse for any of us in this room.

But even those who are strictly coordinators of production and execution have a responsibility to *protect* the stipulated message, because the communication function crosses all boundaries of job title or committee assignment. You simply can't duck the need or the obligation to set goals and measure results.

How much more secure everyone would feel if the industry and especially this association would adopt a Common Body of Knowledge, establish workable standards for bids and performance, set and enforce a rigid Code of Ethics, commensurate with the gravity of our task, human growth, and potentialities.

How much more effective we would be as professional planners if we deal from strength. . . from understanding. Only your understanding of every element of your program can guarantee your control of the event all the planning and activities finally become.

You don't gain understanding by flipping a coin or by checking off squares on somebody else's generic check list. You cannot buy in piecemeal fashion on an emotional or subjective basis and still expect to create program synergy or objectified success.

So let's try to correlate in theory some of the many theories which must be correlated in practice if you would create a valid meeting which has a right to succeed.

Briefly: we'll look at success, cost effective spending, the medium-vs-message dichotomy, meeting justification, professional costing, and meeting formats. Remember, we'll be dealing with correlation, not a detailed study.

So let's start with "What constitutes success"? Suppliers say, "Glamor and applause." It's what they're selling. But existing research says that that's the wrong measure of communications or learning. Coordinators say, "It's error free production." But it's what they're selling. All common techniques were developed about twenty years ago. Where's the growth? The trade press says, "Something photogenic bought from advertisers is success." And they're true to the advertiser. But is that no-problem for you and for the ideas that are put forward in the trade as being something to strive for?

All are irrelevant to the true measures: objectives achieved. You must quantify. . .you must qualify, in general. And you must demonstrate with each individual that instructional objectives are keyed to his performance.

So, as outside viewpoints, all of the above often do—and sometimes usually do—conflict with your own interests and needs. Such dictated irrelevancies result in superficial programs.

Now, the innocent participant still deserves the best. So that we have to come back to "Success is

only the achievement of pre-determined goals.” And the value of the goals determines the budget value.

So, we on cost effective spending: What does ‘the best’ cost? Well, it’s different for every aspect of every program, because ‘the best’ depends on the benefits to be derived. . .all of which have value of some kind, either in dollar or in human resources accounting or both. So cost effective analysis is indispensable to early planning. As a capital expenditure, your program expense must show a return on investment. As a tool, it must be productive. And you must eliminate prettiness and entertainment values as considerations in your planning for the message.

Re-evaluate the alternatives: Entertainment, enjoyment, good-will, and morale. Of value, yes; but how do you calculate the worth? How can you measure? Is it only on guesswork? That’s been the problem that has had people saying that “The budget is too high” or “I don’t have enough budget.”

If it’s not calculable in business terms, how can the meeting components be analyzed in a cost/benefit study? And, of course, the secret is that they cannot. So the industry is playing ostrich. And who benefits? Certainly, not the meeting planners, who have become a marketing target, rather than a market force.

Then there are the folks who invoke tradition. “We always have a Fall meeting,” they say; or “The boys expect it,” or “We’ve got to show the buyers a good time.” Well, if that’s the way you’re going to make your decisions, don’t forget “A stitch in time save nine” and “Nice girls don’t do that.” Because it’s management by cliché or management by abdication.

Now, some people like to impress the gawkers. Spectaculars and maxi-media all depend on overwhelming the senses to achieve their effect. However, that’s directly contradictory to educational theory and methodology.

For instance, Broadbent’s ‘filter concept of learning,’ which he put out in 1958, requires that information input can be reflected upon or rehearsed, preferably free from competing inputs and stimuli. . .and it also requires practice to convert the lectern theory into personal methodology. . .and rehearsal of the ideas to preserve and prolong the retention.

So we’re down now to a very, very basic kind of dichotomy: medium and message. Unless you’re very, very lucky, you’ve never heard Marshall McLuhan’s quote, “The medium is the message.” In his book “Understanding Media,” in 1964, he wrote, “The content of writing is speech, just as the written word is the content of print, and print is the content of the telegraph.

That’s not so. The content of speech and the written word is ideas. Their *format* is words. So, this misunderstanding has persisted nearly twenty years, because it coincided with the New York World’s Fair Kodak exhibit, which was truly spectacular. . .for the public. . .and therefore coinciding with supplier interests. . .It has gone ‘round and ‘round and ‘round. But Kodak’s message was, “Ain’t film grand?” And it was. But that’s not *your* message.

Now, media research say contrary things. And that’s even apart that from the training and education that’s out and fairly accessible. You have, for instance, the Army reports from

HUMRRO (the Human Resources and Research Organization) and from Dr Joseph L. Canner, of the US Army Training Command. They have demonstrated, in a number of studies, that color and motion make no significant contribution to learning. To appearance, to packaging, yes. But to learning, *no!* And work with diagrams can be equally or more effective than expensive media versions, depending on the skill of preparation and usage. . . .And that's where you come in--your contribution.

Now, you have to get your audience involved. The audience has to work a little, too. It has to concentrate. But keep in mind, when you're planning the blitzes and the maxi-media spectacles: The brain cannot process simultaneous conflicting inputs; and it either prioritizes and blocks out--or forgets.

That facts say that, if you're not now planning with these key findings in mind, you're perhaps incompetent in the most significant part of your job: communications! If you know what your message is, and what your performance goals are, then you'll know when you've reached them. Then, stop!

So the key factors in meeting planning then are these: your message, audience, and tools--considered all three together. No meeting is valid until all three are explored and fully provided-for.

Media and hotels are support mechanisms. They're part of the surround. You bend them to suit. You leave your choices to last, whenever possible. Your choices should be dictated by the meeting content and the related needs. You should not buy so early that you have to shoe-horn your program into whatever-it-is you bought long, long ago.

Meeting justification is the responsible and business-like approach to putting the whole program together. You should have a message profile: What are you trying to say? And an audience profile: To whom are you saying it? And an objectives profile: What should the audience do differently or more of? A training profile: What formal study or practice is needed? What tools are needed? And how can we assure that they'll be able to use them after they leave the meeting room? That's what the practice-and-rehearsal is all about.

Preliminary agendas: Can the above *be accomplished* in a meeting? Might you be talking about several meetings? Might you be talking about a formal training program?

The worksheet: Can the meeting pay its way? A convention week is two percent of the participants' year. That's been a question--Can it pay its way?--since 1960, when it first appeared in print.

Now, in all of your program planning, the most important thing, I think, is to distinguish between whether you're going to have a meeting or a convention--and plan accordingly. Now, a meeting is any *agenda* format used to communicate. Your meals, sports, entertainment, etc., are incidental to transmitting the message. They're part of the surround. But a convention uses an agenda format plus other formats (such as exhibits, banquets, awards, etc.). . . .as tools in the communication process. Cost and duration of the programs are irrelevant. A meeting can last a week, and

convention can last a day or less. It's all in the definition.

Now, once you've made those distinctions, you'll have perspective on the essentials and the discretionary spending as you set up your budget. We want to cost by professional methods. A worksheet approach (which shows both the liabilities and the assets of what your proposing to do) is a very, very good way to do it.

I've got you here—for later—a handout, which is the worksheet out of “Sales Meetings That Work.” I'm going to give it to you, and it's straight out of the book and [the format's print] is too small to be shown on slides—it just can't be read—so take a copy.

In addition to the things you know you're already looking at when you're considering expense, such as the meeting room, program development, facilities, transportation, optional programs, and staff time), add these other things on the benefit side—the assets. Your direct dollar benefits, such as skills-learned or -improved here: They'll add what percent of overall sales within how many months? Or market share for our product will rise what percent over previous month, order, or year? Or the long-term revenue for this new product is projected at what percent? Or an attitude change or an attitude reinforcement will eliminate the negative impact--of what?

There are other considerations that will be specific to you and to your company. List those. Then consider that there are some costs re-assignable to related functions. Some will be allocable to a training budget; some, allocable to industrial or human relations; some to public relations or advertising programs. The balance will be charged to your budget. How much is that? And now does it make a difference in how you perceive the program?

Don't overlook the opportunities for future re-use. Your people will probably be having other uses in the future, such as for dealer training. Or even if it's for internal staff only, there's new-hire training. And then there's always the customer public relations information and service.

So, finally, is what you come down to is benefits. What is your benefits-grand-total? That's the value of what the company can expect to get back; and that's approximately what the company can afford to spend on this program. . .and get its money back. And that's the budget you can justify and ask for.

Now, there are other elements, too. In the locations comparison (that is, central vs regional vs district meetings; one or several or many) done by “Sales & Management Marketing” [magazine] a number of years ago, we found that *always* the regional meetings was less expensive than the central meeting. The regional meeting was less expensive than the district meetings if it was necessary to purchase or to rent equipment for the particular program. But if the equipment already existed out in the districts, then obviously because of transportation and the large-city costs of the central meeting, the districts would be much cheaper. So keep it in mind: you can save when it's necessary by going small. Yes, you have to travel. Yes, the program has to pony, but there are other ways of getting at it.

Then, when you start correlating your activities, make sure that all of the people know exactly where they fit in the entire scheme of things. . .so that they know what they're producing. .

.whether it's part of make-read or of the event that's here. So, that whole costs/benefits mentality adds the direction to bring to the selection of the meeting types, media, and facilities.

Now, we're down to meeting formats. Your format must accommodate your meeting purpose, not mold it. Each of the program formats has special benefits and drawbacks, and you have to really understand them to know where you're going.

First, there are only two main types of program formats, and they can be combined in the same program but not in the same moment. There's the solution-delivering format. . .and that suggests the need for rehearsal and training. Otherwise, a memo would do the job.

There's also the solution-seeking format which is generally the executive meeting. It's highly structured, and it includes the conference, the discussion, buzz groups, committees, role playing, case histories. . .and also the loosely-structured, such as small groups, brain storming, problem-identifying and problem-solving sessions.

Now, within 'discussion,' there's the debate, forum, panel, symposium, and interrogation. You can find the differences between those in any speech book.

The logical progress of most program sequences are, obviously, from the problem-identifying to the problem-solving conference to the solution-delivering meeting: probably a training session with workshops. And, in all of this, the secret is still KISS. . .this time, "Keep It Straight, Stupid." All media, including video conferencing, must serve the meeting needs, as determined by message, audience, and tools—the three, developed together.

Now, let's see if we can reach some conclusions from all of this.

First, irrelevancies are costly and destructive, and they must go. Good learning and teaching theory must guide all your planning. Literature on AV-learning must be studied. And respected. Your goals must be valuable. . .reachable. . .measurable by tools and practice provided. Refine your techniques. You, yourself, should improve and grow with every meeting you plan.

Never work against the best interests of your participants or expect them to work against themselves. If so, you goof. They will resent the meeting. . .the waste of time. . .and they will come to resent you and your meetings in advance, when announced. You work against yourself when you expect people to sell themselves short.

Spend everything you need to accomplish your goals, as proved by the cost/benefit analysis we've been talking about. Later proofs (that you have indeed accomplished these goals) will enhance your credibility. And if you're insecure, then you'll have to learn. . .or you should resign.

Recognize the necessity of objective judgments, based on objective standards. Both can exist regardless of the industry's preference. 'To refuse to recognize that valid research' is the mark of the incompetent and the unprofessional. 'To proceed once incompetence is established' is unethical.

Recognize that the information explosion and even the explosion of new media types is an opportunity to communicate in new ways, not simply new ways to spend money. Make the hard choices now, or the media will end up controlling you and your meetings—forever.

And, if you make that extra effort toward growth and professionalism, what will you gain? Well, new competence. Therefore, new personal prospects. Probably new stature within your organization, based on the heightened respect of your associates. And certainly a strengthened foundation for self-respect, based on competence in the field. Now, isn't that a worthwhile return on your investment?

The amount of new learning and awareness needed is, for most of us, relatively small. But its judicious application is cogent. And that's where your basic skills and experience and judgment come into practice.

Meetings Management is neither an art nor a science but a synthesis of the two. And when you incorporate into your programs only those elements which can make a specific contribution to your goals, you will be practicing our craft at its most professional level.

You'll notice that we've covered a lot of heavy material without a visual blitzkrieg. And I believe you understood it. Civilization has survived five thousand years of recorded history without film and TV: use them as a tool, not a crutch!

The message is the message. . .and don't you forget it. And if you want to demonstrate that you comprehend my message, just start doing the really important message-identifying and message-protection tasks more carefully. Then you will have achieved, as a result of this session; and I will have achieved through you.

And if you want to endorse my long-standing reputation as the world's handsomest writer, just buy a copy of my new book. I'll get the message.

Thank you. . .and valid meetings to you. . . .

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